Faith and Organizations Project

Maintaining Vital Connections Between Faith Communities and Their Nonprofits

Overview Report on Project Findings

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Executive Summary

Maintaining Vital Connections

The role of faith communities in providing social services, healthcare, education, community development and a wide array of other supports to people in need has received much attention from policymakers, faith communities, researchers and nonprofit practitioners since the U.S. Presidential Faith Based Initiatives. Yet the research on this topic focuses on either activities of congregations or faith-based organizations (FBOs), with little attention to the important relationship between them.

This project compares differences among faith communities at several different levels. We use the term **faith community** to refer generally to any religious community that supports a given faith based organization or set of organizations. For example, the faith community might be a single congregation like a Quaker Meeting that is connected to four organizations: a school and two aging services agencies it founded and an interfaith coalition. Faith community may also refer to a geographical community, like the Jewish communities in Baltimore or the greater Washington area or interfaith organizations concentrating on one suburb or city neighborhood. Or the faith community could be a higher level adjudicatory or general reference to people sharing a particular faith, like an archdiocese, the coalition of synods that support the Lutheran organizations in this study, or networks of Evangelicals that support the Pregnancy Help Center.

This report addresses this relationship, sharing what we have learned from an in-depth study called *Maintaining Vital Connections Between Faith Communities and their Organizations.* The project was funded by Lilly Endowment Inc., with research activities beginning in March 2008. It examines the relationship between faith communities and 59 organizations founded by Mainline Protestants, Catholics, Jews, Evangelicals, Quakers, and African American churches located in Philadelphia and Northern Virginia and several locales between them. A second phase of the study, still in progress, expands this research to the Midwest and South. A brief report on this second phase appears at the end of this document. The study focused on the following questions:

1. **How do faith communities understand their practical theology (enacted expressions of faith and religious values regarding their work in the world), and how does that practical theology play out in stewardship of organizations?** What practical guidance would best serve faith communities and what groups or individuals (clergy, lay committee members, organization board and key staff, etc.) should receive advice and training on stewardship and related issues?

2. **How do strategies for guidance and support differ among the various branches of Christianity (mainline Protestants, Evangelicals, Peace Churches, Catholics, African American churches) and Jews?** How should guidance to those faith communities be tailored for each religion and denomination? What lessons apply to all faith communities?

3. **What strategies can a faith community use to address concerns regarding the faith- base in organizations under its care or affiliated with that religion?** How do strategies differ depending of the level of formal control that the founding faith has over

the organization? How does a faith community remain stewards of an organization when it is legally independent of its founding religious body?

The project is unique because it explores the role of specific religious and denominational theology and religious culture in service activities, providing concrete products specific both to that religion, as well as more general theologically grounded materials. Rather than subscribe to one universal typology for identifying an organization as faith based, the project expects that various religious traditions would organize provision of social welfare differently. The project completed a pilot study in 2006 that primarily examines this issue from experience in organizations.

This report provides an overview of findings from the project's second phase, which focuses on guidance, stewardship and connections from the standpoint of both founding faith communities and faith based organizations, with particular attention to the relationship between founding community and FBO governance structures.   The rich pool of data we have collected addresses many specific issues, but several key findings stand out:

Practical theology:

❖ ***Although all faiths use similar techniques to support and guide their organizations, the theological rationale and strategies for providing guidance differ across denominations and religions.***   Mechanisms like fundraising, board appointments, providing in-kind supports, the nature of informal connections between faith community and organization each varied based on the **practical theology** of the particular founding or supporting religion. The project developed a working definition of **practical theology** as:

> *The formal and informal strategies a community uses to carry out its theological teachings, religious-based values, everyday practices, and religious culture in faith community activities and interactions with nonprofits affiliated with that religion.*

❖ **Embedded religious values are as important as explicit references to a given faith.** ***Our research also revealed significant differences in the extent and ways that the various faiths used God language and included faith-based messages in their programming.*** The notion of **embedded theology** refers to:

> *Unstated values and/or expressions that may not be vocally articulated, but define the particular faith community.*

The pilot study suggested that organizations could strongly rely on their faith traditions without exhibiting any of the open expressions of faith that most typologies uses to identify an organization as faith-based. In fact, several of the organizations clearly follow through on religious teachings in their programming without any outward signs of a particular religion. Organizations appeared on a continuum from Jews, where religious values were often embedded in organizational practice but rarely mentioned in programming or materials to Evangelicals, where every aspect of the organization may be suffused with explicit expressions of religion. In general, religions that see faith as individual commitment, such as the Evangelicals, African Americans and some Mainline Protestants, were more likely to use expressive language while religions with strong focus on communal religion by birth or

commitment such as Jews and some Catholics used fewer references to faith in their organizations.

In addition, the pilot study suggests that those religious traditions that strongly emphasize religious tolerance and an appreciation for theological diversity tend to embed their religious commitments more implicitly within their service organizations, rather than make those commitments explicit. This appears to be driven by a desire to avoid imposing religious views on others, independent of other factors analyzed here. This current study provided further evidence that embedded practical theology remains important for faith based organizations and that faith communities look for these embedded cultural attributes in their evaluation of the faith based organizations they support.

> Additional information on practical theology and embedded versus explicit religious aspects in the activities of nonprofits and their relationships with their faith community is available in chapter four of the full report.

> **Mechanisms for Maintaining Vital Connections:** This study explored a variety of mechanisms to maintain connections between faith communities and the organizations they had created. Key findings include:

- ❖ **Stewardship means more than a founding faith community's provision of resources to the organizations it created.** In some religious circles, particularly among Mainline Protestants, stewardship is currently understood as garnering and managing resources – particularly funding – for faith communities and organizations. This research revealed that the guidance and support relationships encompassed much more than supplying funds, in-kind supports and volunteers.

- ❖ **Faith communities are much more willing to support organizations that reflect their current beliefs and religious culture than institutions that simply have a historic connection to that faith.** Organizations with strong connections to their founding communities interacted on many levels, with faith-based organizations and their supporting faith communities in a dynamic relationship based on practical theology that reaffirmed and strengthened both nonprofit and the faith community. In these successful relationships, faith communities do not define stewardship of their organizations as only providing funding or other tangible resources, as is commonly understood in some religious circles.   As a result, our research reclaims earlier, broader definitions of **stewardship** as:

> *The faith community's efforts to maintain its practical theology of justice and charity in the activities of the nonprofits affiliated with that religion or denomination.*

Relationships were maintained through both formal and informal mechanisms:

- ❖ **Formal Relationships**
    - o **Board recruitment and composition** – What percentage of the board is required in the bylaws to come from the founding faith community? What percentage is expected to come from the faith community given unspoken assumptions about who should be responsible for the organization? This can range from 5 percent or less in the case of some religious orders, to 50 percent

in the case of many Quaker organizations, to as much as 100 percent in some evangelical agencies. Even though many organizations do not stipulate a minimum number of board members, the majority of their board members may still be drawn from the founding faith. For example, while few Catholic and Jewish organizations stipulated a percentage of board membership had to come from the founding religion, board were generally exclusively or predominantly from the founding religion. On the other hand, Mainline Protestants and Quakers tended to specify that a percentage of board members come from the founding faith or denominations from affiliated congregations and often had much more diverse boards. This has relevance for stewardship of religious connections in several ways:

- In general, an agency's board is charged with preserving faith community identity, particularly if a majority of the staff and/or clientele are NOT from the faith community.
- The ability of board members to provide guidance on the faith community's values and practices, however, varies enormously, depending on the board members' understanding of their faith.
- Boards also varied widely in the practices they used to orient members on faith traditions and practices.

o **Staff recruitment and composition -** Strategies varied from advertising in the faith community's media (Jewish agencies and some Catholic), to ascertaining that prospective staff agreed with the philosophy of the agency even if they were not members of the faith community (other Catholic agencies, Jewish, Quaker), to not asking at all. With the possible exception of some evangelical agencies, most staff persons are not *required* to be members of the faith community.. In some cases, however, it is an unstated preference.

o **Leadership -** Most of the organizations that maintain strong ties to their faith have executive directors and other key leaders (e.g. fundraising or outreach staff) who come from the founding faith. Unless the organization is founder-driven, organization leadership is usually chosen by the board. The importance that the board places on the leaders belonging to the founding faith, identifying with a specific denomination or branch of that faith, or sharing the core values of the faith sets the tone for the retention of religious values within the organization. As a result, leadership was often chosen based on its ability to represent the embedded culture of the organization, if not the faith community's explicit beliefs.

- o **Umbrella organizations proved important resources for both faith communities and organizations and vital links to maintain the faith base for non-profits -** Umbrellas took several forms - communal structures like Jewish Federations, Catholic order-created systems, interfaith organizations, nonprofit professional organizations like Friends Services for the Aging, Catholic Charities USA, and the various Jewish professional organizations. Mainline Protestant and Evangelical organizations were least likely to participate in professional associations, though they might take part in informal local networks and coalitions such as interfaith or clergy networks.

- o **Formal reporting requirements** – Formal reporting mechanisms vary and are not always used. They range from annual oral reports to the founding congregation, to an expectation that annual reports or newsletters will be provided to the founding faith community, to specifically-mandated yearly third-party financial audits, to the formal contracts requiring regular written reports that a Jewish organization typically has with its federation.

- o **Evaluation of staff on their success in providing service in a manner in keeping with faith community values and philosophy** – There were wide variations: Does this kind of evaluation happen at all? How formal is the evaluation process? Who does the evaluation – a faith community board member or the agency supervisor?

- ❖ **Informal strategies to maintain connections:** Implicit, embedded practices are as important a form of stewardship as are formal relationships. These may include styles of fundraising or simply the fact that members of the faith community pay attention to the organization and comment on its ability to live up to cultural hallmarks of faithfulness.

  - o **Informal monitoring practices:** The informal practices that the faith community used to monitor organization activities ranged from faith community members communicating with board members or organization leadership to writing articles or opinions in faith community media regarding their view of the organization. Faith community members' informal comments on the quality and faith base of the services was carefully watched by boards and staff as indicators of whether or not the organization was behaving in ways expected by its supporting community. Organization leaders understood that negative comments could lead to dwindling support of the organization.

  - o **Faith community media:** In communities with local newspapers for the faith, local or ethnic community, organizations could become the subject of media attention and letters to the editor. Organization leaders paid careful attention to the media and often encouraged positive press. They also used media to reach out to faith community members.

- o **Social networks:** Organizations providing direct service to faith community members often had strong informal connections with members. This could range from sending children to a religious school, participating in a social service program, or occasionally using a hospital or clinic sponsored by a particular religion.

- o **Volunteers:** Volunteers are the heart of the faith-based element within most Mainline Protestant, Evangelical and African American church organizations we have studied, but their importance varies for Jewish and Catholic organizations. Volunteers and board members often interpret their work as an extension of their personal theology, viewing service both as an obligation and as an expression of faith. However, faith in action rather than theological exactitude tends to be the primary concern for volunteers. For example, feed the hungry was often understood as (enacting religious teachings, but volunteers were less concerned with the specific activities behind their acts of generosity. Volunteers' sense of their obligation to the organization is generally tied to how they perceive its activities as matching their own ideas of stewardship.

- ❖ **Resources:** Resource stewardship involves both the mechanisms by which the faith community supports its organizations and the forms these supports take. Generally, faith communities provide their organizations with similar kinds of resources: funds, in-kind supports, the use of faith community property, volunteers, and sometimes back office supports like centralized insurance, recruitment and religious training. However, the mechanisms for sharing these resources varied greatly among faiths:

- ❖ **Although most faith-based organizations can identify what they expect from their founding faith communities, most faith communities had limited understanding of how to successfully guide and support to their organizations.** With the exception of Jews and some Catholic orders, few faith communities had educational tools or clear goals for organizational stewardship. Agencies often appointed board members without much guidance on their role in the organization or responsibility to report back to the founding faith community. This suggests that developing and disseminating tools for

faith communities to prepare board members, lay leaders and clergy as stewards of their organizations is a critical need.

❖ **Informal mechanisms to maintain relationships were often more important than formal mechanisms in fostering vital ongoing connections between faith communities and organizations.** Organizations that kept in close contact with their supporting faith communities and vice versa thrived, while organizations lacking those informal connections had trouble gaining support from their founding communities.

Suggestions for Improving Connections:

❖ **Educate the agency leadership (board and key staff):** Leaders must regularly articulate the faith base of the action for it to remain alive.

   o Boards and other selectors of staff should seek leadership who can articulate the stewardship focus.
   o Organizational leaders should consider implementing or adapting Jewish organizations' tradition of rotating board members through different organizations and various committees in the faith community and individual agencies to encourage a full understanding of the organization.

❖ **Clarify faith communities' role as stewards of their organizations.** Tools and materials need to be developed for faith communities on such topics as what stewardship means, strategies for developing strong board members, and appropriate mechanisms for the organization to share its work regularly with the faith community.

❖ **Build informal relationships.** Both faith communities and faith-based organizations should pay attention to ways that they develop social capital networks through fostering a variety of ways that faith community members can become involved with or learn about the organization and its activities. Strong informal relationships lead to more successful fundraising, organizational operations, and ability to carry forward agency mission. In turn, involvement with the agency can strengthen commitment to the faith community for members or draw new members to that religion or denomination.

Additional information on strategies to maintain connections between faith communities and faith based organizations is available in chapter six of the full report.

Faith Tradition Systems:

❖ **While each religious group employs unique strategies, we identified three broad systems that religious communities use to organize their connections to organizations under their care that reflect practical theology and stewardship strategies. These systems come out of the faith communities, shaping both the stewardship strategies of religious institutions and the ways that nonprofits from that religious tradition approach faith communities for support and guidance.**

Identifying systems is important because the best practices, weaknesses, and logic behind non-profit activity are specific to each system. While organizations coming from another system could adapt some approaches from another system for their use, wholesale attempts to use strategies appropriate for another system are unlikely to work because they run counter to the

cultural and theological logic behind the founding relationship between faith community and organization. As such, these findings have implications both for public policy and practice.

Institutionalized systems organize and centralize supports at the community level, with expectations that the entire community is responsible for those in need. Jews and Catholics used this system, though they differed in their structure. Catholic systems were integrated into either the archdiocese or order while Jewish systems centralized all social and health services, with the synagogues remaining independent from the service system.

Institutionalized systems evolved from a theology that insists the community/church as a whole is responsible for caring for those in need. This obligation may be conceived as applying only to members of that religion or the whole world. In Jewish traditions, key theological constructs include *tikkun olam* (responsibility to care for the world - which sometimes means all Jews and other times means anyone in a particular group) and a series of Talmudic concepts related to an obligation to support the community and those in need within it. For Catholics, key founding theology includes the expectation that Catholics, as the church universal, are responsible both for all Catholics, and by extension all potential coverts to Catholicism. Encyclicals (formalized moral teachings) regarding preferential treatment of the poor, universal health care, etc. that come from the Pope and the Council of Bishops also contribute to the general framework of religious activity.

Major features of Institutionalized systems are:

o   They centralize fundraising, volunteer recruitment, training and sometimes facilities management.

o   They have a strong tradition of planning at a centralized level for the community or its institutions as a whole.

o   Centralized bodies occasionally encourage or force mergers or collaborations among organizations in the community for the greater good of the systems as a whole.

o   They have the ability to share resources across the system through either Federation allocations or Catholic Order or Archdiocese-sponsored agreements to share resources.

o   They develop strong networks of religiously based national umbrella organizations in addition to the local centralized systems that provided additional support and networks for organizations for that religion.

o   There is a tendency for organizations outside the centralized umbrella to still develop ties with other organizations either through interfaith entities or independent groups of organizations from the same faith. Schools are connected with the wider faith community and the centralized umbrella (federation, order, archdiocese), but most Catholic and Jewish schools in some communities are under the direct sponsorship of congregations.

Congregational systems see congregations as the central organizing force for justice and charity work, viewing ministries as coming from individual or corporate calls for service that congregations support. Ministries or programs, such as a church food pantry, may begin as efforts within a congregation but they usually become institutionalized as independent nonprofits. Nonprofits sponsored by individual congregations or groups of congregations tended to turn to their sponsors for all forms of support. In this study, Mainline Protestants, some African American churches, and Quakers fell into the congregational system. While none of the Evangelical nonprofits in this study sample in fell into this category, it is likely that some evangelical groups do use this system as well.

The theology behind congregational systems comes out of the Protestant reformation and the religious movements that created the peace churches. This religious tradition emphasizes the local congregation as the primary vehicle for carrying out the mandates of faith in a community (though congregations may be supported in this task by centralized denominational structures). The organizational impetus comes from ministries of individuals within a congregation or from the congregation as a whole. These organizations either formalize as separate 501c3 nonprofits or become projects of the church with independent advisory committees and sometimes separate bank accounts.   Well-established organizations maintain strong ties to congregations or at least retain vestiges of these congregational roots through board appointments and other mechanisms.

Major features of Congregational systems are:

o   Their ministries often formalize as either independent programs of their founding congregation(s) with independent advisory committees and separate accounting systems, or spin off into independent 501c3 organizations with limited ties to congregations or form as interfaith entities.

o   The organizations maintain ties to one or more congregations through board appointments, appeals for resources, volunteers and in-kind supports.

o Most of our congregational organizations saw volunteering as an important component of organizational activity, and it created volunteer opportunities for people from their denomination and others.

o Established congregational organizations usually maintained ties to their founding faith by requiring that a percentage of board members be from the founding faith or founding congregations.

o Congregational system organizations from Mainline Protestant and Quaker organizations often embedded their faith in more general values, with many specifically stating that they valued theological diversity within a general spiritual or Christian context, and on principle they did not proselytize.

o In some cases, the relationship between congregational organizations and their founding faith communities involved the organization serving in such a way that community members were drawn to the congregation.

o Congregational system denominations created fewer umbrella organizations like professional associations for their organizations, and the organizations tended to belong to fewer umbrella groups.

Network systems transcend congregations, drawing together people with a similar faith-based vision to carry forward the work based on either social networks of the founders or institutional/virtual networks of people with a similar vision. Network based nonprofits may be connected with one or multiple congregations, but their decision-making and support systems reside outside the congregational system. Organizations in network systems differ from congregational systems in two important ways 1) the ministry is supported by a network of individuals focused on a specific ministry and 2) the people who staff these organizations either as volunteers or paid staff share the faith approach of the organizations founders, using this faith as a prime motivator in their work. In contrast, congregational organizations draw staff and involved volunteers interested in the service or ministry of the program but do not necessarily share similar approaches to faith or come from the religion of the founding congregation(s). The Network-based organizations in this study ranged from small emergency services programs

founded by one congregation member to a multi-site pregnancy center working to prevent abortions, and from a young evangelical Christian school to a nearly 200-year-old multi-service organization that provided support through well-established ministry centers.

Major features of Network systems are:

o The organizations frequently become a faith community for staff, active volunteers and sometimes program participants.

o These organizations rely on a combination of staff and volunteers, but almost all people involved with the organization share the founding faith or have some other personal connection with the ministry and their involvement is motivated by that faith.

o Resources come through networks of like-minded believers, and often organizations highlight their faith or trust in God as a source for resources for the organization.

o Since these organizations are supported through personal networks, they are more likely to end when the pastor or founder moves on. In older, established organizations, ministries can change as the leader's calling or gospel vision changes.

o One main subset of this group is formed by evangelistic organizations, for which sharing their faith is a key element of the ministry.

❖ **Social capital was an important ingredient in maintaining vital connections between faith-based organizations and their sponsoring faith communities.** Social capital refers to *social networks based on reciprocal, reenforceable trust that people and organizations use to garner resources.* Social capital includes both networks of individuals and institutions, with organizations able to maintain support over time from their founding faith communities and its institutions based on the trust-based connections developed by the agency over time. As demonstrated over and over in this study, organizations with strong ties in their founding faith communities succeeded in maintaining support and guidance from their communities, while those that had lost those networks struggled in this regard. Organizations also depend on their knowledge and manipulation of cultural

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capital, elements of the founding community's culture that have become symbols of membership in order to garner support from their constituent communities.

Social capital was an essential element to encourage civic engagement among faith community members, but networks among organizations and faith communities often were as important as individual networks. **Civic engagement** refers to *activities to support the common good* and may not necessarily involve long-term, reciprocal trust between those providing donations or in-kind goods and the agency receiving support.

Three forms of equally important social capital operate in the relationships between faith communities and their organizations. **Bonding** social capital refers to *densely linked networks of people who share similar culture and beliefs.* The networks within the African American, Jewish, evangelical, Quaker and to a lesser extent local Catholic and Mainline Protestant denominational communities are examples of bonding social capital. **Bridging** social capital *crosses boundaries of race, class, culture, or belief. However, bridging social capital involves trust based ties across groups developed over time, not weak ties.* **Linking** social capital refers to *ties across power hierarchies such as the links between an archdiocese or federation and its member organizations.*

This research discovered that each of these systems used social capital differently:

- o **Institutionalized systems** relied on high bonding social capital among both individuals and institutions to support nonprofits in these systems. In addition, institutionalized system organizations had strong, linking social capital within their communities and the multiple regional or national umbrella organizations helped agencies develop linking ties nationally both as institutions and for their staff as individuals.

- o **Congregational system organizations**, on the other hand, depended on bridging social capital through interfaith groups and outreach to congregations from a variety of denominations to maintain their organizations. While welcoming bridging ties, these organizations equally depended on bonding social capital with networks of individuals or key supporting congregations often as their primary source of support. They had weaker linking ties within their faith communities, although they regularly developed these ties with major government or foundation funders. Local level organizations often had weak linking ties to denominational structures, while denomination-wide organizations like Lutheran Immigration and Refugee Services relied on the denominations both for support and as a conduit to connect to local congregations.

- o **Network-based organizations** relied almost solely on bonding social capital. Networks could come through congregations or lay associations like right-to-life networks as well as individuals. These organizational, social capital ties became particularly important in garnering civic engagement for these organizations.

Understanding how each system uses social capital differently also provides strategies for organizations within each system. In all systems, organizations with strong social capital thrived while those lacking social networks did poorly. But institutionalized system organizations that focused on bridging ties outside of the founding religion without equally developing ties in their bonding community were far less likely to maintain strong support within the founding

community. Likewise, few congregational system organizations could survive without strong bridging ties. Often, lost or attenuated social capital came from an organization losing the cultural markers that encouraged members of the community to support it.

Additional information of faith tradition systems and social capital is available in chapter five of the full report.

Challenges and Opportunities Facing Faith-Based Organizations and Faith Communities

The project identified several challenges and opportunities that faith-based organizations and faith communities jointly face on a regular basis. Some of these were related to the life cycle of either the nonprofit or the faith community. Chapter seven of the full report provides detailed observations regarding such topics as growth and formalization of faith-based organizations and a discussion of ways that faith-based organizations respond to major demographic changes in their supporting faith communities or the populations they serve. Some key issues included:

❖ **Leadership transitions:** Leadership transitions have an impact on the religious culture in the nonprofit and the relationship between the faith community and organizations. Transitions in leadership in either the faith community or nonprofit usually bring new direction to the organization. Faith community leadership transitions can change the relationship to the nonprofit regardless of whether it is directly under the care of the faith community or an independent organization. Faith-based organization leadership transitions profoundly shape connections to its founding faith community. Boards and other faith community leadership concerned about the faith base or the version of the faith that the organization practices pay particular attention to leadership changes. However, leadership changes that fail to emphasize the faith elements and ability of new leaders to create enduring networks with members of the faith community can lead to an organization losing connections to the faith community.

❖ **Participatory attenuation:** Faith communities and faith-based organizations must develop a strategy for responding when the relationship between them becomes less strong or attenuates.

❖ **Contextual change: Impact of the 2008-2009 global recession on FBOs and their supporting faith communities:** Throughout 2008 the U.S. economy underwent a steady recession that included a major collapse of real estate values and the failure of multiple national and local banking institutions. Because many of the institutions that we studied were directly engaged in countering the effects of poverty and homelessness and were dependent upon philanthropic support, public support, or fee-for-service income, the impact of the economic downturn and the agency responses to it was dramatically evident in the data we gathered. Major findings include:

  o **Despite the increased demands that the weak economy has placed on these groups, initially few of the organizations considered service cutbacks to be a viable response to the situation.** In fact, several service agencies believed that they needed to expand their capacity, their service offerings, and their target community to meet emergent need. However, as the recession deepened, some cut staff or programs in an attempt to balance the budget.

o **The effectiveness of the various organizational strategies during the economic downturn seems to be largely contingent on two factors: adaptability and credibility.** However it is important to note that the various denominations and religions defined adaptability and credibility differently.

o **Organizations that took immediate steps responding to the economic downturn received enthusiastic support from their preestablished funding and volunteer base, but their visible rapid action was also essential to motivating new sources of support from other sectors and organizations.**

o **In an economic downturn, organizations attached only to a small number of congregations, particularly aged or lower-income congregations, had the hardest time finding sufficient resources.** Not all organizations have seen an increase in funding during the economic downturn, and several have experienced significant financial pressures based on decreased giving and increased need. Two of the organizations being studied during this project closed due to severe financial problems.

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❖ **Positive Strategies in Response to Challenges and Opportunities**

o **Understand the role the organization plays in the lives of those actively involved, regardless of their formal role as staff, board, volunteers or program participants**

o **Create open lines of communication between volunteers and board members**

- o **Incorporate the multiple generations in all aspects of maintaining connections between the faith-based organization and faith community**

- o **Define the faith community expectations for the agency and vice versa**

- o **Clarify accountability processes for both the faith-based organization and supporting community**

- o **Encourage greater integration through strengthening social networks between the organization and the faith community**

- o **Encourage organizational self-assessment and self-examination that includes reflection on stewardship of faith connections**

Conclusions: Chapter eight provides conclusions and recommendations based on this research. Overall, the project found that four factors influenced the relationship between faith communities and their nonprofits:

- ❖ **Practical theology of that religion:**

  - o **Faith communities that used stewardship strategies to convey their practical theology to their organizations successfully over time were more likely to maintain strong relationships with those non-profits.**
  - o **Organizations that reflected the embedded culture of their founding faith had broader and stronger support from their supporting faith communities.**
  - o **Relationship tensions often reflected concerns that an agency or certain of its activities no longer reflected this founding practical theology from parts of the faith community.** However, these concerns could reflect two very different situations:
    - ▪ **Faith community consensus that the organization did not reflect current values**
    - ▪ **Faith-based nonprofits as a target for ongoing theological debates in the faith community.**

- ❖ **History of that faith community in the United States**

- ❖ **The quality and nature of social capital between faith community and organization.** This finding suggests several strategies to strengthen connections between faith communities and organizations:
  - o **Both organizations and faith communities need to pay equal attention to building social capital as a way of clarifying their stewardship mechanisms and practical theology for organizations.**
  - o **Developing and strengthening umbrella organizations is another important aspect of both maintaining connections and building healthy organizations.**

- ❖ **The nature of the service provided.** We found much in common in the organizational forms and service provision of the various schools, social service agencies, retirement communities, healthcare institutions, community development entities, and emergency services organizations that participated in this study. As such, stewardship strategies necessarily differ depending on organization type. However, we simultaneously found

similarities and differences among organizations providing the same service, with those differences often reflecting the founding faith traditions. These dual strategies are best understood not as contradictory forces in opposition, but as two equally important strands of maintaining healthy organizations that provide quality services from a clear mission.

The report is designed provide a general overview of our key findings for discussion among faith community leaders, nonprofit leaders, and others interested in these questions. These findings and material on other topics will be developed into a series of practical tools for practitioners, best practices and case studies, academic publications, and policy recommendations, available at http://www.faithandorganizations.umd.edu/. Please address any communications to faithandorganizations@anth.umd.edu.

The full report provides an overview of findings on our research questions and key findings that came out of this first phase of our study. A companion volume looks at these same issues in more depth for each major religious group (Mainline Protestants, Catholics, Jews, Evangelicals, Quakers, and African Americans).

Introduction

❖ *A major Jewish social service and recreation organization faces a dilemma about both honoring its founding faith and meeting the needs of everyone served by the organization. The community's Jewish Federation, the central planning, fundraising and support entity has established rules that no Jewish agency can be open on Saturdays in honor of the Sabbath, yet a large percentage of the membership at one branch of this organization are less religious Jews who would prefer to relax on the Sabbath in a Jewish environment like this organization. The leadership of the Jewish community understands the diverse needs of Jews in this area, but for over 30 years fails to pass a change to allow this one center to open due to strong public objections from the Orthodox community. In 2009, through behind the scenes conversations with people from diverse parts of the community, the Federation passes this change. While some Orthodox members protest, demonstrations are mild.*

❖ *A Mainline Protestant community development organization operates successfully for many years with the support of a coalition of churches. But several years after a leadership change, interest in the organization has waned and the downturn in the economy cuts many of its sources of support. The organization closes.*

❖ *A Catholic hospital system founded by a religious order is now separately incorporated. While some board members and key staff come from the founding order, the Sisters are concerned about maintaining a Catholic ethos in the institution.*

❖ *A large, historic African American church in an impoverished neighborhood hosts three affiliated organizations providing services to low income, African American children and families under the auspices of the church, all receiving federal funding. As the congregation has aged and the middle class moved away, church attendance and budgets have dwindled. Its current activist pastor struggles to maintain crumbling buildings and build the church while keeping these ministries alive as funding from all sources diminishes.*

❖ *An archdiocese decides that the various social service and justice agencies founded by Catholics in its jurisdiction would be most easily managed and more likely to follow Church guidance if they were all under the Catholic Social Services umbrella and merge several independent agencies into this structure. In their independent advisory committee meeting, one of the newly merged organizations' supporters expresses concern that this change will mean that funds raised for program initiative will go back to the archdiocese, and that they will no longer be able to carry out their ministry as planned. The supporter is Catholic, as are much of the board and staff.*

❖ *A member of a large Quaker Meeting has a leading to start a school, and the meeting spins- off a worship group to support her in this effort. Several years later, the school has grown and the worship group has become a separate Meeting, which still has the school formally under its care. Concerned that their small numbers mean that they can no longer provide adequate stewardship for the school, the Meeting and school ask the local Quarter to consider taking the school under its care. A committee is formed to address this question.*

❖ *An evangelical crisis pregnancy clinic thrives, expanding and buying state-of-the-art equipment. While it clearly has a strong network of supporters and reflects its faith-based mission, outsiders have trouble understanding its governance processes or identifying its funding sources and the community that sustains it.*

These examples illustrate the challenges faced by religious leaders seeking to provide guidance and maintain connections to the founding faith for non-profits founded by religious groups. In each case, religious leaders use governance mechanisms like appointing board members, planning or administrative structures, and funding as primary means to maintain connections to the organizations. Yet the dilemmas presented here regarding the right relationship to the founding faith community, organization mission and activities reveal that effective relationships go far beyond these mechanical solutions.

The Catholic and Quaker school examples illustrate that faith communities struggle to determine the best administrative structures to ensure effective oversight of their organizations as they grow and change. The African American church example illustrates the dilemma pastors face trying to address equally important theological and moral imperatives of sustaining their church and community as resources dwindle.

The Jewish and archdiocese social service examples demonstrate that internal theological debates play out in community strategies to translate theology into practice through organization activities. Discussions regarding when a Jewish organization should be open or how much control the archdiocese should have over Catholic faith based organizations stem from ongoing debates within each faith regarding theology and the ways that religious culture plays out in these organizations.

While both religious leaders and faith based organization leaders face problems like these on a regular basis, few research based solutions have been offered to provide guidance. The role of faith communities in providing social services, healthcare, education, community development and a wide array of supports to people in need has received much attention since the U.S. Presidential Faith Based Initiatives. Yet the research on this topic focuses on either activities of congregations or faith based organizations, with little attention to the important relationship between them.

This report addresses this relationship, sharing what we have learned from an in-depth study called *Maintaining Vital Connections Between Faith Communities and their Organizations.* The project was funded by the Lilly Endowment, with research activities beginning in March 2008. It examines the relationship between faith communities and 59 organizations founded by Mainline Protestants, Catholics, Jews, Evangelicals, Quakers, and African American churches located from Philadelphia to Northern Virginia. A second phase of the study, still in progress, expands our research to the Midwest and South. A brief report on this second phase appears at the end of this document. The study focused on the following questions:

1.   **How do faith communities understand their practical theology, or enacted expressions of faith and religious values, regarding work in the world, and how does that practical theology play out in stewardship of organizations?** What practical guidance would best serve faith communities and what groups or individuals (clergy, lay committee members, organization board and key staff, etc.) should receive advice and training on stewardship and related issues?

2.   **How do strategies for guidance and support differ among the various branches of Christianity (mainline Protestants, Evangelicals, Peace Churches, Catholics, African American churches) and Jews?** How should guidance to those faith communities be tailored for each religion and denomination? What lessons apply to all faith communities?

3.   **What strategies can a faith community use to address concerns regarding the faith base in organizations under its care or affiliated with that religion?** How do strategies differ depending of the level of formal control that the founding faith has over the organization? How does a faith community remain stewards of an organization when it is legally independent of its founding religious body?

Note on Terminology

This project compares differences among faith communities at several different levels. We use the term **faith community** to refer generally to any religious community that supports a given faith based organization or set of organizations. For example, the faith community might be a single congregation like a Quaker Meeting that is connected to four organizations: a school and two aging services agencies it founded and an interfaith coalition. Faith community may also refer to a geographical community, like the Jewish communities in Baltimore or the greater Washington area or interfaith organizations concentrating on one suburb or city neighborhood. Or the faith community could be a higher level adjudicatory or general reference to people sharing a particular faith, like an archdiocese, the coalition of synods that support the Lutheran organizations in this study, or networks of Evangelicals that support the Pregnancy Help Center.

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We also recognize that theology differs both across religions and within them. We use the term **religion** to refer to clearly delineated faiths – in this study Catholics, Protestants, Peace churches (Quakers, Mennonite, Brethren) and Jews. We use **denomination** to refer to divisions within religions: for example Orthodox, Reform or Conservative Jews, various Protestant denominations (Lutherans, United Methodists, Baptists, independent, etc.). Finally, recognizing commonalities among African American Christian strategies, we occasionally refer to **racial or ethnic** cultures that cross-cut denominations.

Existing Research on Faith Communities and their Nonprofits

A growing body of research focuses on issues related to faith communities' provision of services (Cnaan et al 2002, Chaves 2004, Chaves and Tsitsos 2001, Grettenberger 2001, Unruh and Sider 2005). Most of this research concentrates either on individual congregations or coalitions of worship communities. Scholars debate the percentage of congregations to offer social services, but agree that the majority provide some formal or informal supports to their members and others in their communities. This research highlights that, with the exception of African American churches, most congregations offer short term emergency services initiatives or education/youth development as their primary social outreach. Based on the African American church's historic role as central community institutions (Lincoln and Mamiya 1990, Day 2002), like the African American church described above, African American congregations are more likely to develop comprehensive programs and seek government funds than white dominated congregations. In general, few congregations seek government funds or want to develop formal social service, health, or community development programs.

This research suggests that theological motivations and role of evangelism in faith community service activities is varied and complex (Unruh and Sider 2005). While comparisons have been made among Protestant denominations and Catholics, most research on religious nonprofits and service activity focuses primarily on Christians. The exceptions are recent studies of immigrant faith communities (Ebaugh and Chafetz 2000, Foley and Hoge 2007). While Muslims are emerging as a new study topic, little attention has been paid by religious researchers outside of the Jewish community to Jewish initiatives. Few comparisons across religions exist (Schneider, Day, Anderson 2006, Bane, Coffin and Higgins 2005).

The literature uniformly shows that faith communities regularly work with non-profits to support those in need (Chaves and Tsitsos 2001, Cnaan et al 2002, Ebaugh and Chafetz 2000, Foley and Hoge 2007, Ammerman 2005, Wuthnow 2000). This includes a wide variety of activities: feeding and clothing the poor or disaster victims through soup kitchens, disaster aid organizations, food and clothing pantries and homeless shelters; resettling refugees; aiding hospitals and nursing homes; building houses; mentoring children, welfare recipients or prisoners; adopting schools; hosting day care centers; allowing various youth groups, twelve step programs and other community groups to use faith community space; and a wide array of other activities. Faith communities work both with faith based organizations and secular institutions (Schneider 2006, Sherman and Green 2002). According to research by the Organizing Religious Work project, the average congregation collaborates with an average of six community outreach organizations, and a third of these organizations are religious nonprofits; their research also found that Mainline congregations tend to be the most invested in community partnerships, followed by Jews and Catholics (Ammerman 2002).

A growing body of practical materials on the mechanics of creating congregational ministries or faith based organizations is now available from Alban Institute (http://alban.org/bookstore.aspx), Baylor University's Center for Family and Community Ministries (http://www.baylor.edu/social_work/cfcm/index.php?id=66992) and others (for example, Queen 2000). However, few resources provide guidance for faith communities on maintaining connections, providing guidance and offering spiritually grounded support with established faith based organizations. The *Connections* study focused specifically on this issue, looking both at common strategies across faiths and unique approaches for each religion and denomination.

Another growing body of research looks at faith-based organizations (Jeavons 1994 and 1998, Demerath et al 1998, Monsma 1996, Campbell 2002, Kennedy and Bielefeld 2003, Sider and Unruh 2004, Bane, Coffin and Higgins 2005, Smith and Sosin 2001). While this research often outlines the percentage of board and staff from the founding faith and the role of faith in mission statements or programming, it generally focuses on organizations independent from their founding communities. Much of the discussion focuses on characterizing faith based organizations (Sider and Unruh 2004, Smith and Sosin 2001, Ebaugh et al 2006). While some policy makers and scholars find these typologies helpful, others have critiqued them as reflecting Protestant and Evangelical perspectives (Schneider, Day, Anderson 2006, Jeavons 2004). Another evolving research interest explores whether faith based organizations provide "better" services than secular non-profits (Kennedy and Bielefeld 2003, Wuthnow, Hacket and Hsu 2004, Amirkhanyan et al 2009).

The Faith and Organizations project is one of few projects exploring different strategies that each faith tradition uses to guide and support these organizations. As the examples at the beginning illustrate, faiths vary widely in terms of formal care relationships, percentage of the board required to come from the founding faith, and planning strategies. This highlights that each denomination and religion has developed its own strategies for oversight of the nonprofits its faith creates to carry forward ministries of justice, social equity and charity. Congregations and higher level adjudicatories have different roles as stewards in each denomination and religion. As Jeavons (2004) points out, solutions crafted for one faith will not always work for others. For this reason, religious leaders look for guidance that understands both the similarities across religious traditions and differences specific to each faith and denomination, as well as diversity within religious traditions.

Major Findings

The Faith and Organizations project was created to provide concrete information on the relationship between faith communities and their organizations as well as practical guidance and tools based on this research. The project is unique because it explores the role of specific religious and denominational theology and religious culture in service activities, providing concrete products specific both to that religion, as well as more general theologically grounded materials. Rather than subscribe to one universal typology that identifies an organization as faith based, the project expects that various religions would organize social welfare provision differently. We also have found that the relationship between formal non-profits and congregations may vary among Catholics, Protestants, Jews, Peace Churches, Evangelicals, and Muslims. In addition, participants recognize that race, immigrant status, and region of the county

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might also impact on the form of service provision and connections between faith communities and their non-profits. The project completed a pilot study in 2006 that primarily looks at this issue from experience in organizations (Schneider, Day, Anderson 2006, Schneider 2007, 2007b, 2000c).

This report provides an overview of findings from the project's second study, which focuses on guidance, stewardship and connections from the standpoint of both founding faith communities and faith based organizations, with particular attention to the relationship between founding community and FBO governance structures.   The rich pool of data we have collected addresses many specific issues, but several key findings stand out:

❖ **While all faiths use similar techniques to support and guide their organizations, the theological rationale and strategies for providing guidance differ across denominations and religions.**   Mechanisms like fundraising, board appointments, providing in-kind supports, informal connections to their organization each varied based on the **practical theology** of that particular religion. The project developed a working definition of **Practical theology** as:

> *The formal and informal strategies a community uses to carry out its theological teachings, religious based values, every day practices, and religious culture in faith community activities and interactions with non-profits affiliated with that religion.*

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❖ **Faith communities are much more willing to support organizations that reflect their current beliefs and religious culture than institutions that simply have a historic connection to that faith.** The Jewish and Evangelical examples at the beginning illustrate

the religious debates and faith based excitement that faith communities focus on their organizations. Organizations with strong connections to their founding communities interacted on many levels, with faith based organizations and their supporting faith communities in a dynamic relationship based on practical theology that reaffirmed and strengthened both non-profit and the faith community. In these successful relationships, faith communities do not define stewardship of their organizations as only providing funding or other tangible resources, as is commonly understood in some religious circles.

As a result, our research reclaims earlier definitions of **stewardship** as:

> *The faith community's efforts to maintain its practical theology of*
> *justice and charity in the activities of the nonprofits affiliated with*
> *that religion or denomination.*

❖ **Despite unique strategies for each religion, we identified three broad systems that religious communities use to organize their connections to organizations under their care that reflect practical theology and stewardship strategies. These systems come out of the faith communities, shaping both the stewardship strategies of religious institutions and the ways that nonprofits from that religious tradition approach faith communities for support and guidance.** While each system can learn from each other, strategies would need to be adapted to fit the practical theology of a particular religion.

- **Institutionalized** systems organize and centralize supports at the community wide level, with expectations that the entire community is responsible for those in need. Jews and Catholics used this system.

- **Congregational** systems see congregations as the central organizing force for justice and charity work, viewing ministries as coming from individual or corporate calls for service that are recognized and supported by congregations. Ministries may start out as efforts within a congregation like a church food pantry, but usually become institutionalized at some point as an independent non-profit. For instance, the African American church example at the beginning describes an initiative coming from a call from its activist pastor that has continued after that pastor retired in the form of three quasi-independent non-profits. The LIRS national office in the study came out a concern among Lutherans at a synod level regarding caring for Lutheran refugees that has expanded and changed over the years. Yet this national organization still turns to local congregations to host refugee families. Non-profits were sponsored either by individual congregations or groups of congregations, turning to these congregations for all forms of support. In this study, Mainline Protestants, some African American churches, and Quakers fell into the congregational system. While none of the Evangelical nonprofits in this study sample in fell into this category, it is likely that some Evangelical groups do use this system as well.

- **Network** systems transcend congregations, drawing together people with a similar faith based vision to carry forward the work based on either social networks of the founders or institutional/virtual networks of people with a similar vision. The Pregnancy Help Center described at the beginning of this report is an example of a thriving network system organization. These organizations are most likely to hire staff or use volunteers exclusively from people who share the same faith and ground programming in that faith.

While the only network system organizations in this study were Evangelical Christian non-profits, we recognize that other faiths also use network organizational strategies.

❖ **While most faith based organizations can identify what they expect from their founding faith communities, the most faith communities had limited understanding of how to successfully provide guidance and support to their organizations.** With the exception of Jews and some Catholic orders, few faith communities had educational tools or clear goals for organizational stewardship. Board members were often appointed without much guidance on their role in the organization or responsibility to report back to the founding faith community. This suggests that developing and disseminating tools for faith communities to prepare board members, lay leaders and clergy as stewards of their organizations is a critical need.

❖ **Informal mechanisms to maintain relationships were often more important than formal mechanisms in fostering vital ongoing connections between faith communities and organizations.** Organizations that kept close contact with their supporting faith communities, and vice-versa thrived while organizations lacking those informal connections had trouble gaining support from their founding communities.

❖ **Umbrella organizations proved important resources for both faith communities and organizations and vital links to maintain the faith base for non-profits.** Umbrellas took several forms - communal structures like Jewish Federations, Catholic order created systems, interfaith organizations, non-profit professional organizations like Friends Services for the Aging, Catholic Charities USA, and the various Jewish professional organizations. Mainline Protestant and Evangelical organizations were least likely to participate in umbrella organizations, though they might take part in informal local networks and coalitions.

❖ **In an economic downturn, organizations attached only to a small number of congregations, particularly aging or lower income congregations, had the hardest time finding sufficient resources.** The Mainline Protestant and African American examples above illustrate this trend.

This report is designed provide a general overview of our key findings for discussion among faith community leaders, non-profit leaders, and others interested in these questions. These findings and material on other topics will be developed into a series of practical tools for practitioners, best practices and case studies, academic publications, and policy recommendations. We welcome suggestions regarding areas for future targeted publications on data available from this study and practical tools that would best serve your religion or organization. As outlined in the conclusion, products from the project will be available through the project website and through a number of sources affiliated with various religions, denominations and types of social service organizations. A product advisory committee (see appendix I) will oversee product development. We welcome suggestions for other products and avenues to share our work.

After a brief discussion of methods, the report provides an overview of findings on our research questions and key findings that came out of this first phase of our study. A companion volume looks at these same issues in more depth separately for each religion or denomination. Appendices include some background information on those involved in our study, samples of the self-assessment instrument, and history of the Faith and Organization project.

Methods

This section provides a general overview of who we studied and how, written for a general audience. Researchers interested in more detail on methods can obtain information from the authors. As detailed in this matrix, the first phase of the study in 59 faith community and non-profit organization sites from Philadelphia through Virginia. Some organizations chose to use pseudonyms and those organizations are indicated with an *. The project compared strategies for guidance, support and maintaining connections among Catholics, Jews, several mainline Protestant and Evangelical denominations, Quakers, and the African American church. Depending on the religion or denomination, stewardship activities may be carried out primarily by congregations, higher level adjudicatories like Jewish Federations, an archdiocese or a Quaker Yearly Meeting, intermediary organizations, such as Friends Services for the Aging, or Catholic Health Care Association, or a combination of any of these institutions.
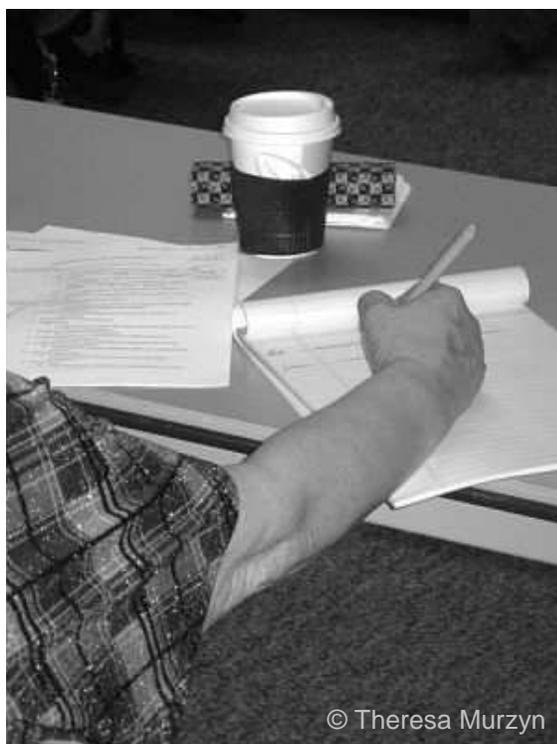
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The project relied on several qualitative methods, however, one of the products of the study will be a combination qualitative and quantitative self-assessment for faith communities and organizations. Research looked at stewardship strategies at two levels: 1) the faith community's understanding of stewardship and a general overview of the types of organizations it considers affiliated with the faith community and 2) specific relationships with selected organizations. The study design involved two phases: 1) an intensive research phase comparing religions and types of organizations on the east coast and 2) an expansion phase that would involve testing the self-assessment instrument and some less intensive research in additional organizations per faith in the South, Midwest and east coast. The second phase is slated to be completed by Fall 2009.

The initial phase of research developed a comprehensive understanding of how each selected faith community envisions and operationalizes stewardship, including a comparison of stewardship practices for organizations in each of three categories for each faith. Phase one used a combination of the following methods:

❖ **History of the faith community's stewardship of organizations and ministries. History of the relationship between the faith community and specific selected organizations.**
  Histories were developed using a combination of any existing histories of the organization or faith community, review of documents related to stewardship such as minutes of meetings related to the organization, religious statements or other documents regarding justice and charity activities and guidance of organizations developed by the religion or organizations; and interviews with people knowledgeable about stewardship in that faith; or the relationship

between the faith community and specific organizations.

❖ **In-depth interviews with current and former key individuals from the faith communities and organizations involved in the relationship to selected organizations to understand the nature of current stewardship activities.**

❖ **Participant observation in faith community stewardship activities and selected organization events related to faith community stewardship.**   Participant observation means attending activities or sitting in on meetings relevant to maintaining connections to the organization. These vary by faith tradition and include faith community committee meetings, presentations by selected organizations to the faith community, organization board meetings, annual meetings and events for the larger community. Participant observation opportunities may involve infrequent activities (such as an annual presentation at a Yearly Meeting or Synod conference, annual Christmas party or organization festival that honors volunteers), quarterly committee meetings or monthly board meetings. In addition to observing Meetings and events, our staff participated in weatherization days, summer arts programs and other direct service volunteer activities where relevant. While observing, researchers also talked with participants about how they learned about the organization or event, their thoughts on the organization, and key faith related reasons for being involved with the organization.

❖ **Analysis of recent and ongoing written materials produced by the faith community and selected organizations** (board and committee minutes, outreach and recruitment materials, theological materials related to charity and justice activities, etc.).

Our proposal included comparisons across six religions or denominations, four types of organizations (social service, health and senior services, community development, and education), and three levels of relationship to the founding faith (substantially under the care of the founding faith community, strongly affiliated, independent).   We quickly learned that we could not easily categorize organizations into our three relationship categories because they differed significantly for each faith. Given this variety of relationships, we decided to let each religion define the three boxes themselves:

❖ **Jewish**:
  o Organizations either connected to a synagogue or with significant overlapping board membership to the local federation are considered substantially under the care
  o Strongly affiliated included Federation member agencies with fewer ties to Federation leadership
  o Independent organizations are those not connected to a synagogue or Federation.

❖ **Catholics**:
  o Institutions directly under the archdiocese, parish or order are considered substantially under the care
  o Agencies with a formal relationship once removed through an intermediary organization are strongly affiliated
  o Those with no current legal relationship are considered independent.

❖ **Mainline Protestants, Quakers and African American churches and mainline Protestant dominated interfaiths**:

- o Substantially under the control includes organizations either without a 501c3 (but separate bank account) or where the congregation has direct control.
- o Strongly affiliated means that non-profit by-laws stipulate a formal connection through board appointments or other mechanisms.
- o Independent organizations were founded by the faith, but have no current formal relationship in their by-laws.

- ❖ **Evangelical** organizations were harder to categorize.
  - o Those integrated into their founding congregations easily fell into substantially under the care.
  - o Strongly affiliated have current strongly defined networks among individual evangelicals.
  - o Those in the independent category had similar networks, but these were more diffuse and included connections through name recognition. Those in the independent category were also larger than those in the other two categories.

In practice, these categories only indicate formal relationships and we have found actual connections to founding faiths far more complex and multi-layered. First, informal connections persist and prove far more important than legal relationships. Informal connections include a wide array of practices from board members talking about the organization in their faith community, faith community members volunteering or using the organization, people served attending events related to the organization in the faith community or joining the founding faith, or simply faith community members commenting on the organization at community events or in community media. More important, we are finding that the quality of the relationship to the founding community is not determined by its legal relationship, percentage of board members appointed by the founding faith or other definable criteria. We have purposely included organizations with both good and conflicted relationships with their founding faith communities, finding that relationship quality varies across all of the categories and shifts over time.

The report next explores how these varying relationships are defined by practical theology and the three general systems we outline in the introduction. The remainder of the report describes how practical theology and system strategies influenced stewardship of the non-profits that participated in the study and responses to opportunities and concerns both faith communities and organizations encountered during the study. We draw on analysis and examples from data collected through the various methods described here. Quotes come from a combination of interviews, written materials and observations.

Organization Matrix, Faith and Organizations Project Pseudonyms
Phase I: Initial detailed research

Phase 1: East Coast site	Mainline Protestants	Evangelicals	Catholics	Quakers	Black Church	Jews
Faith Community focus entities	*Congregation or congregation clusters/coalitions* Frankford GM Churches Severna Park Churches Disciples of Christ Baltimore Lutheran church network	*Congregation or congregation clusters/coalitions* Heritage Community Church	*Archdiocese, Order, possibly parish* Ascension Hospital System Daughters of Charity School Sisters of Notre Dame St Mary's Parish* Archdiocese associated with agencies and schools*	*Monthly Meeting, Quarterly Meeting or Yearly Meeting depending on organization* Baltimore Yearly Meeting *Rock Creek Monthly Meeting Friends Services for the Aging Central Philadelphia Monthly Meeting Friends Council on Education	*Congregation or congregation clusters/coalitions* Union Baptist (John) Cookman Cluster churches Northwood Appold UMC Union Bethel AME Church	*Federation* The Associated: Jewish Community Federation of Baltimore Chizuk Ammuno synagogue
Substantially under the care of the faith community	Disciples of Christ programs-Kaleidoscope	Annapolis Area Christian School	Saint Mary's Parish School* Georgetown Prep	Friends Meeting School Friends House Sandy Spring	Union Baptist Church, Head start and housing programs *Cookman cluster youth organization	Jewish Community Center of Baltimore Krieger Schechter Day School Chai

	Severna Park Assistance Network (SPAN)	Chesapeake Christian Center	Ascension hospital system	*Heather Hills Retirement Community	Northwood Appold Healthy Marriage Program	Jewish Council for the Aging
Strongly affiliated with the faith community	Frankford group Ministry GEDCO	*Urban Center	St. Agnes Hospital Caroline Center	*Rock Creek Friends School *Quaker Senior Services	Union Bethel AME WAFCDC	
Independent organizations affiliated with a particular faith community	LIRS	*Charitable Christian Fellowship (CCF) *Pregnancy Help Center	*Catholic Assistance DC St. Ambrose Housing	AFSC-Middle Atlantic region Center City Crime Victim's Services	Northwood Appold Community Academy Project Garrison	Yachad

* Pseudonym

Practical Theology

Practical theology means *the formal and informal mechanisms a community uses to enact its theological teachings through its religious culture and structures.* Practical theology changes over time and varies across regions as well as among religions and denominations. Sometimes practical theology varies among faith communities in the same denomination. Practical theology includes both explicit use of faith such as quoting theological statements or scripture, religious symbols, and religious based practices associated with governance. More often, practical theology is embedded in the culture of organizations and the particular nature of the relationship between faith communities and the organizations they have created. This section compares practical theology across the religions and denominations in this study. Sections on each religion or denomination in volume two of this report provide more detailed discussion of practical theology and stewardship for that particular faith.

Among the major Christian groups in the U.S., Catholic adherents are the most numerous (62 million), followed by Evangelicals (40 million) and adherents to Mainline Protestant denominations (26 million) (U.S. Membership Report, Association for Religion Data Archives, 2000). Looking at the unit of congregations rather than individual adherents, Evangelical churches account for about half (53%) of all congregations (of any religion), Mainline Protestant churches about a quarter (26%), churches in historic African American denominations 7%, Catholic and Orthodox churches 5%, and Jewish synagogues 1% (Ammerman 2005).

Mainline Protestants

While there is significant diversity in the various denominations represented in Mainline Protestantism, and among the churches within each denomination, a number of studies have documented their overall "this-worldly" orientation and active public presence. A national study of congregations summarizes their involvement (Chaves, Giesel and Tsitsos 2002, 122-123):

Mainline congregations are more likely to engage in and encourage activities that build connections between congregations and the world around them. They are more likely to engage in social services, encourage educational activity (except sponsor their own elementary or high schools), interact with other congregations across traditional religious boundaries, and open their buildings to community groups. Mainline congregations appear more likely than congregations in other traditions to act as stewards of civil society rather than as one component of civil society.

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Mainline Protestants' active role as "stewards of civil society" has historical and theological roots. Protestantism enjoyed a position of prominence in American culture and civic life in the eighteenth and nineteenth centuries, producing educational institutions, hospitals, social work organizations, and cultural organizations. Protestant church buildings often occupied the literal and figurative center of the community, drawing on historical precedent in the Puritan ideal of a "city upon a hill." (Wuthnow and Evans 2002; Demerath et al 1998).

The practical theology associated with Mainline Protestantism emphasizes tangible demonstrations of God's care for the poor and vulnerable as an expression of spirituality. Serving others is an act of obedience to God. These themes reflect the ongoing influence of the Social Gospel movement of the early twentieth century, which called Christians to advocate for social justice and support programs of outreach for the poor as a central tenet of faith. Embedded in many social programs is the belief that God's Kingdom of justice, reconciliation and social harmony can, to a meaningful degree, arrive in history as a result of human efforts. While Christians are uniquely called to this effort, the scope of the need calls them to join with like-minded others.

Many of those interviewed for this study cite Jesus' teachings, including his parable in Matthew 25 which asserts that caring for the poor, hungry and oppressed is akin to caring for Christ himself. Organizations founded by Mainline Protestants typically carry a "sense of embodying God's presence in service to the poor …even when they do not talk openly about their faith" (Ammerman 2002). Overall, Mainline Protestantism tends to be less focused on personal conversion as a motive for outreach than Evangelicalism. Evangelism—persuading others to profess Christian faith and join the church—is not absent, but tends to be implied rather than explicitly verbalized, and to be subordinated to acts of service and advocacy. Personal faith is largely considered a private matter, though it leads to public engagement (Wuthnow and Evans 2002). Thus when Mainline Protestants from various denominations come together to advocate for national health care reform, they would tend to focus on their shared social goal, while rarely making explicit their individual religion's motivations or discussing differences in beliefs. For example:

> *I absolutely believe that this is a Christian organization and all that we do is based in the Christian faith. Although what I have also found out in working with the Interfaith is that it also totally aligns with all of the Abrahamic faiths and as I continue to learn about other faiths, with other faiths as well. So I think that we all have that common calling to reach out to the poor, change the world, transform neighborhoods—all that comes from all of our faiths, not just Christianity.*

Mainline congregations tend to fall more toward the progressive or liberal side of the theological spectrum, though congregants tend to be more politically conservative than their leaders—creating tensions on some social issues (Steensland 2002). Some mainline denominations also experience a disconnect between the understanding of social ministry at the grassroots congregational level as personal acts of service and relief, and a greater emphasis on public policy advocacy and structural reform at the level of judicatories and denominational offices. In part, this reflects the theological tension between the ethic of personal responsibility, a value deeply woven into the historic fabric of American Protestantism, and a critical awareness of economic and political injustice as represented by the prophetic tradition in Scripture. This dual understanding of sin as both personal and structural presents a common bond in particular with the African American faith community (Lincoln and Mamiya 1990).

Differences in church polity influence how different churches within the Mainline Protestant community respond organizationally to social justice issues, and how church leaders are involved. In some denominations, such as the Presbyterian Church USA and the Disciples of Christ, ministers are "called" or hired directly by the church, and the pastor's community involvement will generally reflect the priorities of the congregation. In others, such as the United Methodist Church, ministers are assigned by the denomination to congregations for variable lengths of time, and part of their assignment can be to provide leadership to specific ministries, such as the example of Frankford Group Ministries where the executive director was a pastor assigned to the organization. Mainline Protestant polity generally provides for a congregational leadership body that conducts the business of the church, such as the Session of elected Elders in the Presbyterian Church (USA), or the elected Board of Members in the United Methodist Church. In principle, any social outreach a church commits to has been voted on by the church leadership, which gives it official sanction. Pastors in most Mainline churches cannot venture on their own to begin a social outreach ministry without first seeking official congregational support.

Although Mainline denominations have a variety of organizational forms and polity, a notable feature is the use of national structures through regional conferences and associations. Similar to Catholic and Jewish structures (and in contrast to many Evangelical congregations), Mainline Protestant congregations typically contribute to their denomination's centralized budget and social service systems. Certain types of services are commonly addressed at the national rather than the local level, such as international aid, disaster relief work, and refugee ministries.

The Lutheran Immigration and Refugee Services office in this study was an example of this strategy. Despite the organization being chartered at the national level, it still saw individual congregations as a major component of its work. Using significant federal funding, LIRS passed funds through to regional offices often located within Lutheran Children and Family Services (LCFS) organizations, also chartered at the synod level for the region. Both the national and regional offices rely on individual congregations to host refugee families, with fundraising campaigns sent to individual congregations as well.

Nancy Jagelka ©

Their theological emphasis on solidarity with the poor in praxis for the common good often leads Mainline Protestants to join with others in service and advocacy across denominational or interfaith lines. Nancy Ammerman (2002) found that Mainline churches provide volunteers, space, and funding for about twice as many organizations as Evangelical, Catholic and African American churches, and are also the most likely to connect with secular nonprofits and government agencies. This cooperative work includes public policy issues like national health care reform, disaster relief work, and ecumenical or interfaith umbrella organizations such as SPAN and GEDCO. Many congregations also participate in local chapters of national initiatives like Habitat for Humanity. This tendency toward centralization and collaboration streamlines resources and prevents duplication of efforts at the local congregational level.

Members of Mainline Protestant congregations tend to be higher educated and to enjoy higher socio-economic status than the general population, and also tend to be older than the average U.S. adult population (Wuthnow and Evans 2002). Membership trends among many Mainline groups have been affecting outreach. Six Mainline denominations (Episcopal, Moravian, Congregational Christian Church, Presbyterian Church USA, United Church of Christ and United Methodists) have had negative growth rates (U.S. Membership Report, Association for Religion Data Archives, data for 1980-2000). This trend has been resulting in smaller, often aging congregations, and fewer human and financial resources available for social action. This tendency led Frankford Group Ministry to close toward the end of the study because its four congregations no longer had the membership and resources to sustain the organization in an economic downturn. Despite these changes, the Mainline Protestant faith community continues to provide a considerable volume of charitable relief and social services, and to exert a significant influence on public life.

Evangelicals

With 40 million adherents, Evangelicals are the second largest religious group after Catholics; conservative Protestant churches account for about half of all American congregations (U.S.

Membership Report of the Association for Religion Data Archives, 2000; Ammerman 2005). The Evangelical label encompasses a spectrum of Protestant denominations or independent congregations that share a set of key beliefs, chiefly relating to the centrality and authority of Scripture, the call to personal salvation through faith in Christ, and the mandate to share faith with others. In the last half-century this doctrinal orthodoxy has overlapped (though is not synonymous) with political and social conservatism, and has ties to (though again, is not synonymous with) fundamentalist Christianity. Pentecostal / Charismatic Christianity shares many of the same core doctrinal beliefs, with additional emphasis on the dynamic role of the Holy Spirit in directing the spiritual life and behavior of Christians. While many African American faith communities have an evangelical theology in areas such as Scripture, personal salvation and the centrality of Jesus Christ, African Americans tend to relate this faith to their understanding of society and their practice of the social mission of the church in quite different ways (Lincoln and Mamiya 1990; Emerson and Smith 2000; McRoberts 2003).

Evangelicalism is not a structure as much as an evolving movement (McGrath 1995). Evangelical Protestantism gained momentum in the 19th century following a series of revivals that swept the country. A surge of spiritual fervor fueled a slate of ambitious social movements: abolition, temperance, relief agencies for immigrants and urban dwellers, orphanages, child labor laws, prison reform and other moral causes. The practical theology rooted in this era linked spiritual conversion, personal piety, and "an enlarged benevolence," in the words of one evangelist/abolitionist. This benevolence found organizational expression in a host of overtly religious voluntary societies. But in the early 1900s, as the Social Gospel grew more prominent and (from an evangelical perspective) increasingly liberal, an evangelical group broke completely from the tradition of social activism, in a move that became known as the Great Reversal. Evangelicals did not withdraw from the world, but channeled their engagement more narrowly into sharing the message of salvation, as illustrated by a famous quote from Dwight L. Moody: "I look upon this world as a wrecked vessel. God has given me a lifeboat and said to me, 'Moody, save all you can" (Unruh and Sider 2005; Smith 1957).

Whereas Mainline Protestants affirm the potential for realizing the kingdom of God on earth, many Evangelicals believe that only Christ's return will set the world right. Evangelicals are thus divided in their approach to improving social conditions: some believe that all efforts at reforming a "wrecked vessel" are futile, and humanity's only hope is for the world to come; others believe that God has entrusted Christians with stewarding God's human and natural creation until the King's return. Given the emphasis on personal, experiential relationship with God, Evangelical social service initiatives often are inspired or sustained by a strong sense of spiritual calling. As one Evangelical woman engaged in outreach in the study commented, "I felt called by the Lord, and then things just sort of happened."

While encouraging others to experience personal salvation is a core Evangelical value-- three-quarters identify leading others to conversion as a priority goal of their faith (Ammerman 2005)—there are a wide range of strategies for achieving this goal. Some Evangelicals regard evangelism as the primary mandate, viewing social service either as a distraction from that priority, or chiefly as a means to that end. Other evangelicals seek a "holistic" approach, pursuing both evangelism and social action as equally valid, Scripturally-based practices. In some cases, these may be pursued as separately organized outreach initiatives; in other cases, the ministry may regard humanitarian service as incomplete if the person being served is not invited to share in the faith of the social ministry sponsors and/or to join the sponsoring worship community. One example is the Blessing Room at Chesapeake Christian Center (Church of

God), which provides free clothing and a food panty for the poor, while also encouraging clients who come for services to give their lives to Christ.

Evangelicals are more likely, on the whole, to stress religious experience and conversion than Mainline Protestants (with 63% of conservative Protestants and African American church leaders naming evangelism as extremely important to their church versus 17% of Mainline Protestants, according to Ammerman's 2005 *Pillars of Faith*). Yet the perception that there is a clear demarcation between social ministries and evangelistic activities among all Evangelical congregations is not supported. These orientations are not an either/or choice. Unruh and Sider's (2005) research and literature review suggests that evangelical congregations are increasingly likely to address *both* the perceived need for spiritual transformation and relationship with Christ along with the need for practical relief and social transformation. Younger evangelicals in particular appear more likely to express support for a broader agenda of social change that includes, for example, creation care and poverty reduction alongside more traditional Evangelical concerns and activities. Regnerus and Smith (1998) along with others have dubbed this trend the "reversal of the Great Reversal." Anglo Evangelicals on this path are rejoining African American Evangelical groups, which typically have embraced both personal salvation and social change (Emerson and Smith 2000).

Another feature of Evangelicalism with relevance for community involvement is the strong current of individualism, tracing all the way back to the Reformation, tying into the contemporary theological and cultural themes of personal relationships and religious freedom (Smith 1998). Evangelical ministries – with the exception of African American Evangelical groups -- are more likely to focus on serving and equipping individuals over advocacy for structural reform (except on selected issues such as abortion). Evangelical programs also often have an underlying goal of building personal relationships alongside the provision of goods and services; these relationships open channels of communication and trust for sharing faith.

This individualism extends to the decentralized polity of many nondenominational, independent and congregational churches that emphasizes local autonomy over vertical linkages. This may be one factor in why Evangelicals form many organizations, but belong to few umbrella institutions compared to other religious traditions (with the exception of the National Association of Evangelicals and other groups wholly within the Evangelical community). The theme of individualism also contributes to the important role that visionary leaders and religious "personalities" (such as Billy Graham) often play in the Evangelical community, in contrast to investing trust in particular offices or positions as is the case in some other religious traditions.

Given these characteristics, the social service component of Evangelical congregations in this study tends to be smaller, more independent, and more leadership-driven than is commonly the case in Mainline Protestant congregations. Evangelical organizations in this study are also less inclined to join interfaith service networks. However, some evangelical megachurches have extensive and professional service outreaches, and multi-national organizations such as Compassion, World Relief and World Vision have developed extensive ties to congregations

and nonprofits in the Evangelical community.

Volunteerism and Social Service Programs Compared

Several studies have found that members of Evangelical congregations are more likely to volunteer their time than Mainline Protestant members or Catholics (Smith 1998, Wuthnow 2004). However, Protestants who self-identify as evangelical (along with Catholics who self-identify as "traditional") appear to report the highest percentages of volunteering *within* a congregation. When it comes to community organizations outside the church, members of Mainline Protestant congregations are more likely to volunteer (54%) than members of Evangelical churches (46%) (Wuthnow, 2004 reporting from the Religion and Politics Survey, 2000). That said, we found that independent Evangelical organizations tend to draw other Evangelicals interested in volunteering to support a particular cause. For example, the following quote is from an independent, interfaith organization founded by a Catholic lay person with Evangelical leanings that draws supporters from both the Catholic church and Evangelical communities:

> *For anybody here, whether it's a board member, whether it's a volunteer, whether it's a staff and I don't know if Evangelical would be the correct word as long as that also would include some of the Catholics, in other words, I'm not sure how you guys define that exactly, for us what it means is that anybody interested in being involved here has to be able to state their personal faith in Jesus Christ as Lord and Savior and how they will be able to share that with someone else and that will include not only Evangelicals but Catholics in that sense, not that all Catholics would be able to necessarily state that, the same thing is there would be other people in different denominations that might not be able to, but yes, that's what we mean, that's our definition.*

Similarly, Mainline Protestant denominations are more likely than Evangelicals to sponsor community-serving programs that serve non-members. Chaves (2004, p. 53) found that "Congregations in denominations that are described by their leaders as theologically liberal report participating in or supporting two more social service programs on average than congregations that are described as theologically conservative." Religious affiliation thus appears to influence both the likelihood and the amount of service directed toward the community. However, it should be noted that many factors influence service provision, such as congregational size, region and location, and relationship to the local community, as well as religious tradition or culture (e.g., Chaves 2004, Wuthnow 2004; Cnaan & Boddie 2001; Dudley and Van Eck 1992).

Catholics

Catholic theology is similar to Mainline Protestant theology in terms of social justice and political advocacy, and many Catholics individually involve themselves in political issues like environmentalism, poverty relief, and prison reform. However, the Catholic Church directly sponsors schools, health and social services. For example, the Church and the religious orders support Catholic Social Services/Catholic Charities, other social service organizations and a variety of hospital systems.

Interestingly, the original goal of these various Catholic Church organizations was salvation of souls and meeting people's actual needs was only secondary. Early hospitals did not cure people; they were places where the sick could be helped to prepare for death by confessing their sins and receiving the sacraments. This mindset regarding health care persisted all the way up to the late 19th century, when medical advances made it possible that hospitals might help the ill regain their health (Wittberg 2006). However, over time Catholic social service organizations developed into highly professional services. A client may realize that he or she is being served by the Catholic Church because of the presence of a prayer chapel and prominent Crucifixes, but the actual social services are provided by professionals and largely free of direct religious influence. For example, Catholic Charities DC, the large social service entity in this study, currently receives over 65 percent of their funding from government.

Catholicism has always seen helping the poor and the sick as essential to the calling of Christ as articulated in Matthew 25: only those who feed, clothe and tend Christ in the poor will enter the kingdom of heaven. With regard to social services, Catholicism originally taught a similar doctrine as Buddhism and Islam do today: to give to the poor was to increase one's own merit for salvation. Beginning in the late 19th century, however, Pope Leo XIII's encyclical "Rerum Novarum," inaugurated modern Catholic Social Teaching. Since then, Catholics have been enjoined to not merely meet the physical needs of the poor, but also to work for economic and social justice.

Catholics in 19th century United States viewed public education with great suspicion, since it was primarily Protestant in nature. Also, many Catholic immigrants wished their children to be educated in their own language and culture. U.S. Catholics therefore built the largest religious education system in the country, or, indeed, anywhere in the world. Today, the need to protect children from heresy is less salient in most Catholic school systems, but there are some academies and colleges that have been recently founded for this reason, and whose faculty and students see mainstream Catholicism as too secular (Wittberg 2006). Most Catholic schools today, emphasize the need to care for the poor and to work for social justice as a prime characteristic of Catholicism. The two grade schools in this study reflected Catholic values and expected students to perform some services for the poor. This study also examined one Catholic Prep school whose student body is between 70-80% Catholic, but does not focus on evangelization. In general our study showed the Catholic schools encourage students to find their faith, but do emphasize the traditions of the Catholic Church.

Quakers

The Religious Society of Friends (Quakers) developed as a small sect in 17th century England that abjured the traditions of the established Church, including all forms of formalized religious service, outward forms such as Baptism, and the celebration of the Christian holidays. Instead, individuals worshiping in small communities called Meetings wait for messages from God. Quakers have also always believed that "there is that of God in everyone," leading to "work in world" to support people from all groups, particularly those who are marginalized. The Quaker practice of recognizing "that of God in everyone" and their commitment to equality led to core testimonies of peace and non-violence and a radical rejection of authority and hierarchy that has led to early activism in the abolition of slavery, promotion of civil rights and full social and political inclusion for former slaves, native populations, the poor, women and immigrants.

Originally firmly based in individual reinterpretation of the Protestant scriptures, the liberal, unprogrammed Friends Meetings that participated in this study now welcome members from many religious traditions, with an open theology that encourages incorporating belief systems from Jews, Buddhists, Hindus and many other world religions and spiritual practices. However, early on, Quakers also developed systems to ensure that individual beliefs or leadings to pursue a particular spiritual activities or social welfare/justice activity came from God and fit into the general culture and beliefs of the local Meeting. Individuals only join Meetings after a clearness committee of established members discerns through worship that the potential member shares the core beliefs of the Meeting, is personally guided by God to join, and the entire Meeting community has agreed to accept the person as a member in a Meeting for worship for the purpose of business. Thus membership is generally limited to those that can socialize to the beliefs of established Friends and fit in to the culture of a particular Meeting. This leads to wide diversity of culture and beliefs across Meetings.

The same process of individual and corporate discernment in worship is generally used when individuals have "leadings" to develop a peace or social justice activity. As such, while Quakers have developed a number of forward thinking programs on wide array of topics, new ideas must be "seasoned" through clearness committees and allowed to move forward only with the approval of the entire Meeting. That said, individuals have formed organizations outside of this Meeting process, such as American Friends Service Committee (AFSC), or taken ideas to other Meetings if they were not accepted in an individual's home Meeting.

Quakers have no formal creed, but share central testimonies of simplicity, equality, integrity, non-violence, and seeking God in everyone. This guides both worship and work in the world such as in development of non-profits involved in social service, education, health and senior services. Practical theology is embedded in the practice of corporate discernment in worship and decision-making is consensus-based, predicated on finding a path that all members can agree on through a common "sense of the meeting." Practical theology of integrity has led to open and honest business practices, with an emphasis on clear financial statements and plain dealing. Other testimonies of non-violence, simplicity, and equality vary widely and have changed over time.

Some major components of the Quaker faith that direct their efforts toward social justice and social service are; an emphasis on experiential religion, belief that all members are vital members of the religious community and are called to faith, commitment to equality and respecting the beliefs, values, and life-ways of everyone, regardless of race, religion, ethnicity, gender or disability, and a central value of living in peace and creating a peaceful world. Quakers are directed to be politically active as they seek to transform their world to a place that is oriented towards greater peace and justice.

Most established Quaker organizations were created by the leading of one or two Friends (Quakers) who develop ideas into institutions, gathering the support either from their Meeting (congregations) or like minded Friends. Unlike the Evangelical community, these leadings generally do not move forward without the support of a Meeting. These leadings have included innovative approaches to mental health, prison reform, and a variety of social justice issues such as anti-slavery initiatives, peace work, and other social justice activities. For example, the American Friends Service Committee (AFSC) is an example of a Quaker organization that has supported peace and justice efforts. AFSC is largely independent from the Meetings and has set up its own organizational protocols and business structures. Quaker schools are generally more

connected to Meetings; although a great many of the students who attend the schools are not Quaker. Many Quaker organizations initially develop to employ and serve Friends (Quakers), but evolve into institutions largely serving others, with few Quakers as employees. A prime example of how Quaker Organizations are formed and sustained is:

> *For instance Raymond Wilson wanted to start the Friends Committee on National Legislation. I think he was pretty much just him who then expected other people to think that it was a good idea to support and make it happen. I think a lot just comes up in the heart of a single individual and is then able to claim the attention of other Friends so they say, "This sounds important. We want to make it happen."*

Quakers also place a great deal of emphasis on education and have Quaker schools that educate children pre-K through 12th grade. Quakers initially formed schools exclusively for Friends to maintain the culture of the founding religions, but by the 19th century, most Friends schools served a majority of non-Quakers. Friends also formed schools for African Americans, native Americans and other marginalized groups early on or included people from these groups in their own schools. The schools are generally "under the care" of one or two Meetings which help maintain ties to the practical theology of Friends. Many are located on the same property or near their sponsoring Meetings. In addition, an umbrella organization called Friends Council for Education provides materials on Friends practical theology and a common network for school staff and board members.

Jews

Because education and supports are seen as the responsibility of the entire Jewish community, Jews and their organizations present a strong contrast to Christian strategies to maintain relationships with their non-profits. Because Judaism is understood as both a religion and an ethnic group, the community is defined not just as Jews who actively practice their religion, but cultural Jews who share values and Jewish identity, but are not religious. Jewish religious traditions state that anyone born of a Jewish mother is Jewish regardless of how they are raised or belonging to another religion. Outreach to "unaffiliated Jews," or those who have no attachment to the religious or wider Jewish community and its institutions, is an increasingly more important goal as most U.S. Jews assimilate into the wider society, and the organized community fears "losing" Jews as they intermarry or convert to other religions.

Jewish theology of support for those in need, charity and justice comes from a combination of the Torah and the Talmud, and is reinterpreted regularly in Jewish communities and their institutions. In Jewish thinking, justice and charity are merged in dual concepts. Three key concepts embody Jewish philosophy on social welfare: tikkun olam (to heal the world) chesed (loving kindness) and tzedakah. While the Hebrew tzedakah roughly translates as charity, the concept more accurately combines charity, justice, and righteous duty.

The United States Jewish community primarily comes from European roots where until the 19th century most Jews were forced to live in segregated communities or their means of livelihood and ability to own property was limited. As such, Jewish communities evolved into closed enclaves within the various nation states where they were allowed to live, providing supports exclusively for each other in organized communities. While the religious freedom of the United States did not require the same structures, Jews quickly developed independent social welfare, health and educational systems both to ensure that they were not seen as a burden on the

wider society, to avoid anti-Semitism, and to prevent Jews from being converted to Christianity in the predominantly Protestant systems.

As different waves of immigration developed their own institutions, Jewish communities increasingly sought community-wide systems to cut down on duplication of services and the redundant multiple fundraising events that evolved to support each separate system. Most large to mid-sized communities had developed community wide funding and planning systems by the early 20th century, which gradually evolved into Federations that now aim to serve as comprehensive fundraising, planning and centralized support structures for local communities. Given the increasing diversity within the religious communities, Federations exist separately from the synagogues and generally attempt to provide a big tent environment where Jews of all backgrounds can work together to support their community.

While most of the institutions supported by these systems were originally designed to serve Jews, most of the social service entities now also serve the broader community. Dual responsibility to support Jews as well as the world at large is part of the practical theology of most Jews. For example, the Conservative day school included as one of its religious practices a requirement that students bring donations each week, then decide as a group where the money would be given. Targeted causes alternated between Jewish institutions and those in the wider world like a homeless shelter or the local volunteer fire company.

Jewish organizations also differ from some other religious organizations because Jews value educated staff who can provide professional services. Providing the highest quality service through professionals is seen as a Jewish value. As several people mentioned, the highest blessings (Mitzvot) is to provide quality supports that will help the person in need so that they can become contributing members of society. This is a reinterpretation of a saying from a key Talmudic teacher that "The highest form of charity is to help someone to a lucrative position."

 Instead of seeing professionalization as secularization, Jews have developed Jewish communal service graduate programs to ensure that their professionals understand both the religious roots and latest practices within their professions.

In addition to the Federation system, U.S. Jews have created a network of umbrella organizations for the Federations (United Jewish Communities) and various types of non-profits. For example, there are national professional organizations for the Jewish Community Centers (JCC), Jewish family or social service organizations, Jewish vocational organizations. The synagogue based school in the study belongs to the U.S. network of other Solomon Schechter day schools.

These professional associations provide places to learn best practices, share strategies, and network for new employees. For instance, the director of one of the JCCs in the study commented that the national JCC umbrella helps identify candidates for open executive positions. Many Jewish organizations receive significant government funding because they provide a wide variety of social services to the general population with specific needs.

Traditionally, Jewish education in the U.S. consisted primarily of after-school religious education and home traditions. While Jewish day schools have always existed and proliferated in recent decades, the vast majority of Jews have educated their children in public and private schools for the wider community. Most attend public and non-Jewish colleges and universities as well. Today, the Jewish community sponsors institutes for Jewish education and supports day and afternoon schools through a combination of Federations, synagogues/temples and general community support.

African Americans

Historically African American churches have been the centerpiece of African American culture, and social reform has always been a major focus of its theology, alongside evangelism and spiritual discipleship. Thus, many African American pastors will speak fervently about the need for Jesus, but also talk about the fact that African Americans continue to be discriminated against in society. It is difficult to separate out politics from African American churches, because African American Pastors are active politically speaking out against broad injustice and the particular injustices of society against African Americans. Theology varies from church to church and pastor to pastor. African American pastors are very independent. Like Mainline Protestants, polity differs across denominations. The AME denomination, for example, appoints pastors and maintains higher level adjudicatory structures as do the Episcopal and Methodist denominations, while National Baptist churches select their own pastors and operate at a more congregational level.

An example of this culture can be seen in the relationship between one inner city church in this study and their African American Pastor. The church has a long history of political activism in the community and continues to attempt to influence City Council elections and Maryland

politics. The church also sponsors a Head Start program, which is largely fee for service federally funded. The Pastor also attempts to blend together the Holy Spirit, political activism and social services. This combination energizes his church as they continue to reach out.

African Americans have a mixed response to education. Historically, African American pastors may be highly educated, or they may have almost no formal education. Much of this is because overt discrimination made theological training one of the only pathways to advanced education for African Americans. At the same time, African Americans traditionally were forced to enter the blue collar trades at higher rates than whites because of racism. Generally, African Americans value higher education and many historically African American churches, such as the African American Methodist Episcopal Church are demanding that pastors earn an advanced degree. African American theology is not opposed to higher education, but cautions against education that moves people away from Christ. The various charter schools, head start programs and other educational initiatives sponsored by the African American churches in the study were motivated by concern about the quality of education and enrichment available for the local community and a sense that faith communities should play a role in offering high quality education that reflected their values.

Embedded vs. Explicit practical theology

Our research also revealed significant differences in the ways that the various faiths used God language and included faith-based messages in their programming. The pilot study suggested that organizations could strongly rely on their faith traditions without exhibiting any of the open expressions of faith that most typologies use to identify an organization as faith-based. In fact, several of the organizations that clearly follow through on religious teachings in their programming declared that they "were not faith based" because they associated being a faith based organization with being a clearly religious organization that used biblical language and proselytized. Organizations appeared on a continuum from Jews, where religious values were often embedded in organizational practice but rarely mentioned in programming or materials to Evangelicals, where most aspects of programs were suffused with explicit religious expression. In general, religions that see faith as individual commitment, such as the Evangelicals, African Americans and some Mainline Protestants, were more likely to use expressive language while religions with strong focus on communal religion by birth or commitment such as Jews and some Catholics used fewer references to faith in their organizations. Thus the more institutionalized religions often relied on more embedded forms while congregational denominations used more expressive forms.

In addition, the pilot study suggests that those religious traditions that strongly emphasize religious tolerance and a positive appreciation for diversity tend to embed their religious commitments more implicitly within their service organizations, rather than making those commitments explicit. This appears to be driven by a desire to avoid imposing religious views on others, independent of other factors analyzed here (Schneider, Day, Anderson 2006).

The notion of embedded theology refers to unstated values and/or expressions that may not be vocally articulated, but define the particular faith community. While there is great diversity among Mainline Protestants, in general, this community shares certain long cherished values such as free speech, religious tolerance, equality, social justice, and strong support for education. Moreover, in general, Mainline Protestants share certain values and assumptions in relation to worship. However, what is explicit in the Mainline Protestant community is often debated, with denominational headquarters assuming certain values are explicit only to find that

some local churches do not agree. For example, SPAN often struggles with the fact that embedded values once assumed to be "given" are changing as the Mainline Protestant community evolves. While most volunteers at SPAN would not overtly evangelize clients, some volunteers are open to the idea.

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Social service programs within the Mainline Protestant church have very few explicit indicators that the organization is a Christian organization. Most Mainline Protestant spin-off organizations may operate out of a church or on the church property; however, other than location, the program may not advertise the fact that they are Christian. Clients that are served by these organizations may recognize it as a Christian agency because of its location and/or symbols and/or language on the walls and/or in the professional literature. However, there is little use of explicitly Christian language in interactions with clients. For example, volunteers at SPAN typically do not pray before opening the facility and do not pray and/or have religious conversations with a client. These practices reflect the embedded value of human dignity, which is interpreted in the Mainline Protestant context as the unspoken rule that organizations should not attempt to overtly convert clients.

The religious culture of Mainline Protestantism is embedded in the governance and service structures of these agencies, with individual congregations appointing board members and a heavy reliance on volunteers, in-kind or individual donations solicited through congregations as a means to support the programs. Although generally, the volunteers at these organizations are not professionally trained social workers; they are expected to conform to the professional ethic of social workers and not seek to impinge their own beliefs upon the clients.

Because Evangelical theology seeks to apply the teachings of Scripture and the believer's personal relationship with Jesus to all of life, the culture of the Evangelical community is rich in explicitly religious language and practices. These explicit elements may be formally incorporated into the program, or an informal byproduct of evangelical culture. Evangelical speech uses many terms that are loaded with meaning to "insiders" but may not be immediately understood by those outside the Evangelical community. This comment by one Evangelical woman to the interviewer provides an example of explicit religious speech: "I have been saved and I feel led to fulfill his will to bring others to Christ. You know the Lord?" Not surprisingly, much of the same language and practices can be found in organizations associated with the Evangelical community. Some organizations even function as an alternative worshiping community for their staff and sup porters, with practices such as shared prayer, Bible studies or chapel services reinforcing the common religious culture.

One embedded value in Evangelical ministries is individualism, which is reflected in the key role often played by individual leaders in founding and maintaining organizations. Unlike Mainline Protestant organizations, which are often governed by or "spin off" from a congregation, most of the Evangelical organizations in our study were founded by ministers or lay people acting independently of the congregational structure (though they may draw on the resources of the congregation). Many evangelical organizations can be described as entrepreneurial in the sense that they develop through the initiative of individuals in response to a need. Religious liberty is another key value. The freedom to operate according to the dictates of religious conscience and "calling" is valued over institutional stability. Thus the Urban Center tells of "miracle stories" of obtaining support that underline their direct dependence on God, rather than established funding mechanisms.

A related value is an emphasis on personal relationship. Evangelical ministries often follow a strategy of "relational evangelism" (Unruh and Sider 2005), in which Christians seek to develop relationships with people that open lines of communication and trust for sharing faith and encouraging conversion. Thus one of the main goals of the Christian Fellowship's Kindness Center is "to bring participants into a closer relationship with Jesus Christ as Lord and Savior." The women who operate the Blessing Room would spend time chatting with the clients who drop by for clothing, and would ask them, "Do you know the Lord?" The practices of cultivating relationships with clients and seeking to influence their faith run counter to the standards of professional social work. This is one factor why Evangelical organizations are more likely to hire people of the same faith, and may be less likely to have professional staff, though many other factors - such as the organization's size, funding sources, and nature of the service provided - also affect staffing choices.

Quakers operate with both explicit and embedded values. The study showed that there is a Quaker ethos in which people who join and become active in the Quaker community are socialized into behavioral standards. Quaker organizations vary in the amount of time and effort they spend socializing outsiders to the Quaker process. When modeling and orientations are less emphasized or less successful the organization may begin to resemble a secular organization. For example, Quaker worship includes extended periods of waiting in silence for divine messages. Thus, patience represents part of their embedded theology and the practice of patience and waiting is very much a part of a Quaker organization. The culture of peace and non-violence often translates into an inability of Quakers to handle people who talk angrily or loudly about a concern or conflict. This may lead to difficulties in resolving conflicts, and vociferous non-Friends on a board may inadvertently dominate processes (Schneider 1999). Another distinctive embedded value is to encourage the participation of everyone. This practice

differs from Mainline Protestant or Evangelical organizations in which maximum participation is not demanded.

One of the most distinctive practices in Quaker organizations involves decision making processes. Unlike most other organizations, Quaker organizations do not vote; instead, members discuss an issue until they have come to a "sense of Meeting" or a common understanding on how to proceed that takes into account all of the perspectives that have been offered. Often, a sense of Meeting results in coming up with a completely different alternative than those previously suggested that emerges out of the faithful discernment of the gathered group. This "third way" differs from a traditional consensus because the solution involves either expanding the relevant choices or developing a completely new path that takes into account diverse views. Those who still disagree may state that they will "stand aside," which is the signal that this individual will not block a decision. However, it only takes one individual "standing in the way" to block or table a decision.

Quaker organizations that understand these processes are able to develop innovative "third ways" that draw from the wisdom of the assembled group and talk through disagreements until they are resolved. Boards or other governance processes that are less skilled may try to create a consensus, a middle ground that everyone can agree on, but often come to stalemates due to inability to work through conflict. Chel Avery, a Friend who has advised on Quaker process in several contexts describes the difference between "sense of meeting" and consensus as:

> *In a sense of Meeting the boundaries [for the decision] are expanded until everyone fits in. In consensus, the boundaries are made smaller and smaller until the group finds the specific elements they can all agree on and the decision is based only on those common elements.*

Another explicit practice is for business meetings to begin with silent worship and carry through business as a worship experience, settling into silence after decisions or when a decision is not clear. The length of the silence is unwritten, reflecting the specific culture of the organization. Organizations following the form but not the spirit of this practice are more likely to observe a "moment of silence" at the beginning and end of the meeting, but spend their intervening period in discussion that more closely resembles a secular organization.

Catholic organizations vary widely in how theology and values are embedded in their culture. Hospitals and social agencies serving a primarily non-Catholic clientele are generally less overtly Catholic than the grade and high schools whose students are primarily Catholic. Governmental funding and standards also play a part in the tendency to embed Catholic identity. The Second Vatican Council encouraged Catholic organizations not to advertise their Catholicity very strongly. This was seen among workers at two Catholic organizations who refrained from mentioning Catholicism so as not to offend their non-Catholic clients. Still, organizations like Catholic Charities do have significant informal culture. This can create challenges. For example, an MSW who worked for Catholic Social Services mentioned that until you get used to the culture, it is difficult to practice.

The mission statements and governance structures of Catholic organizations reflect practical theology and culture. Boards tend to be heavily Catholic, with their embedded culture playing out in decision making. Observations in these organizations during the pilot study suggested that these institutions' embedded practices of hierarchical decision making produced little response from lower level employees even when their input was sought by supervisors. Some

Catholic organizations are highly professionalized, and similar to many Quaker organizations, the majority of staff in a Catholic organization may not be Catholic and/or religious.

In Jewish organizational culture the expectations of community-wide support and decision-making practices based on research, planning and good governance are highly embedded. The expectation that community members will support the needs of those less fortunate pervades most of these organizations and their supporting structures. Thus, there is an assumed familiarity and connectedness between and within the organizations. Another embedded value is ongoing debate and discourse from the Jewish community as they attempt to improve practices and policies. Constant questioning is often considered a sign of rudeness in non-Jewish communities, whereas the Jewish tradition of continual inquiry means that questions reveal interest in encouraging the organization to be its best. Whether the organization focuses exclusively on Jews or the wider community is an ongoing topic of debate. For example, a Jewish community leader commented:

> We have a primary commitment to the concerns of the Jewish community, and we're talking about what we started. Some of this became articulated when we completed our strategic plan a few years ago that never really was articulated previously. It was always there. Look, some people might answer this question differently, but I would say, from my own point of view, that we were expressing [the Jewish value of tikun olom] by virtue of concern for the Jewish community.

However, we also saw equally strong embedded values that Jewish agencies should provide a Jewish presence to the wider community, relying on the same explicit theological concept of tikkun olam, to heal the world. In these organizations, an embedded value of NOT making non-Jews uncomfortable by overtly Jewish symbolism led organizations to explicitly appear secular, but clearly state their religious values and identity in internal materials.

Our study showed that over time Jews, like Evangelicals, dialogue and behave in ways that define their culture. Similar to Evangelicals, this way of behaving and interacting eventually becomes second nature. There is also a sense of cultural immersion that takes place in the Jewish community and comes to define being a Jew. One interviewee commented,

> *I would probably have to take time to think about a good definition of that. But I would say that at this point in my life and over the years I have felt an interest. I wouldn't call it an obligation but I think it is more of an interest in volunteering in some capacity and I would hope that that is a result of some Jewish education and Jewish training over my youth and through the years. I can't measure how that happened.*

African American churches are very much driven by both expressed theology and embedded values. What the Pastor says and does and how the congregation reacts are highly scripted not only by the culture of the church, but by the culture of the African American community. There is an unwritten behavioral code that influences the actions and behaviors of people attending an African American church, which sometimes extends to the language and practices found in African American organizations as well.

African American churches frequently develop their own organizations. African American Pastors generally maintain some form of oversight over these organizations. Moreover, the staff of these organizations are more likely to be members of the founding church. These organizations rely more on staff that come out of the founding faith community or local African American community than most other religious traditions except Evangelicals. Thus, many of the embedded values and theology in the faith community are clearly present in the service organization. For example, there is a reverence for the Pastor that is often present in these African American service organizations.

Conclusion

Practical theology directs the faith community as it provides services. Certainly, practical theology directs how a particular faith group decides to develop outreach services. Practical theology also informs strategies for maintaining connections, guiding and supporting non-profits formed by these faith communities to provide education, social services, health services and community development. The remainder of this report describes how practical theology plays out in various aspects of the ways that Mainline Protestants, Evangelicals, Catholics, Jews and African Americans translate their practical theology in their interactions with non-profits they founded. We start by describing the three systems these religions have created as mechanisms to provide social welfare, health, education and community development services. Then, the remainder of the report compares strategies for stewardship and ways that faith communities respond to challenges and opportunities facing their organizations.

Faith Tradition Systems

Both the pilot study and this current connection study identified three different ways of organizing faith based social welfare, health, community development and educational activities: *Institutionalized, Congregational* and *Network Based*. These systems come out of the practical theology and culture of each religion and influence every aspect of how nonprofits and faith communities understand their non-profit activities and organize their work. Identifying systems is important because the best practices, weaknesses, and logic behind non-profit activity are specific to each system. While organizations coming from another system could adapt some approaches from another system for their use, wholesale attempts to use strategies appropriate for another system are unlikely to work because they run counter to the cultural and theological logic behind the founding relationship between faith community and organization. As such, these findings have implications both for public policy and practice.

While we have identified a few organizations that are mixed forms, in general Catholic and Jewish organizations reflect *Institutionalized* systems. Mainline Protestant, Quaker, African American and Interfaith sponsored organizations fell into either *Congregational* or *Network Based* system approaches depending on whether the founders came out of a conventional Protestant or Peace church tradition or a more Evangelical or Pentecostal background. Given that evangelical approaches to justice and charity issues cross denominations, the *Network Based* system approach also includes many initiatives founded by African Americans, Catholic lay persons, and Lutherans.

General Definitions and Characteristics:

Institutionalized

In an Institutionalized system (Schneider, Day, Anderson 2006, Hehir 2002), non-profit activities are managed through centralized community wide structures that play a key role in fundraising, planning, volunteer recruitment, providing training materials on the founding faith tradition, and often centralize ownership of property and back-office activities.

Institutionalized systems evolved from a theology that insists the community/church as a whole is responsible for caring for those in need. This obligation may be conceived as applying only to members of that religion or the world as a whole. In Jewish traditions, key theological constructs include *tikkun olam* (responsibility to care for the world - which sometimes means all Jews and other times means anyone in a particular group) and a series of Talmudic concepts related to an obligation to support the community and those in need within it. For Catholics, key founding theology includes the expectation that Catholics, as the church universal, are responsible both for all Catholics, and by extension all potential members of the church. Encyclicals regarding preferential treatment of the poor, universal health care, etc. that come from the Pope and the Council of Bishops also contribute to the general framework of religious activity.

Major features of Institutionalized systems include:

❖ **Centralized fundraising, volunteer recruitment, training and sometimes facilities management.** In Jewish systems Federations serve in this centralized role, in Catholic systems the Archdiocese, the order or an umbrella system representing several orders

provides the centralized structure. The following quotes provide examples of this strategy:

My program there is specifically funded through, there's a Catholic campaign called Forward in Faith, that was conducted by the archdiocese on the behalf of Catholic Charities and as a result of some of that funding, we've been able to start the program viably.

The [Federation] has been a wonderful resource on the needs of the Jewish community. They have served as a clearing house for information – everything from job descriptions and pay scales to benefits packages and purchasing and what have you.   They have established umbrella operations like the Jewish Volunteer Connection to help all organizations. They have a feature called the Jewish Community Calendar which we are required to use, but actually is a benefit to us and all the organizations. They don't stop organizations from having events on top of one another, but at least you know when you are doing it. They increasingly have been attempting to refer donors to us just as we refer to them.

❖ **Strong tradition of planning at a centralized level for the community or its institutions as a whole.**

For example, three of the Jewish agencies in the study reported that they had been formed after a Federation planning study revealed a need for services related to that issue. One housing organization started independently of the Federation after the Federation decided that addressing this issue was not a priority despite planning study results that identified a need. This organization has no current affiliation with the Federation but draws on the wider Jewish community for volunteers and other supports.

A representative of a Catholic Order sponsored health system reports: *The sponsors delegate the governance and management through [Health System], and as a part of being a member of [Health System] the ongoing operations of the hospital are outlined in a five-year integrated strategic financial plan. ... Then within that the strategic direction that [Health System] has outlined: "Healthcare that works; Healthcare that saves; Healthcare that leaves no one behind." Then with all the enabling infrastructures that are supporting those three initiatives, what are you doing in your local ministry to advance those things in response to your specific community needs.*

❖ **Occasional tendency to encourage or force mergers or collaborations among organizations in the community for the greater good of the systems as a whole.**

For example, one archdiocese recently merged a number of independent Catholic organizations into a single Catholic social services entity. Likewise, Baltimore's Jewish Federation recently created a single social service agency from several formally independent organizations. The Washington DC federation created a coalition of all agencies involved in senior services that member agencies were required to use as a forum for collaboration and a venue to address differences among themselves.

❖ **Ability to share resources across the system through either Federation allocations or Catholic Order or Archdiocese sponsored agreements to share resources.**

We recognize that some of the ministries of [Health System] are in markets that are

responding very much to community needs and they are never going to achieve margins. And there are other institutions like [other Sister of X Hospital in another state] that have great ability to achieve operating margins and so there is shared distribution of resources across the system.

❖ **Strong network of religiously based national umbrella organizations in addition to the local centralized systems that provided additional support and networks for organizations for that religion.** For example, Jewish umbrellas included the UJC, the umbrella organization for the Federations, and numerous special purpose umbrella organizations for different types of organizations like the social service entities and Jewish Community Centers. Archdiocese organizations included Catholic Healthcare Association and Catholic Charities USA.

❖ **Tendency for organizations outside of the centralized umbrella, either due to disagreements with the Archdiocese or Federation or for other reasons to still develop ties with other organizations either through interfaith entities or independent groups of organizations. Schools are connected with the wider faith community and centralized umbrella (order, federation or archdiocese), but are usually under the direct sponsorship of congregations.**

For example, the Jewish schools in different communities connected with other Jewish organizations in order to share opportunities like youth performances for a senior services organization. In Baltimore, the Federation provided scholarship funds to all the schools. A Catholic organization in Ohio founded by a lay person independently of the archdiocese with no relationship to the archdiocese formed a coalition with eight other Catholic organizations while also working with people from other faiths.

One Order-sponsored organization reported: *There isn't [a relationship between [order sponsored agency] and the Catholic Church Diocese... They know we are here sort of. We are listed in the Catholic Directory. We are under the Archdiocese of Baltimore 501c3 [but are not funded by them] That is a myth we have to dispel with some of our donors. I frequently get the question, "How much money does the archdiocese give you?"*

Differences Between and Within Religions

Catholic and Jewish centralized systems did differ in their structure. Catholic systems were integrated into either the archdiocese or order while Jewish systems centralized all social and health services, with the synagogues remaining independent from the service system.

The Catholic system included two forms: organizations responsible to the archdiocese and those originally responsible to a religious order. The archdiocese organizations in this sample included Catholic Charities style organizations which were directly under the control of the archdiocese and parish schools that were formally controlled by the parish, but with some centralized functions and ultimate decision making regarding a school's existence coming from the archdiocese. As such, these institutions were seen as closely tied to the church. As a leader from an Archdiocese sponsored social service organization comment: *It's kind of said we're the Catholic Church. We are the social service arm of the local church. And of the archdiocese.*

Order sponsored hospitals, schools and social service institutions maintained ties with their order through organizations systems or more direct affiliations. As discussed above, these institutions had limited ties to the local archdiocese.

In most cases, the authority of the order or archdiocese was defined and limited, and filtered through several layers of authority. For example, an archdiocesan sponsored social service organization has a two tier governance structure, with an upper level (the "Corporate Members") consisting of church hierarchy, and an operations level board that includes many Catholics and is elected by the Corporate Members as one several reserved powers. For order sponsored hospitals, most hospitals belonged to national systems, with the order appointing an oversight entity that focused among other things on the religious mission, each system also having an operations board under this entity, and each hospital having its independent board. For schools and smaller social service organizations, the nature of the relationship to the founding order varied.

Regardless of these different forms, the communal and institutionalized nature of this system provided guidance on the religious base for the organization, some centralized support for fundraising, volunteers, board training, in-kind supports like facilities or land ownership, and sometimes back office supports. For archdiocese sponsored organizations other than parish schools, outreach to parishes was also centralized with support from the archdiocese. There was also encouragement for collaboration among organizations in the same system.

The two Federations in this study both had centralized fundraising, volunteer support, and collaborative activities as central to their system. Both also had incorporated guidance and fundraising for both synagogue and community sponsored schools under the Federation umbrella. Both had formal outreach activities to the faith communities, but synagogues and Temples remained independent. For example, one Jewish Federation sponsored community center and social service organization leader commented: *We try to be very careful so we are not competing with the synagogues. Therefore we don't do any kind of ritual practice here. We don't do bar mitzvahs, we don't do weddings, we don't do funerals.*

As discussed in more detail in the Jewish section in the companion volume of this report, the two Federations differed in the nature of their relationship to their organizations, and their focus on the use of their funding due to their history and the varying nature of their communities. While both umbrella entities focused on serving Jews and supporting Jewish organizations, Baltimore both maintained a much more centralized support system for its organizations and appeared more comfortable with its organizations serving both Jews and the wider community. These differences are exemplified in these two examples:

> Baltimore: *The Federation campaign chair commented that the agency was part of a family of organizations and did not work in a vacuum. This was the segue for the chair of the Associated campaign to launch into his presentation. He said that the Associated had given him 4 pages of talking points which he didn't intend to use, instead making this more personal saying that he was leading this campaign to set an example for his child.   The agency board members had always been most generous with their contributions, but needed to be more generous with their time as volunteers for the campaign. He then went through the various volunteer activities that board members could do and said that he'd really like everyone to volunteer to do the phone-a-thon at the same time this upcoming Saturday. He got some push back on that, but persisted. He also commented that board members had been leaders in the community and the*

Associated as well as the organization. The president's report followed.   He started with another segue, announcing that the Associated had changed their allocation process and that the agencies would be more involved this year.

Washington DC: *I say is that over the years the Jewish Federation has been the agency's largest and most faithful donor. The letter I just did said that in tough times like these it becomes more important than ever that we help Federation and that they help us. That is the largest source of funding for one program and I hope people will give. It is true however that the Federation funding is exclusively or almost exclusively for Jewish persons.*

Hybrid Forms

In both the Jewish and Catholic systems, organizations existed outside the formal institutionalized systems that shared some similarities to Congregational or Network Based systems. In all cases, these organizations had either formed independently of the local institutionalized system or had broken from it early in their development. These institutions were aware of their local religious institutionalized system and sometimes received supports from them. For example, two independent Catholic organizations regularly received funds from several orders. A Jewish organization occasionally received outreach communications from their Federation, but was supported primarily by synagogues and members of the Jewish community interested in their work.

Hybrid Catholic and Jewish systems tended to be involved in interfaith work, primarily with various Mainline Protestant congregations. This interaction with congregational systems or evangelicals from other faiths probably contributed to their hybrid forms. As such, they were more likely to reach out directly to individual congregations than other non-profits in an institutionalized system.

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Congregational

In a congregational system (Schneider, Day and Anderson 2006), individual worship communities are the major resource for non-profits and often organizations were founded by one or more congregations. Even national organizations that now are under the auspices of national denominational structures regularly turn to congregations for primary forms of support. Community-wide organizations that come out of congregational systems are usually sponsored by an interfaith coalition or a coalition of congregations from the same denomination and member congregations in the founding coalition are their first line of support and guidance. If the organization is founded by a coalition, the coalition may expand or contract independent of the non-profits it supports. In addition, we frequently saw thriving congregationally based faith based organizations consciously expand their coalition base themselves. For example, GEDCO continually added both faith based and secular organizations as members and a Habitat for Humanity formed an independent outreach to synagogues and mosques to expand its support base.

The theology behind congregational systems comes out of the Protestant reformation and the religious movements that created the Peace Churches. The organizational impetus comes from ministries of individuals within a congregation or from the congregation as a whole. These organizations either formalize as separate 501c3 non-profits or become projects of the church with independent advisory committees and sometimes separate bank accounts.   Well-established organizations maintain strong ties to congregations or at least retain vestiges of these congregational roots through board appointments and other mechanisms. Primary features include:

❖ **Ministries often formalize as either independent programs of their founding congregation(s) with independent advisory committees and separate accounting systems, spin off into independent 501c3 organizations with limited ties to congregations or form as interfaith entities.** Hall (2005) notes that spinning off organizations, often as secular entities in an effort to mainstream Protestant values came from a direct strategy of 19th century Mainline Protestant leaders.   As one faith community leader commented:

> *We come together for spiritual nourishment to help us do our work in the world and we are not social service organizations. So we can start something and hope that it spins off to maturity and independence. That's great.*

❖ **Organizations maintain ties to one or more congregations through board appointments, appeals for resources, volunteers and in-kind supports.**

For example, even large national or regional organizations had their boards appointed by congregations from their denomination and regularly turned to those congregations for resources. A national refugee-serving organization operates through local affiliates who, in turn, reach out to congregations for most of the on-the-ground work of refugee sponsorship.

The boards for many of the congregational organizations were appointed by one or more congregations or Meetings. Over half of this study's congregational system organizations were formed by coalitions or interfaiths and their bylaws require that the

participating congregations appoint board members.

Likewise, these organizations reached out to their founding congregations or other nearby congregations for volunteers, in-kind supports and funding through appeals to congregations or through their founding congregation. Many of these organizations began in church buildings and some continue to reside in denominational or congregational property. For example, one researcher reported: *The church does not have a separate 501c3, but is under the conference's 501c3. The conference owns the buildings and property [for both the social service ministries and the worship space].*

❖ **Most of our congregational organizations saw volunteering as an important component of organizational activity, and created volunteer opportunities for people from their denomination and others.** This emphasis on volunteers reflected both an organizational strategy to obtain resources and a religious belief that work in the world through volunteering was an important way for church members to practice their faith. For example:

> *Interviewer: Do you get volunteers from your community, from your congregation to volunteer like at Head Start?*
> *Pastor: Yeah, yeah, everything is run like that. They see it as ministry, so what happens is that with our Head Start program, 20% of the dollars have to be in-kind or cash. So each year we provide 20% match to their federal dollars. This is how we provide it [through volunteers and other in-kind resources]. We do not charge them rent for a facility the Church built.*

❖ **Established congregational organizations usually maintained ties to their founding faith by requiring that a percentage of board members be from the founding faith or**

founding congregations.

In organizations with strong ties to their founding faiths, this pattern worked well, and these faith-affiliated board members strongly maintained the faith base. In organizations with weak ties to the founding faith community, these requirements can become problematic. For example, one Quaker institution board member reported: *There was a desperate request from [the agency] that members of our Meeting serve on the board. Their bylaws require that 50% of their board be composed of Quakers nominated by our Meeting. Our nominating committee over the years found it increasingly difficult to find anyone willing to serve... because lacking nominations from [the Meeting] they couldn't add other people to the board either.*

❖ **Congregational system organizations from Mainline Protestant and Quaker organizations often embedded their faith in more general values, with many specifically stating that they valued diversity within a general spiritual or Christian context, and on principle they did not proselytize.** Part of serving those in need involved respecting diversity. As such, de-emphasizing the founding faith during direct service was part of their religious values.

While all of the white dominated Mainline Protestant organizations in this study generally avoided program aspects that involved sharing faith, this was more mixed for some of the African American congregations and their ministries. We saw some cases resembling Unruh and Sider's (2005) holistic complementary or holistic instrumental strategies that link evangelism to social ministry. However, in most cases, the opportunities to share faith were offered as options or invitations outside of the formal program.

❖ **In some cases, the relationship between congregational organizations and their founding faith communities involved the organization serving in such a way that community members were drawn to the congregation.** In most cases, this did not involve open invitations for volunteers or program participants to join the church, but people joined the congregation because they were interested in the activities or approach of the congregation or denomination visible through the work of the organization. As such, people were attracted to the founding congregations through the embedded faith people perceived in the organizations' program. For example, Quakers often note that many members came to Friends after either volunteering with AFSC or attending a Quaker school. In one African American example:

> [*The pastor] guesstimated that about 70 percent of the current congregation have joined either because they worked at or wanted to be part of the outreach programs, or they were actually served by the outreach program before becoming a member.*

> In some cases, even in well-established non-profit organizations where the leaders were not members of the founding faith, institutions with strong ties to their founding congregations encouraged key non-profit staff to become involved with the congregation. For example, one person reported: *In the years that I was Head of [this] Quaker School, I served in the Meeting in a number of capacities that ranged the gamut from, at one time I was on the Property Committee. I helped paint the rooms in the dining room as a matter of fact. I was a Trustee of Rock Creek Quaker School, of the Meeting on the Finance Group. ... and at one time, I was Superintendent of the First Day School.*

❖ **Fewer umbrella groups and less prevalence of membership in these organizations.** While both national and local professional organizations existed for congregational system organizations, they had much less of a role for agencies and fewer agencies belong to them than in institutionalized systems. Local Interfaith organizations, which sometimes ran social services or supported independent faith-based organizations, serve as one form of umbrella organization. However, at the national or regional level, professional organization structures were fewer in number, providing primarily some support for faith background, advocacy, and some best practices materials.

This was less true of the national level social service agencies such as the Lutheran and Episcopal family and refugee services, where national affiliates sometimes had national grants that were passed through to local entities and relied on congregational support to run programs. In addition, Friends Services for the Aging provided some back office supports through insurance plans and accreditation/evaluation services for its member agencies.

Differences among Religions

The wide diversity among Mainline Protestant denominations created an equally diverse set of strategies among congregational system agencies. Those affiliated exclusively with denominations with centralized structures such as Lutherans and United Methodist tended to seek some centralized support from their local higher level adjudicatories, but often this support was limited and the conferences or synods expected organizations to primarily rely on congregations for assistance. That said, the vast majority of Mainline Protestant organizations

drew support from congregations from many denominations, and sometimes reached out to Catholic parishes and synagogues as well.

We saw more of a communal spirit in African American organizations due to the strong sense of community among African Americans due to community history (Lincoln and Mamiya 1990). This involved outreach to the general community and some collaboration among churches or with secular African American entities.   However, like McRoberts (2003) and Day (2002), we just as often saw competition among entrepreneurial African American pastors building social services affiliated exclusively with their congregations.

Quakers were also more likely to maintain some formal sponsorship through Meetings or higher level adjudicatories like a Quarterly or Yearly Meeting maintaining an organization "under its care." The sponsorship relationship largely involved appointing board members and receiving annual reports from the organization. However, these relationships could also include significant informal interactions between faith community members and the organization that maintained strong ties. This Quaker pattern of oversight came out of the communal oversight systems created early in Quaker history to maintain that individual leadings remained "in the light" or in keeping with the faith traditions and based on a spirit led calling.

Hybrid Forms

We saw very few true hybrid forms in this study. The primary one was a Lutheran organization with evangelical roots which shared similarities primarily with congregational and network systems. The national Lutheran organization also had some limited hybrid characteristics with institutionalized systems. As Theimann (2005) observes, Lutherans maintained stronger ties to the Catholic Church and, as such, maintains some institutionalized features in a predominantly congregational system. For example, the local Lutheran organization had its board appointed through congregations affiliated with both Missouri Synod and ELCA. The national organization drew some support from the national Lutheran conferences, but primarily worked through a network of local affiliates that, in turn, relied on congregations as primary sponsors for refugees and fundraising sources.

The local Lutheran organization also shared some similarities with network based system organizations. Founded as an evangelical entity, its mission has remained fluid throughout its existence. Currently, it operates a series of centers that become tight networks of staff, supporters, and those served. Gospel messages are an important part of the service tradition. However, despite these similarities to network systems, this organization also relies on congregations for support through fundraising appeals and board appointments. It has all the formal structures of a Congregational system organization.

Network Based: The system label *Network Based* refers to non-profits or congregational ministries that come out of the calling of one or two individuals with a religious vision to share or express their faith through a particular service ministry, who then gather people with a similar vision to support their ministry. Network based nonprofits may be connected with one or

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multiple congregations, but their decision-making and support systems reside outside the congregational system. Organizations in networks systems differ from congregational systems in two important ways 1) the ministry is supported by a network of individuals focused on a specific ministry and 2) the people who staff these organizations either as volunteers or paid staff share the faith approach of the organizations founders, using this faith as a prime motivator in their work. In contrast, congregational organizations draw staff and involved volunteers interested in the service or ministry of the program but do not necessarily share similar approaches to faith or come from the religion as the founding congregation(s). The *Network Based* organizations in this study ranged from small emergency services programs founded by one congregation member to a multi-site pregnancy center working to prevent abortions, and from a young evangelical Christian school to a nearly 200 year old multi-service organization that provided support through well-established ministry centers.

These organizations generally fell into two forms. Some were founded by a visionary pastor or member of a congregation. In these cases, the organization was run exclusively by one church, usually with primary responsibility residing with the pastor. This was particularly true in African American ministries, where the pastor often served as the major leader and at least titular head of the organization. While these organizations sometimes evolved into congregational style organizations once the founding pastor moved on, they were more likely to fold or wither once the founder left, lost interest, or the supporting network withered because they depended on the charisma of the founders and the shared faith based ideas of the network.

The second form involved independent leaders with a calling to ministry who gather together networks of like minded people from multiple congregations or no formal faith community membership to support their ministry. Currently, these organizations depend both on virtual networks linked through the internet and personal, word of mouth networks. For example, one large organization leader reported:

> *Interviewer: All the staff are Evangelical?*
> *Director Um hum. They're all different [denominations] and like nobody goes to church with me.*

Primary features of Network based relationships between the founding faith community and the organization include:

❖ **One main subset of this group is formed by evangelistic organizations, for which sharing their faith is a key element of the ministry.** For example:

> *If we would say to someone, 'God loves you' and let them go hungry or cold, well that certainly wouldn't do much good, on the other hand if we help someone with food and clothing but didn't give them this wonderful message that would certainly be an incomplete form of help, so the Christian Fellowship tries to always meld those two into, hopefully, a total package of helping and caring for others."*

> *I think primarily in the sense that here at the Center the gospel is foundation to what we do, and so our hope is that as we minister to women in crisis pregnancies, we'll have opportunities to share the gospel with them and so for me as an Evangelical, that's part of the great commission for me to go out and share this information with people.*

The imperative of sharing the gospel drives the founding leaders, motivates staff, and

serves as a basis for appealing to and unifying a sometimes far-flung base of support.

Not all network-based organizations are evangelistic; and not all organizations from evangelistic religions traditions use the network-based strategy. However, this strategy seems particularly suited to organizations with a strong drive to share their founding faith.

❖ **Organizations frequently become the faith community for staff, active volunteers and sometimes program participants.** Because ties of faith are a key to a strong network of support, worship is often a shared activity among those involved in the organization, and often these organizations become worship communities for their participants. For example, one organization hosted prayer breakfasts. Another organization in our pilot study drew inspiration from the charismatic pastor at a congregation that the leaders formally belonged to, but the leaders, many volunteers and program participants worshiped regularly in a small congregation housed in the same building as the organization. Another organization formed small centers that were places of service but also worship.

❖ **These organizations rely on a combination of staff and volunteers, but almost all people involved with the organization share the founding faith or have some other personal connection with the ministry and their involvement is motivated by that faith.** While we frequently found the people actively drawn to these organizations came from many congregations, their personal faith was congruent with that of the organization. Often, staff and active volunteers discussed faith or the role of faith in the program. Usually, even if faith elements were not obvious to program participants, staff and active volunteers could identify consistently the founding values and the way they influenced program activities.

For instance, while the Pregnancy Help Center did not initially discuss preserving life with women coming in for evaluations, the whole structure of the program, from the state of the art ultrasounds that showed fetal development and the various counseling sessions were specifically designed to lead a woman to see the vitality and value of the life she carried. All of the volunteers and staff involved with the organization clearly understood these goals.

In contrast, staff and volunteers in any of the emergency services, housing development or other organizations in the congregational or institutional systems came with a variety of motivations and interpretations of the organization's mission and connections to faith often varied widely among those carrying out the work.

❖ **Resources come through networks of like minded believers, and often organizations highlight their faith or trust in God as a source for resources for the organization.** For instance, one well-established organization has a series of foundation stories about how people gave the organization resources or their ministry expanded because a particular individual was led by God to the institution and provided a particular skill, funding or an in-kind donation.

❖ **Since these organizations are supported through personal networks, they are more likely to end when the pastor or founder moves on. In older, established organizations, ministries can change as the leader's calling or gospel vision changes.** For example, a director of the oldest Network Based system organization reported:

Mostly it was a volunteer organization. There was let's see, about two people-a full time director and an assistant... It was small. But these volunteers then that went out-and at one point we had, over the years, up to 1,000 volunteers. So, these people had been here ministering for a long time and their outreach was to go out into community, it wasn't necessarily to bring them to us. That was a change that came with the compassion centers... and then it moved on primarily into chaplaincy, so it had a history of change. It's not a stable organization in terms of "this is the way it started and this is the way it is and this is the way it's always going to be"… It's going to adjust, the organization flexes.

While some network based system organizations were more formalized than others, all shared these similar attributes. Network organizations were also least likely to belong to any formalized umbrella institution, though they were often part of loose affiliations and networks, such as a network of pregnancy centers. These informal linkages expanded their base of relationships but did not provide any of the supporting administrative mechanisms as did umbrella organizations across congregational and institutional systems.

Key Elements Contributing to System Differences

In addition to these different attributes, we found that these systems differed due to variation in practical theology and history of their sponsoring religions. The forms of social capital most prevalent in each varied. We briefly outline these differences here.

Practical Theology and Embedded Culture

As outlined above and detailed in the sections on each religion, next, these systems come out of the practical theology and culture of the founding religions. Catholics and Jews independently created institutionalized systems because they share a theology of responsibility for their communities of faithful, and by extension the world at large based on their theologies of responsibility to improve the general community as well. The theological concepts like tikkun olam and the idea of responsibility for the potential members of the church lead to expectations of service to the community. The communal and feudal structures that led to the hierarchy of the medieval church and the Kelihah structures of Eastern Europe that served as models for the Federations also promoted communal forms. Finally, both Jewish and Catholic theology link justice to charity. In Judaism, this linkage is most clear in the concepts of Tzedakah and Chesed, both simultaneously translated as justice and support for those in need. As described in the section on Catholics, the church had a responsibility to support to those in need because, *"whatsoever you did to the least of my brothers, you did to me"* (Mathew 25). The tendency to link justice and charity becomes stronger post Vatican II and liberation theology, with the various encyclicals on healthcare, responsibility to the needy, and so forth responding to these linked terms.

The Congregational systems, on the other hand, come out of the theologies and cultures of the Protestant reformation. Individual calls to faith lead to the creation of organizations, which are in turn supported by individuals through volunteering, individual donations, and board appointments. Congregations serve as institutions where individuals learn and practice their faith. As such, they are the major institutional resources that congregational system non-profits turn to for support. The individual, formal institutions of congregations connected through conferences of loosely connected equal institutions or limited hierarchical structures, mirrors the

tendency of agencies to either remain independent from each other or draw support from individual congregations through interfaith or inter-denominational institutions.

Likewise, the theology of the social gospel that calls for individuals to live their faith through practice in organizations (Kerr 1966) promotes the embedded faith and forms of individualized support typical of congregational system organizations. A tradition of charity to the needy that has long been a tradition among Protestant churches also shapes the levels and forms of support Congregational system organizations receive.

The tendency to divorce justice from charity often seen in Mainline Protestant also carries through to a great degree to individual organizations, which are less likely as service providing non-profits to engage in advocacy. Instead, special form advocacy institutions or social justice committees of congregations or interfaiths advocate for social change (for example, Wood 2002). As one interfaith leader notes in an earlier study (Schneider 2006), church members tend to choose to focus either on advocacy or direct service, but not both.

The loose organizational structure and focus on networks of people sharing similar beliefs typical of the Network Based system is rooted in the more individualistic framework typical of evangelical theology (Smith 1998). The "spirit-led" culture and dependence on faithful individuals rather than institutions for support is consistent with charismatic/Pentecostal beliefs. The importance of sharing faith is a key tenet of the religion that drives many of these organizations. Similar strategies with a focus on beliefs and charismatic, visionary leaders are typical of Hassidic and ultra-Orthodox Jewish organizations as well as the evangelical Christian organizations in this study. However, the Jewish entities are more likely to be hybrid forms

given the institutionalized history of Judaism and the high visibility of the Federations even for Orthodox communities.

Social Capital

Social Capital refers to social networks based on reciprocal, re-enforceable trust that people and organizations use to garner resources (Schneider 2006). Social capital includes both networks of individuals and institutions, with organizations able to maintain support over time from their founding faith communities and its institutions based on the trust based connections developed by the agency over time (Schneider 2009).   As demonstrated over and over in this study, organizations with strong ties in their founding faith communities succeeded in maintaining support and guidance from their communities, while those who had lost these networks struggled.

Organizations depend on their knowledge and manipulation of cultural capital, elements of the founding community's culture that have become symbols of membership in order to garner support from their constituent communities (Schneider 2006, 1999). These could include mission statements, religious phrases in agency materials, or simply the structure and cultural feel of the organization and its leadership. As discussed in earlier research (Schneider 1999), organizations needed both cultural and social capital to successfully maintain support from their founding faith community.

Social capital was an essential element to encourage civic engagement among faith community members, but organizational social capital often was as important as individual networks. Civic engagement refers to activities to support the common good, and may not necessarily involve long term, reciprocal trust between those providing donations or in-kind goods and the agency receiving support (Schneider 2007). Individuals connecting with organizations to provide service on major holidays, contributing to an annual campaign based on the generalized reputation of an organization, or volunteering only on a service day through a website initiative would constitute civic engagement. The higher the visibility and stronger the reputation of the agency among its constituent faith community and the presence of some form of institutional social capital between faith community and organization, the greater the civic engagement support it received from its founding faith.

Three forms of equally important social capital operate in the relationships between faith communities and their organizations. Bonding social capital (Putnam 2000) refers to densely linked networks of people who share similar culture and beliefs. The networks within the African American, Jewish, evangelical, Quaker and to a lesser extent local Catholic and Mainline Protestant denominational communities are examples of bonding social capital. Bridging social capital crosses boundaries of race, class, culture, or belief (Putnam and Feldstein 2003). However, bridging social capital involves trust based ties across groups developed over time, not weak ties (Schneider 2009). Linking social capital (World Bank 2001) refers to ties across power hierarchies such as the links between an archdiocese or Federation and its member organizations.

This research discovered that each of these systems used social capital differently. Institutionalized systems relied on high bonding social capital among both individuals and institutions to support non-profits in these systems. For example, very few of the Catholic or

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Jewish organizations stipulated that a certain percentage of their boards come from their founding faith communities; yet Jewish organizations were almost exclusively Jewish and Catholic organization often had predominantly Catholic boards. In addition, institutionalized system organizations had strong linking social capital within their communities. The Federations served to develop bridging social capital among the different branches of Judaism and the multiple umbrella organizations helped agencies develop linking ties nationally both as institutions and for their staff as individuals. Institutionalized system organizations were less likely to develop strong bridging social capital outside of the religion if they were closely tied to their institutional structures. However, they may develop bridging social capital with organizations providing similar services from other religions or secular institutions such as the umbrella organizations for independent schools and organizations serving refugees.

Congregational system organizations, on the other hand, depended on bridging social capital through interfaiths and outreach to congregations from a variety of denominations to maintain their organizations.   Outreach included a wide variety of initiatives to develop social capital links both through congregations and individuals associated with Mainline Protestant denominations. Organizations also regularly reached beyond Protestant denominations to Jews, Catholics, other religions and the secular community for support. While welcoming bridging ties, these organizations equally depended on bonding social capital with networks of individuals or key supporting congregations often as their primary source of support. They had weaker linking ties within their faith communities, although they regularly developed these ties with major government or foundation funders.

Network based organizations relied almost solely on bonding social capital. This was most obvious through the networks of core supporters that served as staff, key donors, board members and spiritual support for these agencies. Networks could come through congregations or lay associations like right-to-life networks as well as individuals. These organizational social capital ties became particularly important in garnering civic engagement for these organizations.

Implications for Practice

Understanding these different systems provides a framework for organizations within each system to understand its resource base as well as the culture and theology behind it. The fact that these systems come out of theology and religious culture suggests that, while institutions from different religious background can borrow strategies from other systems, those strategies will need to be adapted to more closely match the practical theology of that system. For instance, strengthening and developing umbrellas may be an important strategy for Congregational system organizations, but they will need to adapt forms to meet the expectations of their founding communities. The demise of the United Way systems is just one example of how a structure adapted from institutionalized systems has limited power over time in a secular or congregational based system. The fact that all of the various congregational based organizations, even the national ones, relied on fundraising and board appointments through congregations nearly 100 years after the development of the United Ways suggests the limited adaptability across practical theological lines.

The same is true between networked and congregational systems. While some network based organizations do not display their faith to people requesting services like the pregnancy center and the urban center, their support systems depend on people who share the same faith commitments. Faith is an explicit part of the glue that bonds the network. In network based organizations that originate in evangelistic religious traditions, the religious base is clearly

evident to users of services. On the other hand, congregational based organizations among liberal, Mainline Protestants would rapidly lose support if they openly proselytized because of the strong belief that promoting certain moral values or behaviors may be important, but organizations should be comfortable environments for people of all backgrounds.

Understanding how each system uses social capital differently also provides strategies for organizations within each system. In all systems, organizations with strong social capital thrived while those lacking social networks did poorly. But institutionalized system organizations that focused on bridging ties outside of the founding religion without equally developing ties in its bonding community was far less likely to maintain strong support within that founding community. Likewise, few Congregational system organizations could survive without strong bridging ties. Often, lost or attenuated social capital came from an organization losing the cultural markers that encouraged members of the community to support it.

These systems come out of the history, theology and practices of organizations and their faith communities. The next section explores these differences across systems from the point of view of each religion. The religion sections in the second volume of this report also provide insights on the nature of practical theology, strategies for stewardship and other aspects of religious based practices to maintain relationships and address concerns between faith communities and their organizations.

Stewardship

Stewardship refers to *the faith community's efforts to maintain its practical theology of justice and charity in the activities of the nonprofits affiliated with It.* Stewardship primarily involves the guidance and support that the faith community provides – or fails to provide – to a particular organization. As one would expect, given the wide variety of denominations and agencies in the study, the ways in which the faith communities maintain their ongoing relationships with their agencies and institutions vary widely. Evangelical organizations were the particular projects either of a congregation or a network of congregations, and they needed to demonstrate the faith base of their activities to the members and persuade them to provide additional resources. Jews and Catholics developed centralized systems, with Jewish strategies differing significantly from those of Catholics. Mainline Protestant, African American, and Quaker organizations followed a different model. Such differences come from the different theology and history of these churches. Post-reformation denominations, for example, have more individualized forms of maintaining connections, while older religions have more communal strategies.

The culture of stewardship manifests on a continuum that ranges from formalized expectations and relationships to more implicitly-embedded practices and attitudes. This may also include deliberate avoidance of practices or affiliations that are seen as running counter to the faith tradition and its practical theology.

Varieties of Stewardship: Formal Relationships

Formal relationships form the foundation on which the other aspects of the relationship rest. They include:

❖ **Board Recruitment and Composition** – What percentage of the board is from the faith community? This can range from 5% or less in the case of some religious orders (although much of the rest of the board may be Catholic laypeople), to 50% in the case of the Quakers, to as much as 100% in some evangelical agencies. Even though many organizations do not stipulate a number of board members, the majority of their board members may still be drawn from the founding faith. This is particularly true for Jews and Catholics. In many Catholic health systems and in the other agencies run by the religious orders, the boards nominate their membership internally, but the order approves the nominations. Not all Evangelical organizations had boards, but where they existed, they were often informal and recruited through networks of persons with similar beliefs, and with connections to the organization or the congregation's leadership.

❖ **Staff Recruitment and Composition** – This varied from advertising in the faith community's media (Jewish agencies and some Catholic), to ascertaining that prospective staff agreed with the philosophy of the agency even if they were not members of the faith community (other Catholic agencies, Jewish, Quaker), to not asking at all. With the possible exception of some evangelical agencies, most staffs are not *required* to be members of the faith community. Some directors had no idea how many of their staff were from the sponsoring faith, and showed a lack of concern over the issue. But in many cases, word-of-mouth recruitment through the faith community or active volunteers was sufficient to draw staff with similar values to the existing staff and/or from the faith community. This was particularly true for African American, Jewish, and Quaker organizations. Most of the organizations that

maintain strong ties to their faith have executive directors and other key leaders (e.g. fundraising or outreach staff) that come from the founding faith.

❖ **Umbrella Organizations** – With the exception of some Evangelical organizations, many faith-based organizations belong to umbrella organizations. These take several forms: professional organizations specific to that faith or group of faiths, system-level umbrella organizations, and interfaith organizations. These umbrella organizations often create materials to help organizations provide orientations and ongoing training on the faith tradition for board and staff. They also offer best practices and a network to share strategies for maintaining the embedded faith culture in the organization.

❖ **Formal Reporting Requirements** – Formal reporting mechanisms vary and are not always used. They range from the formal contracts requiring regular written reports that Jewish organizations have with their Federation, to annual oral reports to the founding congregation, to an expectation that annual reports or newsletters will be provided to the founding faith community, to specifically-mandated yearly third-party financial audits. Some organizations have few or no formal reporting requirements.

❖ **Staff Evaluation on Faith Community Values and Philosophy** – Again, there were wide variations: does this kind of evaluation happen at all? How formal is the evaluation process? Who does the evaluation – a faith community board member or the agency supervisor? Jewish agencies seemed not to evaluate staff on this dimension. Quaker informants cited their school's newsletter and the fact that the agency supervisor gave a report at the Monthly Meeting. The Catholic hospital system had developed a formal Identity Matrix that was scored numerically by department heads. Some Catholic orders have developed an extensive review and self-study process for their agencies. Other faith community evaluations were less formal but perhaps even more thorough. Despite the general absence of formal staff evaluation practices, many organizations described internal hiring practices that seemed to be heavily influenced by informal staff reputations for service and performance.

❖ **Clientele** – whether or not its clientele is from the faith community varies by the type of organization. Hospital and social service agencies often could not even identify how many clients utilizing their services were from the faith community. Sometimes they did not see a need to develop a mechanism for measuring such a thing, or thought that doing so would violate federal mandates. Some schools are made up entirely of the children of faith community members. If they are not, the faith community often engages in somewhat worried reflection about whether there should be more members' children in the school.

The size and scale of the organization is often a major factor driving the processes of staff selection, recruitment, and evaluation, rather than its "faith" affiliation. Larger organizations will have more formalized processes rather than world-of-mouth, and larger organizations are generally less likely to hire only co-religionists.

Other explicit forms of formal relationship also exist. These may include specific contracts between a religious tradition and an agency, mission statements that reflect the founding faith, mandated educational retreats, or requirements that (e.g.) a Quaker organization use consensus process instead of voting on decisions. Organizations may also be housed in property owned or donated by the faith community. Explicit fundraising could include an annual appeal to the faith community following the structures appropriate for that religion. For example,

Jewish organizations may receive a portion of their funding from the annual United Jewish Appeal/Federation campaign, Catholics through a bishop's fund, or a Mainline Protestant organization through appeals letters sent via a congregational mailing list.

For each religion, formal mechanisms differ. For example:

Evangelical: *As I said before, after our training and all, we do have of course in-services throughout the year and all. During those in-services, there are courses talking about our mission and that we are very dedicated and compassionate and passionate to that ministry. Of course, we have prayer every day before we start. We do believe that without God we just would not exist here. . . . Then of course we have churches that have either concerts for us or other types of fundraisers sometimes, or just blessings that we all take part in (or at least as many counselors as can take part in that). And we build each other up. I think that is how we live our faith with encouraging and praying and building each other up.*

Jewish: *The meeting started out with a presentation by the staff for the volunteer program . . . Nadiv was described as meaning "one who gives with an open heart," and a Jewish mitzvah from Talmudic traditions. This is a service learning program that brings in groups from synagogues, Jewish teen programs, the Associated's Jewish volunteer program and a couple of non-Jewish sources to offer services for the seniors.   The emergency kits program is being done in partnership with the Associated's young leadership program, and the staff thanked the Jewish Volunteer staff person at the Associated at some point during the meeting.*

Catholic: *As fewer sisters are available to administer and staff their educational ministries directly, they have established a "Sponsorship Review Process" to ensure that their overall mission and vision are reflected in how each of their sponsored organizations fulfills its separate organizational mission. To assist administrators and boards in preparing for this Sponsorship Review, a sister has been appointed the Sponsorship Coordinator for all of the sisters' North American provinces. She has developed a series of workshops for the administrators of the order's various schools and other institutions.*

Mainline Protestant: *Well, now, faith communities have basically four options of ways to get involved with the agency. We have a coalition of Christian congregations that's 13 years old that has been building one or two houses a year for 13 years . . . So Christian churches can come in and be a part of that coalition, raise the money for the houses, work on those houses, and be connected to those one or two houses a year. Thrivent financial for Lutherans, if we get their grant every year, they give us 65% of the house, Lutheran congregations raise 10%, we raise 25%. So Lutheran congregations have another option to come in through the Thrivent coalition. And our most recent coalition is the Interfaith Peace by Piece. That's a coalition of Christians, Jews, and Muslims . . . And then if a church, or a synagogue, or a mosque or whatever calls and doesn't want to be a part of one of those coalitions, they can just donate money. . . There are kind of all those options for faith partners.*

Quaker: *All Quaker-founded organizations that intended to maintain a relationship with the organization appointed a certain percentage or number of board members to*

> *the organization. . . Beyond this, several other formal mechanisms were generally used. Agencies that were formally "under the care" of a specific faith community usually reported back to their faith community on an annual basis. Other organizations, like the AFSC, made formal presentations at the Yearly Meeting and larger conference gatherings. Some Quaker organizations, however, had no formal reporting mechanisms. . . At some point in their history, most Friends Organizations were located on land or facilities owned or donated by the founding faith or its members. Umbrella organizations for retirement communities and schools also provided guidance, but these were voluntary associations that schools or agencies chose to join.*

African American: *Interviewee 1: Our organization is certainly sponsored by the church, so the grant itself says "church name" as parent to child, per se. That kind of relationship . . .*
Interviewer: So going back to the first question, would you say that is a legal relationship?
Interviewee 1: I would not say that it is legal.
Interviewee 2: It's legal in the sense that you have to have an organization 501(c)3 to qualify for a grant. And that's the way we qualify for it. But other than that, we have no other legal relationship.

As seen in the last quotation, some smaller Evangelical and African American groups derive their 501(c)3 status from their affiliation with a specific church body. However, many organizations that had become separate 501(c)3s also continued to maintain close formal ties through the founding pastor or church, with that pastor holding a leadership position with the organization or appointing key leaders. Organizations were also often located on church property, with that in-kind donation listed as a match in grant and contract applications.

Organizational Leadership

Unless the organization is founder-driven, organization leadership is usually chosen by the board. The importance that the board places on the leaders belonging to the founding faith, expressing a specific branch of that faith, or sharing the core values of the faith sets the tone for the retention of religious values within the organization. As a result, the leadership was often chosen based on their ability to represent the embedded culture, if not the explicit beliefs, of the organization. One Jewish organization leader recalled long discussions with the board about his approach to Judaism as part of his job interview. He commented that he felt it important that the executive director and development director be Jewish, but that it was less important for other staff.

With the exception of Evangelical and African American organizations, many of the staff below the executive director in most mid-sized to large agencies were not from the founding faith. However, they were

often selected because they reflected the culture of the organization.   Organizations varied significantly in their explicit use of faith based materials in orientations or staff practice.

> *Interviewer: Did you ever receive any formal statement of faith regarding the beliefs reflected in the organization's mission and service?*
>
> *Executive Director: Yes in the sense that the organizations that we're affiliated with, we have a statement of faith and that's actually from the National Council of Evangelicals.*
>
> *Interviewer: What does the statement say?*
>
> *Executive Director: It's got like 10 or 15 points to it, I don't know.*
>
> *Interviewer: What is the gist of it?*
>
> *Executive Director: Just that we believe in the Trinity, that we, you know, believe in Jesus Christ as savior for salvation and your basic Christian tenets.*
>
> *Interviewer: Does your religious faith align with this organization in all areas, if not, where are the differences?*
>
> *Executive Director: It does, it aligns with all of it.*

In the case of organizations and agencies with larger operations, a leader's commitment to explicit and embedded values must often be carefully balanced with his or her professional capacities.

> *I came to the position with I guess the qualifications "that I was a Sister of X", but that doesn't always make a good mission integration individual. Now the position is becoming much more administrative corporately so it is important for someone to have a background in (even though they don't do the business things) to be credible with the leadership team, there needs to be a certain amount of organizational understanding. The thing that has been a help for me is I have been on boards for at least 10 or 15 years.*

Umbrella Organizations

Inter-organizational collaboration is often facilitated by mutual membership in umbrella organizations. Such affiliations are an essential part of maintaining relations, and may shape religiosity in the organization. This includes compliance with denominational doctrine, in order to maintain communications and support from other bodies belonging to that same umbrella organization, as in the case of the Charitable Christian Fellowship, intra-diocesan Catholic projects, and the pregnancy help center. In the case of many Jewish organizations, there were nesting concentric organizations that fell under the broader authority of other Jewish organizations, for example Federations and their member agencies. Professional networks and community associations were also an important part of maintaining relationships with other actors in specific sectors, and many of the groups that we studied also acted as umbrella networks for multiple-member groups. Both Federations participating in this study offered Jewish educational initiatives and young leadership programs that served Jewish organizations through Jewish educational programming and Jewish board member development. Nationally, there is a rich array of umbrella organizations which offer ideas and serve as a way to network for staff.

Some Umbrella Organizations are supervisory, setting standards and monitoring faithfulness to the founding faith's practical theology. Others, such as Catholics United for the Poor in Cincinnati, were set up by the member agencies themselves to provide networking opportunities and help in grant writing. In addition, some of the larger, formal social service entities serve as subcontractors to national entities like the Lutheran Immigration and Refugee Service that oversaw national Federal contracts and provided some outreach supports to local affiliates. Many of the Quaker and Mainline Protestant organizations formed voluntary professional associations to provide common supports. For example, Friends Services for the Aging was formed after a series of conversations over several years among leaders of the retirement communities. Lutheran social service organizations were just founding a national organization at the start of the research period. Some of the umbrella organizations offer training information on core beliefs and other assistance to agencies who sought guidance; however agency perception of the value of this information varied.

Varieties of Stewardship: Informal Relationships and Embedded Practices

Implicit, embedded practices are as important a form of stewardship as are formal relationships. These may include styles of fundraising, or simply the fact that members of the faith community pay attention to the organization and comment on its ability to live up to cultural hallmarks of faithfulness. For organizations which are widely considered to be significant representatives of the faith community, such as AFSC, national Lutheran organizations, or Jewish federation agencies, the faith community members at large would often discuss their opinions of the organization. This was less true for smaller or less-centrally-visible organizations.

Technology has enhanced and expanded the nature and use of organizational communications. Email and regular website updates keep many of the younger and more tech-savvy members of the organizational community up-to-date, but mass mailings and printed fliers are far from obsolete. This is particularly true because the older members are often the core of the participating organizations and churches.

Informal Monitoring Practices

The informal practices that the faith community used to monitor organization activities ranged from commenting to board members or organization leadership to writing articles or opinions in faith community media. In all faiths, organizations that had sufficient visibility in their faith communities were watched by the general membership, with faith community members commenting on the quality and faith base of the services. For instance, whether AFSC was Quaker enough has been the subject of debate among the Society of Friends for many years. Schools are also closely watched in most faith communities, as the key symbol of ways that the faith was transmitted. Comments got back to agency leadership through many mechanisms, ranging from phone calls to leadership, to general comments reported by board members or

volunteers, or comments at events where the agency presented to the faith community. Faith community leaders also heard comments from their members about particular organizations, which were passed on to agency leaders or board members. That said, organizations that kept a low profile or had limited ties to their faith community were known by few faith community members and drew few comments.

 In communities with local newspapers for the faith, local or ethnic community, organizations could become the subject of media attention and letters to the editor. Organization leaders paid careful attention to the media and often encouraged positive press. They also used media to reach out to faith community members.

Organizations providing direct service to faith community members often had dense informal connections with members. This was particularly true for the schools and retirement communities that were originally designed to serve members of the faith community and where members could choose to use the organization depending on whether or not it met their individual religious criteria. Even the large hospital systems that served everyone received comments and suggestions from members. For example, the Jewish hospital leaders reported that they often heard comments on their services from Jews and had designed specific services

for the Orthodox community. The Catholic hospital at a community fundraising and outreach event always made reference to their Catholic roots and also reported comments from faith community members. This was less true of the social service and emergency services entities primarily serving people from other groups or which members perceived were designed for less educated or lower income individuals than most of the faith community members.
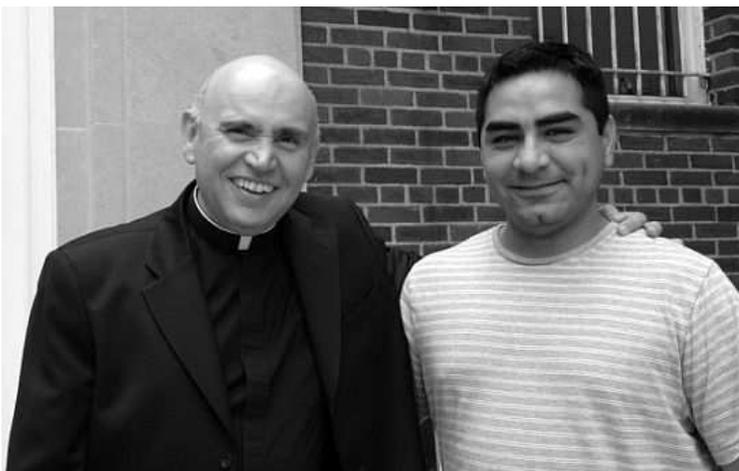
Ongoing Interaction

Forms of informal relationships included Ongoing Interaction to increase faith community involvement in the organization. These types of interaction unify the faith community and help members reflect on the deeper meaning of the organization's mission. Such interaction is also designed to increase volunteerism, in-kind support and financial support from faith community members.

> *We provide, of course, that direct service, but the other piece that we provide, we provide faith formation opportunities in the lines of direct service. The opportunities for reflection on Christian service. How we can help parishes: Let's take a group to the homeless center and let's not just paint a wall, but let's talk about what we saw there. Let's have some reflection on what we saw there. So when it comes to the faith formation, spiritual development, of people, I think our reflections on the people we are seeing and trying to help, the parish groups are also seeing what we're seeing and doing those same kinds of things, as members and more as comrades in work.*

Volunteers

Volunteers are the heart of the faith-based element within most Mainline Protestant, Evangelical and African American church organizations we have studied, but their importance varies for Jewish and Catholic organizations. However, it must also be noted that they are rarely able to articulate a particular denominational identity, even within an organization that is itself denominational at base. As one worker stated:

> I don't know that we have a denominational view of it, but I think the Gospel we sometimes refer to as the Gospel Imperative. Christians don't really have any choice but to serve their fellow human beings particularly ones who are not as fortunate. I think it fits beautifully with that. I don't know what more to say.

Volunteers and board members often view their work as an extension of their personal theology, viewing service both as an obligation and as an expression of faith. However, faith in action rather than theological exactitude tends to be the primary concern for volunteers. Volunteers' sense of their obligation to the organization is generally tied to how they perceive its activities as matching their own ideas of stewardship.

During a recent interfaith volunteer appreciation dinner the Executive Director described the findings of an internally administered volunteer survey. According to the survey, the primary way in which most of the volunteers first heard about the agency was from other volunteers. The director used this to encourage the volunteers to share their agency experiences with others. He supplemented this with a second point drawn from the same survey; the overwhelming response to the question of why people volunteered their time and effort was because the agency allowed them to "serve people in need".

The director of one of the African American organizations in the study made a similar point while addressing a group of volunteers. She referenced the organization's ten year history, and said that while there were certainly some "foundational" staff who had been present since its founding, organizational culture can take 15-20 years to develop. She told this group "You are the culture. You are the bricks and mortar being formed."

If faith community members either received services from or were active volunteers in an organization, they played a significant role in maintaining its relationship with the founding faith community. In addition, organizations like schools and even social service agencies served as a way to bring new members into the faith community itself. For instance, one Jewish school greatly increased and revitalized an aging membership, while its education programs created a more educated laity that eventually succeeded in taking a more active role in the sponsoring synagogue. Quaker schools and AFSC have regularly served as an entry point for convinced (converted) Friends. Catholic schools have sometimes served the same function in converting the families of their students to Catholicism.

Board Members

Members of the various boards of directors can also be thought of as volunteers because the time they devote to their board responsibilities is generally unpaid. This commitment of time and skill reflects the individual board members' stewardship ideals, and in general, the board is charged with preserving the Faith Community identity of the agency, particularly if a majority of the staff and/or clientele are NOT from the Faith Community.   As one Catholic sister working in

her order's hospital put it:

> *When I was Board Chair and had to interview possible board members, I would
> be sure that they knew what we were all about. I would ask them point blank,
> "Do you feel comfortable with this?" If you don't, that is OK, but you don't want to
> be on this board.*

In these instances, as is often the case, board members are the real authority behind this organization. In one agency, they were handpicked by the original founder specifically so that the vision of the organization would remain steadfast, and expected to serve for life. This organization is officially non-faith based, yet the founding members were three Catholic priests.

The ability of board members to provide guidance on the faith community's values and practices, however, varies enormously, depending on their own personal understanding of their faith. This was particularly true with Quaker boards, where the religion has no formal theology. Individual board members' interpretations of Quaker simplicity, non-violence, and what constituted "rightly ordered" business practice were extremely diverse. The culture of the board could change depending on its leadership and the background of the Quakers currently serving on it. Organizations with the strongest informal ties to Friends were more likely to draw Friends who would encourage worship based business practice and similar mechanisms in the organization as a whole.

Boards also varied widely in the practices they used to orient members on faith traditions and practices. Sometimes orientation materials came from umbrella organizations associated with that faith, but often the key to mutually agreed upon objectives and approaches was simply participation and cooperation with the organizational culture. Jewish organizations showed a particularly unique method of perpetuating their faith community identity through their boards. An ongoing practice of regularly bringing new members into various committees and subcommittees was used to acculturate participants into the organizational culture. These members were then regularly rotated to different committees. This has the effect of creating a pool of individuals who are familiar with both the broad objectives of the various Jewish organizations and the more practical aspects of organizational functioning. Ranking positions within the boards of most Jewish organizations experienced a deliberately steady turnover as various committee members with an established history of participation were regularly moved into positions of increased responsibility and authority. Similar rotations of board and committee members were also seen in several non-Jewish organizations, but not to the same degree.

Resources

Resource stewardship involves both the mechanisms by which the faith community supports its organizations and the forms that those mechanisms take. Generally, faith communities provide their organizations with similar kinds of resources: funds, in-kind supports, the use of faith community property, volunteers, and sometimes back office supports like centralized insurance, recruitment and religious training services. However, the forms that these resources took varied greatly among faiths:

❖ Jewish fundraising involved federation campaigns, but most organizations also needed to seek additional funding. Strategies usually included gala fundraising events, appeals for individual donations, particularly "naming gifts" through either donor's names being attached to buildings or portions of agencies. Individuals also were named through artwork like a tree of life with leaves named after donors or name plates on furniture. Foundation grants often

came from Jewish family foundations

❖ Most Catholic orders supplied both volunteers for their agencies and also staff who worked for a reduced salary. This was an indirect financial support for the agencies who received it. Most Catholic agencies also rely on fundraising activities and financial support from parishes, orders, or dioceses.

❖ Mainline Protestant, Evangelical, Quaker and African American organizations tended to rely heavily on volunteers recruited through faith communities, in-kind donations, and individual fundraising appeals to members of the faith community. In some instances these organizations often had free or reduced cost space in property owned by their founding faith.

Areas of Frustration and/or Lack of Clarity

While many Faith Communities have detailed quite specific expectations of their agencies, their own obligations are often less clear. Many admitted that they hadn't thought about the question. To the extent that they were able to outline them, the responsibilities of the Faith Communities toward their agencies seemed to center around being a clearing house for information (Jewish respondents), providing financial support (all faiths), attending agency functions (Catholic orders), and supplying a certain number of board members (all faiths).

> Well we are still trying to define what that sponsorship means. I hope it means that there will be some kind of financial support... Sisters make donations. The council of course is very supportive. But the financial and then what else? They are working on trying to do support development, some succession work. We are still feeling our way with sponsorship.

Internal Dissent

In some cases, faith community members expressed concern that organizations did not meet their criteria for faithfulness. Often these concerns reflected internal debates within the faith about different aspects of practical theology or moral teachings. To the extent that members either of the Faith Community or the Agency do not have the same definitions of what their mutual roles should be, the stage is set for conflict and frustration. Some Quaker informants fretted that the Meeting was not as supportive as it could be.   Several Jewish organizations were topics of discussion among Jews who either wanted organizations to practice a certain style of Orthodoxy or felt that Jewish organizations should serve only Jews. Agencies subject to large umbrella organizations in the Faith Community sometimes complained of centralized control. This problem was cited by some Jewish and Catholic informants. Finally, meddling individuals with different opinions were cited by both Quakers and Catholics:

> It is the frustration of Heads of Schools that what they hear from the Meeting at the time of Report is an individual's criticism of something at the School. It's not the corporate body; it's the individuals. Therefore, they come away and they say, oh, man, we're trying. Our heart's in the right place. We believe we're a Quaker school.

> Some very conservative Catholic organizations are spreading all this stuff about Catholic hospitals providing birth control and doing tubal ligations, and which ones are doing them and which aren't . . . there is a smattering of very conservative Catholic individuals who want to work here because we are Catholic. But they will see a sign up

advertising a yoga class and say, "That is a satanic thing." Because there are websites that say [yoga] is Satanic.

On a positive note, several Mainline Protestant and Quaker organizations reported people coming to the faith through involvement as volunteers or participants in the social service organizations. Their understandings of the faith and different backgrounds have changed the core religion. Other organizations, particularly schools, were designed either explicitly or implicitly to develop members of the faith community with particular set of values. Although not explicitly stated, in some instances, the positive nature of the work performed by the organizations is all that is needed to satisfy individuals' questions regarding adherence to religious traditions.

Defining a Specific Denominational Identity

Some of the agencies and faith communities had difficulty defining exactly what made the agencies unique to their denomination. Occasionally, organizations have become centers for discussion of what constitutes service from a particular faith or a draw into the religion. Support for the organization could depend on individual faith community members' perception of whether or not the organization is behaving in ways appropriate for that faith. Organizations have changed their practices over time as their faith community's practical theology has changed. This was evident in Baltimore Jewish organizations becoming more traditional as the Orthodox community grew. Quaker organizations shifted their policy about gender, race and sexual orientation as values within the liberal branches of Quakerism changed. Evangelical organizations have become more topic-driven and sophisticated as younger evangelicals pay more attention to the environment and other causes.
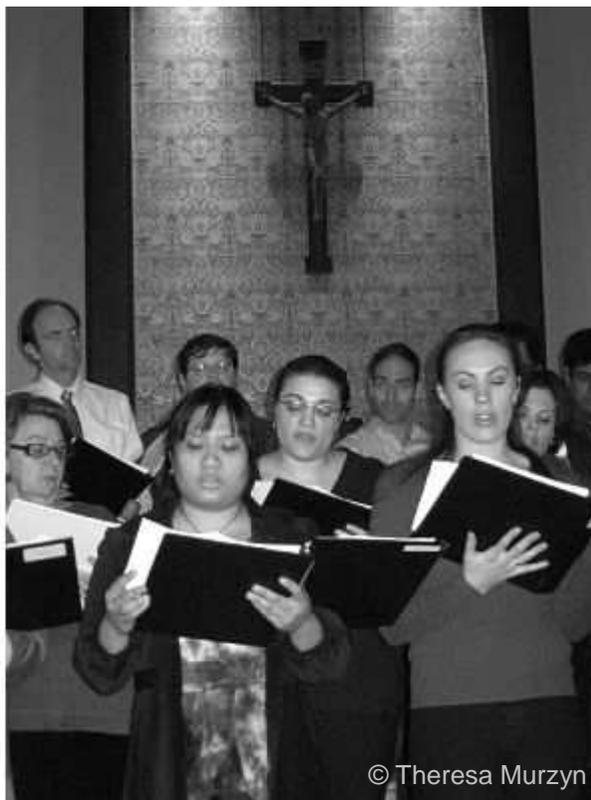
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Summary and Recommendations

The faith community's efforts to maintain its practical theology of justice and charity in the activities of the nonprofits affiliated with it depended on two key factors:

❖ A dynamic understanding between the faith based organization and its supporting faith community regarding the practical theology that informed the work of the organization

❖ The quality of the relationship between the non-profit and its supporting community.

Several key factors proved important in fostering common understandings of practical theology and positive relationships:

❖ **Leadership:** Leaders must regularly articulate the faith base of the action for it to remain alive.   Leaders include both paid staff such as an executive director and board leadership. This reminder of 'who we are' should be stated to board, staff, volunteers and some donors and public.
   o Boards and other selectors of staff should seek leadership who can articulate the stewardship focus.
   o Organizational leaders should consider implementing or adapting Jewish organizations tradition of rotating board members through all committees to encourage a full understanding of the organization.

❖ **Clarifying Faith Communities role as stewards of their organizations.** Faith communities would benefit from more reflection and action in relation to their organizations. A clear understanding of the particular stewardship approach needs to be regularly considered and articulated.
   o Tools and materials need to be developed for faith communities on such topics as what stewardship means, strategies for developing strong board members, and appropriate mechanisms for the organization to regularly share their work with the faith community
   o Both faith community and nonprofit leaders need to recognize that individual volunteers focus more on personal faith than formal theology. Helping to clarify links between personal faith and practical theology in non-profit volunteer activities is potentially a fruitful joint role for faith communities and the faith based organizations they support.

❖ **Informal relationships are as important in maintaining relationships as formal mechanisms.** Both faith communities and faith based organizations should pay attention to ways that they develop social capital through a variety of ways that faith communities can become involved with or learn about the organization and its activities. Strong informal relationships lead to more successful fundraising, organizational operations, and ability to carry forward agency mission.

Challenges & Opportunities

Every organization faces unique challenges and opportunities as they function, and each organization responds to those challenges and opportunities in its own unique fashion. Even so, there are several challenges that most of the groups participating in the study have faced in the past, or will face at some point in their future. These include issues like organizational expansion and formalization, changes in leadership, demographic shifts among member and target communities, participatory attenuation, and economic hardship. None of these challenges occur in a vacuum, and often times several of them occur in conjunction. Organizational expansion may be in response to a changing target community demographic, participatory attenuation may follow a change in leadership, and formalization may be part of a strategy to access new sources of funding. In this section we examine the questions raised by these distinct issues, and provide some positive strategies that organizations can use to address them.

1. Growth and Formalization
- ❖ What happens to organizations during times of rapid growth and/or expansion of capacity and how does this affect their relationship to their founding faith community?
- ❖ How can organizations take steps towards formalization and professionalization while preserving their faith based identity?

2. Leadership transition:
- ❖ How have organizations successfully navigated major transitions in leadership and what is the role of the faith community in leadership transition?

3. Demographic changes:
- ❖ How do faith-based organizations respond to major demographic shifts in either their faith or target community?

4. Participatory attenuation:
- ❖ What strategies have organizations used to counter attenuating faith community involvement?

5. The Current Economic Situation:
- ❖ How has the current economic situation affected the organizations participating in this study and what is the role of the faith community in supporting them during an economic downturn?

Some General Comments on Organizational Challenges

This project studied several organizational types and a wide variety of relationships between faith communities and organizations. At a most basic level, some of the social service, educational and emergency service programs that we studied were direct programs of congregations, and thus reflected the structures of that particular faith community and its leadership. This was particularly true for African American organizations and some Evangelical organizations which were direct projects of their faith are communities. Schools were also often programs of the congregation or parish for Catholics and Jews, but less often Quakers. In these cases, a committee or advisory committee of the congregation provides oversight, but the faith community leader is often directly involved in organization operations and governance.

Most of the organizations and programs studied during the course of this project owe their genesis to a specific faith community, or to collaboration between several faith communities. The size and type of organizations ranged from small food pantries and shelters to middle sized schools and large-scale social service efforts and hospitals. The age of the organizations also varied widely; some were only a few years old, while others have been in existence for decades or even longer. All of these organizations change incrementally over time, adapting to the challenges and opportunities of their sector and the spirit of the time in which they operate. Major changes are not undertaken lightly and generally require a catalyst - a striking opportunity, an economic crisis, a leadership change, or a spiritual call.

The common thread that underlies all of the concerns and challenges addressed in section is one of identity. The organizations participating in this study were chosen because of their faith-based character and even though they varied widely in the degree to which it was publicly expressed, all of them were aware if the importance of that faith to their organizations. In light of this, it is not enough for them to survive or even prevail, but for them to do so with their identity intact.

1. Growth and Formalization

❖ What happens to organizations during times of rapid growth and/or expansion of capacity and how does this affect their relationship to their founding faith community?

There are several ways that CHAI could spread itself too thin—it could expand where it does work without narrowing what it does or without sufficient additional staff or it could expand what it does without increasing the staff or it could maintain all of its current work without growing resources.

Maintaining Vital Connections between Faith Communities and their Nonprofits
Overview Report on Project Findings

http://www.faithandorganizations.umd.edu/

Expansion of services and capacity seem to be the most common issue driving organizational transformation, and its impact on the character and structure of the organizations was almost universally recognized. For the most part, organizational growth and organizational formalization and go hand-in-hand, but one does not necessarily precede the other. In some cases, it was the rapid growth of an organization that made formalization of previously informal process an imperative necessity. For example, the Jewish day school developed a formal advisory committee after it grew from two grades to six, with more than one class per grade, over just a few years.   In other instances, formalization and professionalization of an organization was a deliberate step taken in order to facilitate a new ambitious expansion of services. The Chairman of the Board of Directors for a Quaker retirement community described this strategy at a recent board meeting:

> *[We were] going through a change from a Board with an operations focus to one with Strategic Planning as its focus. We're now in the midst of implementation of the plan that was worked out then. A few years ago we looked at the plan and realized that we had to look further than ten years ahead; we needed to look 30 years. That's scary! We saw things changing in the broader social setting.*

During times of expansion, whether driven by demand or opportunity, the first step for most organizations is to turn to their faith community. For example, a large Lutheran organization took steps to increase its outreach to congregations as federal funding was cut and a large Catholic social service entity created a parish partners program to generate more support for its agency given increased need and increasingly limited grant funding. A rapidly expanding Quaker school asked its local Quarterly Meeting and then Yearly Meeting to take it under its care for spiritual guidance and additional board members, receiving approval to come "under the care" of the yearly meeting at the end of the study period.

Umbrella organizations are also a valuable resource for groups that are seeking to grow and expand capacity in a constructive and controlled fashion. The executive director of the Baltimore-based interfaith Habitat for Humanity described how they regularly use their parent organization to expand capacity.

> *Yeah. We are evaluated on how we're doing on ending poverty housing in Baltimore. And so it's how many houses are we doing a year, are we doing it efficiently, are we doing the most that we can do with the amount of money that we have and are we raising more money to do more houses? Absolutely. And Habitat for Humanity International right now they're working with us because we're growing so fast. They've sent in a consultant to work with us to help us figure out how to build more and all that. So they definitely watch to see how the affiliates are doing and as they grow they send in consultants to help you figure out how to grow.*

Although this process is generally a constructive one, disagreements over the way in which growth takes place may result in transformations of the organizations relationship to its faith community. One particular dramatic example of this is seen in St. Ambrose, a housing services organization that was founded by a Jesuit priest but ultimately spun off from the local Catholic Charities umbrella:

I think the Catholic Charities was sort of, "These are the issues you will do; this is where you will develop." That was not necessarily the vision of either [the executive director] or other members of the staff and board. So we cut our affiliation.

Highly visible successes can also lead to organizational self-assessment and transformation by inspiring and encouraging other ambitious efforts. After the pastor of Northwood Appold applied for and received a $40,000 grant he hired a professional grant writer, which lead to a $2,000,000 grant administered over the next five years and a revision of their fiscal practices. He commented: "It's almost by chance because we had no formal structure in our church where we look for grants, that was not a part of the church culture, you know. Now, of course, we do look for grants."

Similarly, after GEDCO successfully navigated a string of increasingly daunting challenges to bring its largest and most ambitious housing projects to fruition it found itself in possession of a dramatically expanded support base and organizational capacity. Many of the newly-added organizations were brought in as part if a campaign to demonstrate the breadth of community support for the housing project that the city of Baltimore was somewhat resistant to. Although they successfully grew their numbers, the degree to which those new members were actively involved was somewhat limited. In response, GEDCO implemented an extensive self-evaluation project in order to determine how best to use their newfound capabilities and to more clearly delineate the boundaries of their community. Ultimately they emerged with a clearer sense of self-identity, and fresh organizational focus.

❖ How can organizations take steps towards formalization and professionalization while preserving their faith based identity?

[We are now] more professional and there is good and bad to that. You lose some of the spontaneity and some of the spunk and all of that. On the other hand what also came with that was organizations realized they had to be more accountable to the people who worked there. So with connecting to a larger faith umbrella organization came the pension system and a Christmas bonus and some of those kinds of acknowledgements that you had real live employees and everybody who worked here isn't a priest or a nun. They had to be concerned about this life as well as the next life because they had families and they didn't have an order or a diocese that was going to take care of them.

Change over time is inevitable for all organizations. Often times, organizations began with a small staff of committed workers who are primarily concerned with providing service, rather than administrative policy. Although not all organizations undergo steady growth throughout their lifetime, the general trend is towards formalization of structure and process. These factors can have a dramatic effect on the faith-based character of an organization. In some cases, the professionalization leads to increasing secularization, which may be considered an acceptable trade-off for increased capacity and more efficient administration.

There were struggles yeah, because the volunteers who had been here 20, 30 years, two things, first they didn't want to relinquish their role and secondly they said, why should we pay for something we've been doing? The difference though, was, that they had done a wonderful job, but the issue was they would come in one or two days a week and they had a very both limited and sporadic service to give whereas the paid staff came and we could say we want you eight hours a day, five days a week.

Periods of growth are often times when the organization re-evaluates the way it applies its faith-based mission and its connection to its faith community. Interviews conducted during this project revealed creative ways in which organizations broadened or redefined their relationship to the faith community or chose to emphasize certain aspects of the faith over others. For instance, creation of a second facility for the Baltimore JCC allowed it to create more specialized programs for the Orthodox at the center near the geographical center for the Orthodox community while eventually allowing the creation of programs more appropriate for less religious Jews at the suburban facility. Similarly, a current initiative in partnership with the Federation expanded programming into secular locations to reach unaffiliated Jews. Several Jewish organizations recently rebranded to de-emphasize their Jewish ties in their names in an effort to better reach the non-Jewish community, but clearly state that this is a way to practice tikkun olam (care for the entire world) rather than secularization.

Jewish organizations are by no means unique in its fashion. When a few members of a rapidly growing ecumenical community housing agency suggested deemphasizing the faith based nature of the organization in their mission statement to reflect an increasing number of non-faith-based member organizations, the other board members protested. Similarly, some of the Catholics interviewed in this study voiced concerns about the changing nature of their schools and other institutions as priests and nuns were replaced by professional administrators and social workers whose training was perceived as being generally secular in nature.

Concerns about secularization through professionalization were not uncommon during the study, and it cannot be denied that increased reliance on "professional" administrators and staff changes the character of a faith-based organization. Several evangelical Christian organizations, including some African-American church-based projects, deliberately restrict their income to private funding sources to avoid a potential compromise of their faith-based objectives. During an interview at the Charitable Christian Foundation the Executive Director opined "You live by the grant, you die by the grant", explaining that acceptance of federal

funding for a project like their food pantry would prevent them from including religious material with the food that they distribute. Faced with the opportunity for increased funding, at the cost of decreased opportunities for ministry and evangelism, the organization has chosen to forgo any funds that would restrict or control the way in which they conduct their outreach.

It should be pointed out, however, that reliance on public funding does not always limit faith-based expression. During the pilot study and continuing into this one, the government faith based initiative encouraged organizations to highlight their faith base that had otherwise not done so. For example, large Catholic and Lutheran social service organizations re-emphasized their connections to their founding faith and increased direct outreach to congregations in response to the faith based initiative. Some of the African American organizations came into existence or expanded their programs due to increased funding available through various government initiatives for faith based social service provision and charter schools. In these instances, federal funds may formalize organizational structures, but they also foster direct connections to faith communities. The necessity for faith community matches generated initiatives to increase volunteering and other means of faith community support.

The accountability required of organizations that receive government/grant funding can significantly change day-to-day operating practices related to staffing, administration, outreach, and even self-presentation. This is particularly evident in organizations with large operating budgets, or large financial holdings:

> *We are in an era now of increasing compliance, increasing penetration by the federal government into the affairs of the local church and so therefore as a very prominent local church, as a church that manages a lot of dollars, a lot of resources, and manages a lot of people, you know, we should be above reproach in how we function and operate. So people knew that, they understood it, they come from various, you know, government agencies, public school entities, they understand that you've got to be compliant.*

However, it is important to note that professionalization is not a one-way ticket to secularization. Using professional staff is a significant part of Jewish cultures of support because their goal is to provide the highest quality services to those using their organizations. Jews have a network of Jewish communal service university programs for social workers and administrators, and some other religions provide targeted training for their professionals as well. Similarly, many Catholic agencies place a high priority on the professional capacities of their staff, with little regard to theological or denominational specifics.

Furthermore, professionalization and faith can hardly be said to be mutually exclusive. One Evangelical organization in our pilot study doubled its size through a government grant, developed through the expertise of its faith driven leadership. Increasingly, the leadership and staff of evangelical organizations are college educated with the expertise to fundraise from various sources and manage a complex organization. But these leaders rely on their faith to develop their ministries and even new resources coming from government were often viewed as God given. Plus, many professionals maintain their faith and some organizations are increasingly encouraging them to explore that faith background to their work. Like many of the leaders that we interviewed in this study, of the pastor of one African Ameican church described her involvement with the Church-based community development corporation as an extension of her spiritual ministry.

Because I was familiar with working with non-profits through my public servant life and because I knew that the church wanted to do more, I spent six months putting together what I considered to be a business strategic plan about how to move forward and make outreach ministries into something that was more viable in terms of a business. The reason that the church wanted to do that and I wanted to help the church do that is we wanted to start serving the community in a way that we could not as a church.

Faith-based accountability is built into many procedural policies. Even in situations where the Executive Director and upper-level management of an agency or organization do not belong to the founding faith, they are still answerable to the Board of Directors, an essential element of identity retention, and it's shared objectives. Examples of this can be seen in several of the organizations participating in the study. GEDCO, for example, despite its origins in the local Christian community, currently has an Orthodox Jewish director. Similarly, the Executive Director of Friends House is a Presbyterian with almost no experience with or knowledge of Quaker theology. In many situations, the differences in a theological approach between organizations and employees are addressed through ongoing informal staff dialogue, through interaction with the faith community, and through formal orientation sessions.

When we first come on, of course, everybody has a mandatory training day and everybody, every employee, who comes on receives the same thing. As part of that they hold a missions and values section, where we talk about, 'this is the agency, we are a Catholic agency, we are informed by Catholic social teaching.' Our partnerships with our local parishes, our local churches, are some of our most important works, the most important relationships, as we begin the work that we do.

2. Leadership transitions:

❖ How have organizations successfully navigated major transitions in leadership and what is the role of the faith community in leadership transition?

A new bishop also, like anybody, has priorities that are different from the last person, interests that might be different from the last person and so you reflect those interests and priorities in the work you do and how you do your work.

Transitions in leadership in either the faith community or nonprofit usually bring new directions to the organization. Leadership transitions profoundly shape connections to its founding faith community. Boards and other faith community leadership concerned about the faith base or the version of the faith that the organization practices pay particular attention to leadership changes. One Jewish agency leader recalls lengthy discussions with the search committee during the job interview about personal belief systems and what that would mean for the agency. He has taken the organization in a new direction, but with a clear connection to faith traditions. In other cases, boards carefully choose leaders that share their values, even if they do not come from the founding faith. For instance, in several cases non-Quaker organization leaders have strengthened previously strained relations to the faith community.

However, leadership changes that failed to emphasize the faith elements and ability of new leaders to create enduring networks with members of the faith community can lead to an organization losing connections to the faith community. For example, one agency where the faith community numerically dominated on the board had chosen an executive director from another faith tradition because he was "from the community served," a choice that reflected their

practical theology. Unfortunately, they rapidly found that they had made a mistake as this person's leadership style clashed with the culture of the faith community. That executive director lasted only a short time and was replaced with someone from the founding faith who was the same ethnic demographic as most people served by the agency.

Leadership transition is difficult in many African American and evangelical Christian churches, because they are "call based" and entrepreneurial based. The pastor may have spent years, or even decades, developing a ministry and they are often not willing to let that ministry go. Even the United Methodist Church, which does not use a "call system" but the Bishop decides when a pastor should leave, allows African American Pastors to spend a lifetime at a church, which makes transition difficult. One strategy that has been shown to be successful in this situation is a flattening of the traditionally hierarchical authority structure in order to build trust and cooperation between the new leader and the institution.

> *If you're a long tenured pastor, you have catechized many of the people, you have been the pastor when there's time of sorrow, you've been there at their wedding, and so a high level of trust then is transferred to the pastor. So the pastor then does not have to operate with the kind of due diligence that one would say a normal executive dealing with a board would have to do because the people then perceive that your due diligence is already done by you and God and therefore when you say to do something, all we're supposed to do is then do it. We're not supposed to question why we're doing it or how we're doing it, all we're supposed to do is to do it. Well, part of what I've come to say is that I think that accountability is very important and I go back to hey, even Christ said we need to count the cost, so that I then force on them the responsibility for being participants in the decision making process. So I don't take power to myself that I could have, I then push it back to them and I say to them, "Here is something that we need to make a decision on, what is it that you say?" I say to another group, "Here is something that we need to assess, what is your assessment?" and then what happens then is I'm changing our organizational structure from a kind of hierarchical structure and I'm flattening it into a team structure.*

Leadership changes in faith communities can equally impact the relationship to independent organizations. In several instances, organizations started by a visionary pastor lose support when that leader left. This is particularly evident in evangelical and African-American church ministries that are often entrepreneurial in nature. For instance, one Evangelical project received far less support when a new pastor took over the church and a similar reduction in support following leadership

change was also seen in two of the African American organizations in this study. In other cases, leadership changes in the faith community provide the impetus for organization formation or growth. For instance, JCA came out of a planning study developed by newer leaders of the local Federation who envisioned a more active involvement in local social services by the Washington DC area Jewish community.

Although strong leadership is certainly an asset for any organization, an organization that is overly reliant on a single individual is sure to face additional problems once that person moves on. This was explicitly noted by the former board president of a Quaker school in her description of the transition struggles following one particularly difficult leadership transition.

> *Although things were falling apart with [new executive director's] leadership the process of planning that happened actually served the community well and it began to think on its own. They weren't relying on [old executive director's] leadership and it was really growing. So the community matured in that period. Yes and to that degree - I didn't feel the board was dysfunctional in any way except that we had relied on [old executive director] and had to learn to be a board without [old executive director].*

Network organizations prove a special case because many are independent organizations that serve as formal or informal worship communities for their members. In these agencies, ability to maintain the faith centered mission often is essential to organization sustenance. For these direct faith community programs, changes in organizational leadership was often, in effect, a change in faith leadership as well, making it a doubly critical period of organizational transition.

3. Demographic changes:

- ❖ How do faith-based organizations respond to major demographic shifts in either their faith or target community?

The longer an organization is in existence, the more likely they are faced challenges related to demographic shifts into their staffing and in their target community. As a result, the older organizations' histories provide a treasure trove of anecdotal and historical responses to this challenge. Groups with several decades of experience can be seen to be taking a variety of steps on a regular basis in response to these changes. An active willingness to adapt to these new challenges is particularly evident in the most successful and robust organizations studied.

Factors like formal incorporation, expansion of services, and changes in leadership are also significant drivers of organizational transition and transformation. Jews and Catholics are rigorously attentive to the effects of generational shifts. Strategic plans and self-assessment studies are sometimes used to mitigate the results of these changes. Jewish organizations in particular rely on advance planning to determine organizational direction; Federations, synagogues, and non-profits all perform regular planning studies and generally adhere to the changes suggested by the study's conclusions. This was by no means exclusive to the Jewish organizations; many of the organizations studied had recently performed some sort of audit or self-evaluation.

Unfortunately, these organizational transformations, and the changes suggested by self-examination are no guarantee of successful transition. Failure to reach consensus on a course of action can leave an organization no better off than before the planning session. QSS, for example, has undergone serious ongoing struggles which regular planning retreats have failed to resolve, primarily because the Board was unable to make clear decisions.

Leadership changes can lead to changes in the demographics of either the population served or the faith community. One Jewish agency, which always served both Jews and non-Jews, greatly expanded their programming for non-Jews after a leadership change:

When I came to the agency, the management of the organization was overwhelmingly Jewish, now it is much more mixed. The front line workers were always a mixed group, I would say that we are much more vocal with the Jewish people about how very non-sectarian our services are and we are much more challenging of donors that their money could be and should be used to help people regardless of faith when they are in need and so, for example, when I got here we had funds, as I mentioned, that were for Jews only, there are no such funds now.

Likewise, faith communities can use non-profits as a draw to the congregation. For example, one African American pastor commented that perhaps 70 percent of the congregation had been involved in one of the service ministries the church ran.   This is particular true of schools. Many convinced (converted) Quakers learned about Friends as students in Quaker schools. Likewise, synagogues have used their schools to build their congregation:

My guess is that the reason why [the rabbi] when he proposed the day school it was received with so much enthusiasm and support is because [the synagogue] was an aging congregation. The religion school was growing smaller and smaller. People with wisdom saw this as a wonderful opportunity to bring in new young families to the congregation and they have over the years. I am sure hundreds of people are affiliated with the congregation because they were introduced to the congregation through the school.

Demographic changes in faith communities can also shift the nature of organizations. For example, the dwindling number of nuns and priests contributed to the creation of the larger hospital systems and shifts in the nature of some of the Catholic schools. The increasing number of college educated, socially liberal evangelicals has led to creation of the sophisticated independent evangelical organizations like the Urban Center and Pregnancy Help Center. The aging and dwindling population in the United Methodist churches supporting Frankford Group Ministry contributed to the organization closing. Annapolis area Christian School provides another example of demographically-driven organizational transformation; although it was initially established to serve the evangelical Christian community its enrollment and support has increasingly come from the local mainline Protestant community. This shift in attendance is now reflected in general character of the school, which is generally perceived as broadly Christian, rather than specifically evangelical.

4. Participatory attenuation:

❖ What strategies have organizations used to counter attenuating faith community involvement?

What happened was, people in the beginning, there were Quakers who were on the board either from the [the founding] Meeting or from here and over the years as they have dropped off, either because they have reached the end of their term or they died or what have you or had to leave for other reasons. We were not attentive to that, and I didn't pay any attention to it, until all of the sudden we got into legal trouble because the board was not constituting according to our by-laws [regarding the number of Quakers on the board] and the lawyers said 'you've got to fix this or the actions of the board are not legal because you are not following your own guidelines, your own bylaws.'

This example is typical for non-profits that are attached to a single congregation. In this case, the executive director sought successfully to bring her organization under the care of a higher level adjudicatory body – the regional Yearly Meeting. In another instance, one social service organization studied previously (Schneider 1999) and approached to participate in phase 2 of this study, had lost effective ties to its founding Quaker community after several choices of executive directors hired from within the existing board or staff with limited leadership ability and limited understanding of Quakers. This organization is formally under the care of Friends, with board appointees through a Quarterly Meeting, but board appointments had been weak for a number of years. The Quakers had played a limited role in choosing agency executive directors and connections to the founding faith were seldom discussed with leadership. During this study, the organization was facing potential sale of property and closing programs due to loss of a major funding source. Quaker board members debated at length whether or not to participate in the study because they were not sure that this was still a faith based organization. Ultimately they chose not to participate just as the executive director brought the organization under the umbrella of a large, respected social service entity affiliated with the African American community, the major community served by the agency.

In other cases, organizations have expanded beyond their original faith community when they found that they were not receiving sufficient support from their founding community. For example, a Habitat for Humanity chapter discovered that it had trouble getting either funding or volunteers from its core faith communities because access was controlled by key volunteers who only recruited others from their personal social networks. In order to gain more resources to survive, the organization created a separate program for Jewish and Muslim faith communities to do Habitat houses.

Finally, in some cases, changing relationships to the founding faith community can cause an organization to become independent of them completely. This occurred with Catholic organizations uncomfortable with archdiocese structures, but the archdiocese still maintained informal contact with the organization. One Evangelical Christian school broke with its founding congregation when its values shifted from the original core faith beliefs. The school became an independent conservative Christian school and the families that shared the original congregation's theology formed a new school.

5. The current Economic Situation

Nancy Jagelka ©

❖ How has the current economic situation affected the organizations participating in this study and what is the role of the faith community in supporting them during an economic downturn?

Throughout 2008 the US economy underwent a steady recession that included a major collapse of real estate values and the failure of multiple national and local banking institutions. Because many of the institutions that we studied were directly engaged in countering the effects of poverty and homelessness, the impact of the economic downturn and the agency responses to it was dramatically evident in the data we gathered.

> *If GEDCO cannot provide more housing, then they will instead take their services to the people in need. In order to do this, they will intensify their focus on the GEDCO community.*

The timing of this research project in relation to the current economic situation was quite fortuitous. During the time when we were conducting our research, many of the organizations that we were studying were responding to the economic downturn that progressively unfolded throughout 2009. This gave us the opportunity to see how our research subjects responded to a major fiscal and operational challenge. The basic strategies for handling the economic situation were straightforward: Decrease operating expenses and Increase fundraising.

For example, Baltimore's Jewish Federation kept a close eye on the impact of the spiraling economy on their organizations, producing a fast facts document that showed increased need and ways that the organizations were developing new programming to meet it. Despite poor economic conditions, contributions to federation campaign increased. Other organizations used symbols of the economic downturn to raise consciousness regarding tough economic times and

show that they were focused on the people they served. For example, one emergency services organization that traditionally held a lavish gala fundraiser substituted artfully arranged cans of food as table centerpieces instead of flowers. Several other organizations used similar strategies or publicly announced that they were scaling down the lavishness of their fundraisers to ensure they put more money into services.

Despite the increased demands that the weak economy has placed on these groups, initially few of the organizations considered service cutbacks to be a viable response to the situation. In fact, several service agencies saw the challenges as an opportunity to expand their capacity, their service offerings, and their target community. However, as the recession deepened, some considered cuts in staff or program as need increased and funding decreased. As with so many other factors in this study, the degree to which faith and finances are intertwined varies widely from organization to organization. The effectiveness of the various organizational strategies during the economic downturn seems to be largely contingent on two factors: Adaptability and Credibility.

Organizations that took immediate steps responding to the economic downturn received enthusiastic support from their pre-established funding and volunteer base, but their visible rapid action was also essential to motivating new sources of support from other sectors and organizations. One independent Catholic organization focused on housing reported:

> *We have nine people working on [the foreclosure crisis] full time. We have three lawyers, counselors, paralegals. But Catholic Charities – I got a letter from the Director two weeks ago saying, "We are thinking of you. We know you are very busy with the foreclosures. We don't have any programs working on this and we wanted to help out a little." And they sent a check for $25K. That is the guy that turned me out! Isn't that interesting?*

The established reputation of the active service organizations also played an important role in their ability to mobilize funding and volunteer resources quickly. Organizations with close ties to specific faith communities were able to utilize their past history of public faith-oriented action as a guarantee to encourage donations and other forms of assistance. Clear adherence to theologically sound practice meant that other individuals from that same denomination could give confidently, knowing that their donations would be used in a manner that was in keeping with their own faith-based convictions.

> *So the question to resources, people began to give based on the fact that they knew that this financial capacity and transparency was put in place with 21 persons on the finance board, they saw the work of the trustees that was dealing with issues of compliance and transparency, they saw the Church being very accountable, I brought in a treasurer that had high experience with managing a bureaucracy, so she began to put those kinds of reports and balance sheets together so people then had trust that the dollars were going to where they were supposed to go, that we were operating with a budget, budget categories, that checks had two people signing and all those kinds of things, there were balances in the system and I think the trust factor, people were there as well as the needs were clear and people began to give more.*

Institutions with less overt faith-based connections were also able to rapidly mobilize money and volunteers, but in their case it was enabled by their fiscal and procedural credibility. Organizations with an established record of fiscal transparency and successful outreach saw a

rapid and enthusiastic response to their own undertakings in the face of financial crisis. Even in these situations, however decisions over disbursement of funds must be handled publicly and with great care.

> *[One] of the problems you have when it is not faith-pbased but a non-profit you have the trust theory that goes into a non-profit. People give to a non-profit because they want to. Then if that non-profit is going to take that money and give it to another non-profit they say you can't do that because - wait a minute, I gave to the library. I didn't expect this money to be going to a food pantry.*

Unfortunately, not all organizations have seen an increase in funding during the economic downturn, and several have experienced significant financial pressures based on decreased giving and increased need. This was particularly true for Mainline Protestant organizations and smaller organizations without an institutionalized fundraising network to support them. One Jewish agency, after initial strong success in a capital campaign, found donors unwilling to give until the economy turned around. Two of the organizations being studied during this project were actually forced to close their doors due to severe financial problems, and several organizations participation in the project attenuated as they struggled to respond to pressing fiscal and operational demands.

Each strategy to respond to opportunities, address challenges, maintain relationships, and respond to society-wide pressures differs among each religion. However, our discussion of stewardship and this section both highlight some similar patterns among specific religions, with Catholics and Jews sharing some distinct organizational strategies while the approaches of many of the agencies founded by post-reformation religions display notable common attributes. Evangelical organizations and some African American organizations differ from the others in terms of their resource strategies, ways to maintain connections, and program focus.

Positive Strategies in Response to Challenges and Opportunities

Some helpful positive strategies have emerged from our research, observations, and interviews. As mentioned earlier, the types of challenges and opportunities that regularly face faith-based organizations are often aggregate issues of growth, formalization, leadership transition, demographic change, participatory attenuation, and economic struggle. The strategies presented in this section apply to a variety of compound institutional challenges.

❖ **Understand the role the organization plays in the lives of those actively involved, regardless of their formal role:**

Often, the faith-based quality of the work being done was a prime motivating factor for the participating volunteers, board members, administrators, and paid staff. Even if the work being performed was not of an explicitly spiritual or charitable nature, the positive effect of the organization's work was regularly cited by interviewees as powerful benefit to their participation, even when it was not a motivating factor.

❖ **Create open lines of communication between volunteers and board members**

Given that the two groups most responsible for preserving an organization's identity are its board of directors, and its volunteer community, it may be felicitous for open channels of communication to be established between the two groups. This may be accomplished by incorporating volunteers or volunteer representatives to the Board of Directors structure, and it may also be accomplished by encouraging board members to participate in volunteer activities on a more regular basis. Furthermore, direct engagement with the served community can also facilitate more effective responses to their needs of the community served. For example, one retirement community requires that two residents attend their board meetings as representatives

of the retirees, and Stadium Place board meetings are always attended by at least one employee of the housing complex. This integration between leadership and administration, staff, and target community provides a broader perspective on organizational challenges, and also facilitates a more fully integrated understanding of the organization priorities and objectives.

❖ **Incorporate multiple generations**

This applies to both the faith community and to the faith-based organizations. Designating roles for middle school and high school students, in addition to adults of all ages, strengthens the networks between the faith community and the organization by encouraging multigenerational participation while simultaneously taking a long view towards organizational sustainability and perpetuation of ideals. The Associated Jewish charities of Baltimore has been particularly successful with this strategy; by creating specific positions on the Board for younger members they have integrated subsequent generations of participants into their operational processes and organizational culture.

❖ **Define the community expectations for agency and vice versa**

The organizations participating in the study generally had a clear idea of what their own role was in relation to their faith community, but the inverse was not always clear. Often times they saw the faith community role is simply a source for volunteers and funding, without recognizing the importance of the founding faith community's role in establishing and developing the identity of the organization itself. (For a deeper exploration of this topic see stewardship section of this report.)

❖ **Clarify accountability processes**

Established accountability process may not facilitate rapid organizational adaptation, but responding to challenges can at least be rendered less contentious it clear avenues and processes for change are in place ahead of time. Furthermore, Accountability creates a network of reciprocity. When an organization has clear channels of accountability to a faith community, those same channels can be used to encourage deeper engagement in the organization on the part of the faith community.

❖ **Encourage greater integration between the organization and the faith community**

Increased integration between the organization and its faith community provides structural reinforcement; the appointment of members of the faith community to the board provides avenues for dissemination and communication between those entities. Similarly, some organizations found it useful to designate liaisons whose role is maintaining and nurturing participation of member congregations in the organization.

❖ **Encourage organizational self-assessment and self-examination**

In order to respond to challenges, an organization must be aware of them. Although many organizations regularly review their fiscal strategies on an annual basis, and most are willing to regularly evaluate the effectiveness of their various programs there are many aspects of organizational identity that are often left unquestioned. One important part of the Faith and Organizations project has been to develop a self-assessment tool that agencies and organizations can use to understand the relationship between their organization and the supporting faith community. The self-assessment tool addresses many of the challenges described above, and provides several useful avenues of inquiry into often overlooked aspects of organizational identity. It can be used in conjunction with this report or as a stand-alone module for organizations interested in anticipating and resolving a wide range of issues relating to staff culture, stewardship, practical theology, and organizational transition.

Faith and Organizations Project Self Assessment Instrument

OVERVIEW

The goal of the *Maintaining Vital Connections Between Faith Communities and their Organizations* project is to provide a comprehensive understanding of the connections between faith based organizations and their founding religious bodies and provide tools to faith communities and their organizations to enhance stewardship. The project examines stewardship across several Mainline Protestant/Evangelical denominations, the African American churches, Peace churches (primarily Quakers), Catholics, and Jews in order to outline common elements across religions and strategies specific to each denomination or religion. The project relies primarily on qualitative, multi-methods ethnography to explore questions of stewardship and practical theology. In addition, one of the products of the study will be a combination qualitative and quantitative self-assessment for faith communities and organizations that could be used in future research.

GOAL OF SELF ASSESSMENT INSTRUMENT

The self assessment instrument draws on the findings from the ethnographic research and is designed to provide faith communities and organizations with a hands-on tool that they can use to understand the relationship between their organization and the religious body, discern what stewardship means for them, and identify strategies to improve relationships. The assessment tool is internally oriented, should stimulate internal reflection and discussion, and should serve as a means to initiate and guide action (should that be deemed advisable). It will serve as a stand-alone tool accompanied with implementation guidelines and other materials that describe best practices and strategies to enhance stewardship. Instrument design has been guided by consultation with knowledgeable study participants and members of the research team. The instrument is currently being pre-tested and final modifications are being made.

TOPICS COVERED

The instrument's questions focus primarily on the assessment of the present stewardship relationship and suggestions for improvements. The major topics covered include:

- What is the practical theology of the agency and faith community?

- What is the stewardship relationship between the agency and the faith community?

- What are the positive and negative aspects of the stewardship relationship?

- What factors are responsible for the positive and negatives aspects?

- How could the stewardship relationship be improved?

QUESTIONNAIRE DESIGN

Questionnaire design involved the consideration of several factors:

❖ Given that faith communities and agencies will assess the stewardship relationship between them from their own perspectives, two questionnaires are needed to assess the stewardship relationship between a faith community—agency pair. While both questionnaires focus on the stewardship relationship, one questionnaire is designed for the faith community and another is designed for the agency.

❖ Conversations with knowledgeable representatives of faith communities and agencies highlighted the fact that different faith communities conceptualized, articulated, and practiced stewardship in different ways. Therefore, the particulars of specific denominational traditions needed to be considered in the inclusion or the wording of specific questions. Extensive conversations were held with and input obtained from members of the religious traditions in the project. Three sets of questionnaires were subsequently produced and pre-tested, including one each for Protestant/Catholics, Jews, and Evangelicals.

❖ Network organizations, in this study including only Evangelical organizations, differed significantly from the other faith communities. Stewardship takes the form of participation in free standing organizations founded by evangelicals or developing specific projects through an individual congregation. These factors needed to be taken into account in the design of the network organization questionnaire. As a result, only one questionnaire was created for this organizational form.

Questionnaire Sections and Questions

Each questionnaire was conceptually divided into several specific sections. These are summarized below.

I. Practical Theology
How do the agency and the faith community understand its practical theology regarding work in the world? How is the practical theology articulated? How is the practical theology carried out in programs and services?

II. Stewardship Relationship
Is the agency substantially under the care of a faith community, strongly affiliated with a faith community, or weakly (or unaffiliated) with a particular faith community?

III. Stewardship Evaluation
What are the perceptions of the positive and negative aspects of the various dimensions of the stewardship relationship?

IV. Stewardship Diagnosis
What factors have produced the positive and negative aspects? While conceptually distinct, sections III, IV, and V are largely integrated in the questionnaire.

V. Strategies for Improvement
What strategies might be productive in furthering the stewardship relationship?

QUESTIONNAIRE PRETESTS

A number of pretests have been carried out during the design of the questionnaires and the progress of the project through Phase I and II. From feedback acquired through these pretests, the questionnaires have been modified as appropriate. Additional pretests will be conducted and analyzed through the remainder of Phase II of the project. It is anticipated that a final version of the questionnaire will be produced upon completion of the interviews.

The number of organizations from Phase I and Phase II involved in pretests is noted below:

- Quakers: 10
- Catholics: 9
- Jews: 11
- African American Churches: 10
- Mainline Protestants: 9
- Evangelicals: 4

A number of Evangelical and a few Mainline Protestant sites in Phase I of the project did not participate in the self assessment process, mainly as they felt that it was redundant or the economic conditions took their focus away from the project. This was especially true for the Evangelical sites, but there was also a Mainline Protestant site that closed down due in large part to the economic downturn. Other sites were just too busy with the outpouring of people with heightened needs or who were newly experiencing hardship on many levels due to their reduced economic situations. This may have been the case with one African American site that dealt with housing foreclosures issues and another that dealt with other pressing needs.

There are several sites still to participate in the site assessment process, largely in the Southern region of the country for Phase II of the project. Included in this group are a number of Mainline Protestant and Evangelical sites. Already, two Mainline Protestant sites from the South have been completed and all of the African American Churches and agencies in the Midwest are being finalized. Additionally, an Islamic site has been added for Phase II.

Conclusion

This report provides an outline of our findings from in-depth study of organizations across religious traditions and offering different kinds of services. We found a wide range in styles of maintaining connections within and among religious traditions, but strategies clearly tracked back to the history and theology of the founding faith. Taken together, four factors shaped the nature of the relationship between the founding faith community and the organization:

1. Practical theology of that religion:

The goals for service provision and the strategies for organizing faith based activities in each religion came out of the practical theology of a given religious tradition. As a result, Evangelical responses came out of the beliefs of the network of people involved in a particular ministry while liberal Mainline Protestant strategies involved practicing faith through acts of service based on earlier concepts of charity and social gospel ministries. African American strategies drew from both theological traditions, but with a strong overlay of moral and social uplift for their community. Quaker organizations reflected the testimonies of seeking that of God in everyone, integrity, equality, and seeking God's will in decision processes. Jewish strategies reflected a theology of obligation to support and improve the community and larger world. Catholics also saw social service as a communal obligation of the church. We observed several lessons for practice from this connection between practical theology and strategies to maintain connections to organizations:

❖ **Faith communities that used stewardship strategies to convey their practical theology to their organizations successfully over time were more likely to maintain strong relationships with those non-profits.** Depending on the religion, strategies varied widely from carefully choosing board members and key staff that understood underlying religious values, to providing orientation or ongoing education for board members and key staff about practical theology, to informal communications and ongoing networks between the faith community and the organization that kept the faith tradition ever present.

❖ **Organizations that reflected the embedded culture of their founding faith had broader and stronger support from their supporting faith communities.** These embedded practices usually involved the cultural style of the organization, creating an atmosphere that people from the faith felt comfortable with or reflecting values in organizational programming and materials that reflected the dominant values in the faith community at the present time. For instance, Jewish organization leaders spoke of creating "Jewish Oxygen." Catholics, African Americans and Mainline Protestants similarly cited cultural attributes in praise of the organizations they supported. Quakers felt uncomfortable with Quaker based organizations where decision making was hierarchical or not transparent, but were more likely to support non-profits that embedded Quaker worship practices and decision making in the organizational culture.

❖ **Relationship tensions often reflected concerns that the organization no longer reflected this founding practical theology from parts of the faith community.** However these concerns could reflect two very different situations:

o **Faith community consensus on concerns:** If concerns regarding organization practices were held by a large number of people associated with the faith community, organizations and faith communities struggled regarding how to rectify problems or whether the organization should become independent of the faith community. In several historical cases with positive outcomes, leadership changes among non-profit key staff and board members were made in order to change organization direction. In less successful situations, faith communities and non-profits clearly stated that there were problems but often spent years puzzling over the causes of the rift and how to resolve it.

o **Faith based nonprofits as a target for ongoing debates in the faith community.** Just as often, faith community members' concerns regarding the practical theology in an organization reflected ongoing debates within the faith community about doctrine or religious values.   In these cases, the organization received support from some parts of the faith community, but not others. In Jewish organizations, defining tikun olom as either healing the entire world or serving just the Jewish community was one major topic of debate. Traditional Orthodox practices (levels of Kashrut, Sabbath closings) also were debated. Various Catholic teachings were debated in discussions regarding schools and hospitals. As our earlier examples show, these debates could take years to resolve. New topics of debate could also develop as the practical theology of a faith tradition evolves.

2. **History of that Faith Community in the United States:** Catholics, Jews, and African Americans started out as minority communities that developed independent service and education structures to support people from their own groups. These initial strong ties have evolved into systems with strong internal social capital for all of these groups and, for Jews and Catholics, an ability to build quasi-integrated systems to support agencies affiliated with that religion.   But as each has become more integrated into the larger society, they have developed a unique strategy to engage with the wider community. Catholics have transformed the concept of subsidiarity (Hehir 2000), initially defined as "taking care of one's own before sending them to government aid," into using government funds to provide services consonant with Catholic teachings and culture. Likewise, while African American churches primarily provide for people from their racial community, they increasingly use government funds to do so and some churches have developed a wider role in the arena of policy advocacy. Jews also initially served their own community, but increasingly relied on broader definitions of tikun olom as their social welfare and development institutions gradually refocused on serving the broader community.

As the dominant religious culture Mainline Protestants, on the other hand, intentionally mainstreamed their beliefs and organizational strategies to a point that their stewardship strategies of board appointments, fundraising strategies, and organizational structures are largely identical to secular non-profits (Hall 2005, Demerath et al 1998). Nevertheless, we found Mainline Protestants maintaining relationships to non-profits they founded through these similar strategies and increasingly interfaith initiatives.

While evangelical education and service strategies have a long history in the U.S. through such institutions as Salvation Army, the gospel missions, and schools, evangelicals are sometimes understood as focused primarily on individual or pastor led initiatives to save souls. Recently evangelical social welfare strategies have re-emerged in the sophisticated

ministries like the Pregnancy Help Center and urban ministry project, with these new forms existing beside the old.

Quakers have always played a significant role in developing innovative strategies to address social problems, and we saw this continuing in some of their organizations today. Others rely on the theology of the founding faith to structure organization policy and stewardship, but as with some of the schools and retirement communities services target similar populations as other organizations and largely look similar to facilities run by other religions or secular institutions.

3. **The quality and nature of social capital between faith community and organization.** Universally, we found that organizations and faith communities that developed trusting ties between agency and founding community had much more positive and strong relationships than those that did not. As discussed in the systems section, each religion and system relied on different mixes of bridging, bonding, and linking social capital to achieve this goal.

We also found that umbrella institutions of many forms strengthened the relationship of organizations to their founding faith and each other, as well as providing resources to support those organizations. Agencies coming out of religions with fewer traditions of collaboration and less use of umbrella organizations had less support as the recession deepened over the study period.

This finding suggests several strategies to strengthen connections between faith communities and organizations:

❖ **Both organizations and faith communities need to pay attention to building social capital alongside developing their stewardship mechanisms and clarifying their practical theology for organizations.**

❖ **Developing and strengthening umbrella organizations is another important aspect of both maintaining connections and building healthy organizations.**

4. **The nature of the service provided.** We found much in common in the organizational forms and service provision of the various schools, social service agencies, retirement communities, health care institutions, community development entities, and emergency services organizations that participated in this study. These similarities come from standards set by government, community wide funding institutions like United Way, private funders, and simply sharing strategies or copying strategies from organizations providing similar services. As such, stewardship strategies necessarily differ depending on organization type. However, we simultaneously found similarities and differences among organizations providing the same service, with those differences often reflecting the founding faith traditions. These dual strategies are best understood not as contradictory forces in opposition, but as two equally important strands of maintaining healthy organizations that provide quality services from a clear mission.

The primary goal of this study was to explore the nature of faith based stewardship in the 21st century in the United States. We found that stewardship meant much more than providing resources to organizations, in fact funding from the faith community has become a small proportion of the budgets of most of these agencies, ranging from 5 to 20 percent of most faith based organizations in this study. However, this small percentage of funding had great

symbolic weight for the organization for two reasons. First, many government and private foundation funders expected a match from the faith community, either in kind (buildings, volunteer labor, other in-kind donations) or in cash, often as an indicator that the organization had backing from its founding community. Financial and in-kind support from the faith communities provided this match, and with it legitimacy that government and other funders that matching funds represent.

Second, while a small proportion of budgets, faith community donations could add up to anywhere from several thousand to several hundred thousand in operations spending that was not tied to government or secular private funder criteria for its use. This faith community funding was essential to allow organizations to meet their religiously based mission, which usually mandated serving people outside of those targeted by government programs. For example, many of the agencies that received government funds were required only to serve people below a certain income threshold established by government. Faith community and other private donations allowed these programs to serve other populations, often groups affiliated with the agency's faith based mission. For example, JCA's Federation allocations paid for transportation for Jewish elderly regardless of income. Several other organizations noted that faith community funds and in-kind supports allowed them to meet their missions of serving a greater portion of people in need in their community, most coming from other religious backgrounds than the organization. For example, a Quaker organization in an earlier study (Schneider 1999) provided funds to cover energy costs to both people below the federal poverty level through government funds and others earning above that threshold through a special fund provided by their faith community.

The various strategies to maintain the practical theology of the founding faith in the organization and build enduring ties between faith community and organization proved essential in continued support from the faith community on an ongoing basis**.** As discussed in the section on economic downturn, organizations that exhibited appropriate practical theology received enthusiastic support while those that did not received fewer resources, weak board members, and moved into a downward spiral that eventually led to closure or a break with the faith community. Ability to garner resources from the faith community, in the form of funding, in-kind donations, and volunteers often depended on the ability of organizations to reflect appropriate practical theology or embedded culture. Faith community efforts to maintain social capital connections and ensure the organization followed their practical theology in the form most appropriate for that religion were key to maintaining the religious ethos in their organizations.

This report is designed to promote discussion of these issues as we move forward in developing both more in depth publications in these topics and practical tools for faith communities and their organizations. This study is also designed as one in a series of studies addressing the broader questions outlined at the beginning of this report. Additional materials are available on the project website at http://www.faithandorganizations.umd.edu/. Please address any communications to faithandorganizations@anth.umd.edu.

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Appendix A: History of the Faith and Organizations Project.

Always conceived as an interdenominational effort, the Faith and Organizations project started as an initiative of Friends Board Training and Support Project, a program associated with the Religious Society of Friends (Quakers). The project team and advisory committee quickly expanded to include scholars and practitioners from Jewish, Catholic, African American, Evangelical and Protestant backgrounds. Non-profit scholars and practitioners associated with this organization convened a series of meetings regarding formulating a research agenda on this issue starting in November 2001. Participants envisioned a program that would compare the experience of organizations from several religions, as well as agencies founded by different racial and ethnic communities. The current project includes an interdisciplinary team of scholars and practitioners from across the United States associated with several faiths working on similar issues (see project board,   key staff, and product advisory committee, appendix I). Overall, the Faith and Organizations Project has two goals:

❖ **Helping policy makers and researchers clarify the meaning of faith based service as well as its role in social service and health provision in the United States.**

❖ **Assisting faith communities and non-profits founded under religious auspices to:**

   o **Understand the unique differences among organizations founded by different religions;**

   o **Clarify the appropriate relationship between non-profits and their founding communities for that religion and culture;**

   o **Understand ways that religious beliefs and practices are reflected in the organization and determine ways to share founding values with staff and board members who do not come from the founding religion, culture, or both;**

   o **Determine ways to best safeguard the civil rights of all program participants, regardless of religion and other characteristics;**

   o **Clarifying the meaning of separation of church and state within organizations founded by faith communities.**

In its initial planning period, the project developed four general areas of study. The pilot project provided some initial insight on all of these questions and the current *Connections* study focuses on the first question:

❖ **The relationship between founding communities and organizations.** This research concentrates on the connection between non-profit organization mission and its faith community or secular culture, dynamic ownership of the organization by its founding community, the ways that faith influences the nature of non-profit activity, and the ways the non-profit activity affects the founding community. As such, the project examines both the impact of founding community civic engagement, spiritual, cultural, and social capital on the non-profit and the ways that service provided by the organization helps build civic engagement, social capital and cultural or religious values for its founding community.

Social capital refers to networks based on reinforceable trust that enable people or institutions to access resources they need to meet their goals.

❖ **The relationship between the non-profit organization and the people that use their services.** Questions on this topic compare services provided to people from the same community versus people from another religion, racial, ethnic, immigrant group or class background. As such, research looks carefully at church/state questions raised by the President's Faith Based Initiative. Research also potentially provides new insights for debates among social service academics and practitioners regarding the importance of providing services through organizations from within a particular subset of a locality like ethnic, racial, immigrant founded organizations versus service provision by larger, city-wide social service institutions.

❖ **The impact of founding community culture and social capital systems on non-profit mission, organizational structure, staffing, and program design.**

❖ **The impact of the larger socio-economic and policy systems, as well as the common strategies among non-profits providing a particular type of service, on non-profit goals and strategies.**

Over the next few years, funding permitting, we hope to focus on all four questions in more depth. We also hope to expand the project to research nationally and internationally.

Appendix B: Staff and Advisory Committee Structure and Bios

The key staff for this project shares a combination of training in social science, practical experience translating research into practical tools and programs and religious backgrounds. Our interdisciplinary team includes anthropologists, sociologists, community psychologists, social workers and scholars of inter-organizational dynamics. Over half are ordained clergy or members of religious orders and most of the remainder are active in their faiths. The project researchers work together as a team, with the aid of advisory committees, including a combination of academics, practitioners and religious leaders, to carry out this project.

Research Team

Principal Investigator:	Jo Anne Schneider
Assessment Instrument:	Wolfgang Bielefeld, Dennis McGrath
Mainline Protestants:	John Belcher, Isaac Morrison, Suzanne Paszly, Kevin Robinson, Leslie Rubin, Mika Settlemoir, Jill Sinha, Terry A. Wolfer Abby Byrnes
Evangelicals:	John Belcher, Isaac Morrison, Laura Polk, Terry A. Wolfer, Tina Zarpour
Catholics:	Pat Wittberg, W. Gerard Poole, Theresa Murzyn, Atiya Aburrahman
African American Church:	Barbara Blount Armstrong, Marci Bounds Littlefield, Jill Witmer Sinha,Terry A. Wolfer
Quakers:	Jo Anne Schneider, Meg Boyd Meyer
Jews:	Jo Anne Schneider, Leslie Rubin, Jonathan Corrado

Project Advisory Committee

Co-Chairs

Ram Cnaan - Associate Dean for Research, Professor, and Chair of the Doctoral Program in Social Welfare at the University of Pennsylvania; Director of the Program for Religion and Social Policy Research

Gretchen Castle - Chief Organizational Development Officer, Recording for the Blind and Dyslexic

Committee Members

Core Advisory

Stephanie Boddie – Senior Research Fellow at the Pew Research and Senior Fellow at the University of Pennsylvania's Program for Research on Religion and Social Policy.

Stanley Carlson-Thies – President, Institutional Religious Freedom Alliance

David Gamse - Executive Director of the Jewish Council for the Aging (JCA) and Chief Executive Officer of the National Center for Productive Aging

Lenneal Henderson – Distinguished Professor, University of Baltimore

William Taft Stuart – Assistant Professor, Department of Anthropology, University of Maryland College Park

Additional Advisors

Diana Garland – Inaugural Dean, School of Social Work at Baylor University

Maurine Pyle - Field Secretary of Illinois Yearly Meeting of the Religious Society of Friends

William C. Rickle, SJ - Provincial Assistant for Latino Ministries of the Maryland Province Jesuits) and Director of the Jesuit Institute on Migration, Culture and Ministry at Loyola College in Maryland; President of the Jesuit Hispanic Ministry Conference

Rhys Williams - Professor and Department Head of Sociology at the University of Cincinnati

James Zabora - Dean of the National Catholic School of Social Service and Professor of Social Work

Product Dissemination Advisory Committee

Co-Chairs

David Gamse - Co-Chair, Executive Director of the Jewish Council for the Aging (JCA)

Elliott Wright - Information officer and public spokesman for the United Methodist General Board of Global Ministries.

Committee Members

Richard Bass - Director of Publishing for the Alban Institute, editor of *Congregations*, Alban's quarterly magazine.

Stephanie Boddie - Senior Research Fellow at the Pew Forum on Religion and Public Life,

Stanley Carlson-Thies - Founder and President of the Institutional Religious Freedom Alliance, Senior Fellow of Social Policy Studies at the Center for Public Justice

Alvin C. Hathaway - Pastor of Union Baptist Church

Michael Hoffman - Vice President of Community Planning & Allocations at The Associated: Jewish Community Federation of Baltimore.

Matt Micciche - Head of School at the Baltimore Friends School.

Edward Orzechowski - President and Chief Executive Officer of Catholic Charities of the Archdiocese of Washington, D.C.

Ronald Edward Peters - Henry L. Hillman Professor of Urban Ministry at Pittsburgh Theological Seminary and founding Director of the Seminary's Metro-Urban Institute,

Jon Singletary - Director of the Center for Family and Community Ministries and Associate Professor in the School of Social Work at Baylor University. He is also co-director of the Strengthening Congregational Community Ministries Project

Heidi Rolland Unruh - Director of the Congregations, Community Outreach and Leadership Development Project

Jeremy White - Founder and President of RestoreHope Consulting, Senior Fellow at the University of Pennsylvania's Program Research on Religion and Urban Civil Society.

Avi West - Director of the Shulamith Reich Elster Resource Center, and a Master Teacher at the Partnership for Jewish Life and Learning

Staff Biographical Information

Barbara Blount Armstrong Most recently held the position of Chief Operating Officer of Associated Black Charities and served for a period in the role of Interim President and CEO. Ms. Armstrong led the administration of the U.S. Department of Health and Human Services Compassion Capital Program and the Ryan White Title I HIV/AIDS Program, for which the organization served as an intermediary providing funding, technical assistance and capacity building services to faith- and community-based organizations, as well as to other agencies and institutions. She also coordinated collaboration with the Maryland Department of Human Resources, Baltimore City Government, the Baltimore City Field Office of HUD, the Baltimore African American Real Estate Professionals, faith leaders and others in the design and implementation of the Faith Academy, a capacity building initiative for the faith community. This initiative was the outgrowth of dissemination of the organization-led Church-Based Study of Human Services. A former university administrator at a number of institutions around the country, Ms. Armstrong holds a Master of Education degree in Counseling and Guidance from Howard University, has completed doctoral courses in Higher Education Administration at Nova Southeastern University and is currently pursuing a Doctorate in Public Administration at the University of Baltimore.

John Belcher, M.Div., MSW, Ph.D., LCSW-C., is a Professor at the University of Maryland, School of Social Work. He has taught at the University for 22 years. John has published over 79 articles and has participated on several funded grants. He also teaches at St. Mary's Seminary and University Ecumenical Institute (EI). He has taught at EI for 8 years. Among the courses he teaches at both schools are qualitative methods, social policy, psychopathology, pastoral counseling and sociology and theology. Before receiving his Ph.D. at the Ohio State University; John worked as a therapist in Wyoming. He also received his Masters in Divinity at Lexington Theological Seminary and a Masters in Social Work at the University of Kentucky. John is ordained in the Disciples of Christ and he served as a pastor for three years. In addition to teaching, John currently does research in the area of faith based programs, is an active pastoral counselor and is active at Woods Church, Presbyterian Church (U.S.A.).

Wolfgang Bielefeld is Professor of Public and Environmental Affairs, Adjunct Professor at the Center on Philanthropy, and Adjunct Professor of Sociology at Indiana University - Purdue University, Indianapolis. He is co-author with Sheila Kennedy of *Charitable Choice at Work: Evaluating Faith-Based Job Programs in the States* (Georgetown University Press, 2007). He coauthored, with Joseph Galaskiewicz, *Nonprofit Organizations in an Age of Uncertainty: A Study of Organizational Change* (Aldine de Gruyter, 1998). He is co-editor of *Nonprofit and Voluntary Sector Quarterly.* Dr. Bielefeld specializes in organization theory and has done research on nonprofit organizations for over 20 years. His research has been funded by the National Science Foundation, the Urban Institute, the Program on Non Profit Organizations at Yale University, and the Aspen Institute. His current research agendas include: the origin, extent and consequences of the distribution of nonprofit sub-sectors over metropolitan areas; the spatial patterns of metropolitan nonprofit and for-profit organizations; the organizational, economic, and political dynamics in local human service delivery systems; the contributions of nonprofits to social capital in communities and the involvement of faith based organizations in service delivery. His research interests include the relations between nonprofit organizations and their environments, the dynamics of nonprofit sectors, the development of human service delivery systems and the social impacts of government human service policies and spending patterns.

Marci Bounds Littlefield earned her Ph.D. in Sociology from the University of Texas at Austin, Master of Public Affairs from the Lyndon B. Johnson Graduate School of Public Affairs and Bachelor of Arts from Oberlin College. Ms. Littlefield is currently an Assistant Professor of Sociology and Research Fellow for the Center for the Study of Religion and American Culture at Indiana University Purdue University in Indianapolis. She is published in areas which include Black women, the media and the Black church and is funded to research faith based organizations in Indianapolis. Dr. Littlefield's current book project investigates marriage in the African American Community.

Dennis McGrath received his Ph.D. from the University of Maryland in 1983. He was trained in research methods and advanced statistics at the University of Maryland and the University of Michigan. He has gone on to teach these subjects to graduate students and to apply his knowledge in solving a wide variety of research problems faced by state and local government officials. Since joining the Schaefer Center for Public Policy in 1993, Dr. McGrath has specialized in statistical analysis, performance measurement and program evaluation. For the past six years he has helped the Quality Control Division of the Family Investment Administration of Maryland=s Department of Human Resources address sampling and statistical analysis issues. He has helped create and implement a program that trains Maryland state officials in techniques of performance measurement. He has helped develop performance measures for the Family Investment Administration of the Department of Human Resources and other agencies. He has coordinated the data analysis for Maryland's statewide welfare reform, the Primary Prevention Initiative. He led the evaluation of Maryland's Vehicle Theft Prevention Programs. He has led an evaluation of a Maryland program that sought to get mothers at risk of losing their children due to substance abuse problems into appropriate and timely treatment. In the years before joining the Schaefer Center, Dr. McGrath taught courses at the University of Baltimore and the University of Maryland in Quantitative Analysis and other subjects. At various times during those years, he also served as a data consultant, doing survey design, data collection, and data analysis for the Sunset Review Board the Maryland Department of Fiscal Services, the Institute for Governmental Services at the University of Maryland and the AFL-CIO Committee on Political Education

Meg Boyd Meyer, Ph.D. (University of Texas at Austin, 1979), is a community psychologist with a long career in nonprofit management and leadership in value-based social service organizations. She has worked internationally for the United Methodist Church; locally, regionally and nationally for the American Friends Service Committee and served as an active volunteer in program and governance work for local congregations of United Methodists and Friends (Quakers). Meg has served as staff and/or provided training and consultation to boards of health services and retirement communities sponsored by faith groups. She has extensive experience developing and delivering adult education experiences in faith based settings, ranging from short programs to extended conferences.

Isaac Morrison received his MA in Anthropology and International Development from The George Washington University in Washington DC (2009) and his BA in Cultural Anthropology from the University of Maryland in College Park, MD (2006). His current research focus is on transnational networks of culture and technology between the United States and the Middle East. In addition to his work as Coordinator for Analysis on the Faith and Organizations project he teaches Cultural Anthropology at Montgomery College, Ceramic Methods for the Practicing Archaeologists at Baltimore Clayworks, and History of the Modern Middle East at the Baltimore Free School. He is currently developing a series of films on Middle Eastern Hip-hop culture.

Theresa Murzyn is a summa cum laude graduate of Boston University with a degree in film production and a concentration in history. She has enjoyed working for more than eight years as a freelance video editor producing documentary programming. Theresa plans to return to school for a doctoral degree in anthropology and is applying for fall 2010 admission. Her interests lie at the nexus between the emotional, physiological and behavioral effects of acceptance and rejection in peer groups; nonverbal communication; and visual anthropology. Ms. Murzyn is a practicing Catholic who resides in Washington, DC.

Laura Polk graduated from Eastern Mennonite University with a degree in Psychology. After graduation she volunteered with the Presbyterian Church (USA) in Seattle and taught English to refugee women. She also interned at the Presbyterian Church (USA) headquarters, recruiting young adults to the service learning programs. She recently completed an internship with the Presbyterian Church (USA) Washington legislative office on Capital Hill, researching the impact of immigration policies on African immigrants in the Washington D.C. area. She is currently a second-year Master's student in Applied Anthropology at University of Maryland, College Park. Her research interests are African Diasporic identities in the U.S. and intersection of Christianity with race, gender, politics, and social justice.

W. Gerard Poole received his PhD in Ethnomusicology and Ritual Studies from the University of Maryland, 2007. His dissertation on "El Rocio: A Case Study on Music and Ritual in Analusia" (2007) introduced a theory of ritual and cultural generation that focuses on the religious experience itself, and the powerful force it exerts on social and religious evolution. His ethnographic video "Dissonant Images and the Structures of Passion" (2004), emphasized the critical roles that lay communities play in the health and vitality of Andalusian Catholic ritual. He gave a paper at the Ritual Dynamics conference in Heidelberg, Germany in the fall of 2008 emphasizing the critical roles that lay communities play in the health and vitality of religious ritual.

Kevin Robinson has a B.A. in Anthropology from the University of Maryland. His honors thesis focused on the religion of Islam and the radical organizations associated with the religion. He has also done extensive research on Scientology and other New Religious Movements.

Jo Anne Schneider is an applied anthropologist, focusing on the role of government, nonprofits, churches and communities in social welfare policy, opportunity structures for marginalized populations and inter-group relations. She is currently an Associate Research Professor in Anthropology at University of Maryland College Park and a Research Professor in Anthropology at George Washington University. She was American Association for the Advancement of Science and Technology Policy fellow at NIH (2003-2005). Her career combines equal experience in research, nonprofit management and consulting and public policy. Most of her experience involves working with religious communities and nonprofits, including dissertation research on refugee resettlement by Jews, Catholics, and mainline Protestants, projects on community relations that involve faith communities from various backgrounds, developing both research and faith based programs under the care of Philadelphia Quarterly Meeting of the Religious Society of Friends and working on Michael Foley and Dean Hoge's Religion and the New Immigrants Study (2001-2002). She has served as director of the Faith and Organizations Project since its commencement. She has published in the fields of Anthropology, Sociology, Urban Studies, Nonprofit management, Policy, Social Work and Health, including her second book, *Social Capital and Welfare Reform: Organizations, Congregations and Communities* (Columbia University Press, January 2006). Other recent publications include lead editor for the American Anthropologist special issue on welfare

reform (September 2001); *The Role of Social Capital in Building Healthy Communities: Policy Paper Produced for the Annie E. Casey Foundation* (www.aecf.org, November, 2004) and special issue editor and author of article on multi-methods ethnography for Research to Practice: An Interdisciplinary Conversation on Research Methods for Non-profits, Special Issue *Nonprofit Management and Leadership* (July 2006)*.*

Jill Witmer Sinha, Ph.D. (2004, University of Pennsylvania, School of Social Policy and Practice) is an Associate Professor in the School of Social Work with Rutgers, the State University of New Jersey. She studies the relationship between public sector funding and non-government organizations in social service provision with a special interest in faith based and religious organizations; youth development in a community context and collaborative program evaluation using a participatory approach. Recent publications include *Adolescent risk behaviors and religion: Findings from a national study* (Journal ofAdolescence, 2007, with R. Cnaan and R. Gelles) and *Youth at Risk for Truancy Detour Into a Faith-Based Education Program: Their Perceptions of the Program and Its Impact* (Research on Social Work Practice, 2007). Her current projects include survey research among nonprofits in Kolkata, India, secondary analysis of national data on youth, religion, and substance use and volunteer behavior among members of ethnic congregations

Heidi Rolland Unruh is Director of the Congregations, Community Outreach and Leadership Development Project, which has contributed to the development of a typology of faith-based organizations and a framework for exploring the relationship between faith and social services. Books Unruh has co-authored include *Hope for Children in Poverty* (Judson, 2007); *Saving Souls, Serving Society: Understanding the Faith Factor in Church-Based Social Ministry* (Oxford University Press, 2005)*;* and *Churches That Make a Difference* (Baker, 2002)*.* Additionally she has contributed to several books on faith-based initiatives, among them *Sanctioning Religion* (Rienner, 2005) and *What's God Got To Do with the American Experiment?* (Brookings, 2000). She also served on the drafting committee of the statement "In Good Faith: A Dialogue on Government Funding of Faith-Based Social Services" (2001). Heidi lives in Hutchinson, Kansas as a trainer, consultant and researcher working to develop curricula and resources for churches seeking to strengthen their involvement in community service. Practical resources for churches and ministry leaders that she has helped to develop include the CD-ROM workbook *Becoming a Church That Makes a Difference: Ventures in Holistic Ministry,* and a set of online guides to church and community assessment and ministry planning. Current consulting collaborations include World Vision and the Compassion Coalition (Knoxville, Tenn.). This work has included helping to develop an annual Research Summit on Community Transformation, bringing together faith-based community practitioners and researchers. Unruh serves on the Editorial Advisory Board of the *Journal of Family and Community Ministries* (Baylor University), and is the Public Policy editor for Evangelicals for Social Action. She is an alumna of Wheaton College and has a M.A. in Theology and Public Policy from Palmer Seminary (formerly Eastern Seminary, in Philadelphia).

Patricia Wittberg is a Roman Catholic Sister of Charity and a Professor in the Department of Sociology at Indiana University - Purdue University Indianapolis. She has written extensively on the topic of Catholic religious orders and their relationships to the schools, hospitals and social service institutions they sponsor. Her most recent publications include *From Piety to Professionalism - And Back?* (Lexington Books 2006), "Religious Orders and Higher Education" (in *Handbook of Research on Catholic Higher Education*, Information Age Publishing 2003), "Called to Service: the Changing Institutional Identities of American Denominations" (*Nonprofit and Voluntary Sector Quarterly* 29:357-376, 2000) and "Declining Institutional Sponsorship and

Religious Orders: A Study of Reverse Impacts" (*Sociology of Religion* 61:315-324, 2000). Her current projects include studying the declining interest in sponsoring hospitals, schools, or social service organizations among the newly-founded Catholic religious orders.

Terry A. Wolfer, PhD, is Associate Professor in the College of Social Work, University of South Carolina where he teaches masters courses on micro practice, macro practice, and research and evaluation, and a doctoral course on qualitative research. His research has focused primarily on religion and spirituality in social work practice (including a Lilly-funded study of faith-motivated volunteers) and on social work education. Bridging the two areas, a current project involves placing graduate social work students in religious congregations for field placements focused on older adults. He has authored numerous decision cases on social work practice and co-edited several collections of decision cases including: *Spirituality and Religion in Social Work Practice* (Council on Social Work Education, 2002), *Decision Cases for Generalist Social Work Practice* (Brooks/Cole, 2006), *Decision Cases for Advanced Social Work Practice* (Brooks/Cole, 2006), and *Dying, Death and Bereavement in Social Work Practice* (Columbia University Press, 2008). He is editor of *Aretê*, Associate Editor of *Social Work & Christianity*, and serves on the editorial boards of *Journal of Religion and Spirituality in Social Work* and *Journal of Social Work in End-of-Life & Palliative Care.*

Advisory Committee Biographical Information

Stephanie Boddie is a Senior Research Fellow in religion and social welfare at the Pew Forum on Religion & Public Life. Prior to joining the Pew Forum, she was an assistant professor at Washington University in St. Louis with a primary appointment at the George Warren Brown School of Social Work as well as an appointment with Urban Studies and another with African and African American Studies. Additionally, she is a Senior Fellow at the University of Pennsylvania's Program for Research on Religion and Social Policy. She served as lead consultant for the Annie E. Casey Foundation's Faith & Families portfolio from 2002-2006. In this capacity, she assisted in knowledge development as well as capacity building for faith and community leaders on several issues, including Healthy Families and Healthy Marriage, Asset Building and Healing Communities. She also provided leadership and organizational development for faith partners in the Making Connection sites. As a scholar, her primary research interests are public – private partnerships, including faith based initiatives, asset building strategies and other community development in low-income/ low-wealth communities. She has primarily studied Black and Korean American churches of various faith traditions. Dr. Boddie is co-author of *The Newer Deal: Social Work and Religion in Partnership (1999), The Invisible Caring Hand: American Congregations and the Provision of Welfare (2002), Way to Give: A Guide to Connecting Giving & Asset Building (2005), The Other Philadelphia Story: How Local Congregations Support Quality of Life in Urban American (2006), Faith-based Social Services: Measures, Assessments, and Effectiveness (2007)* and 30 other publications. She is currently lead investigator of the Black Churches component of the *Mapping the Du Bois Philadelphia Negro Project* and the *Glasgow Community Improvement Research, Teaching, and Service Project.* Stephanie received her doctorate in Social Welfare and master's in social work from the University of Pennsylvania and her bachelor's degree in natural science from Johns Hopkins University.

Stanley Carlson-Thies is Founder and President of the Institutional Religious Freedom Alliance, a Washington, DC-area nonpartisan think tank that focuses on safeguarding the religious identity and faith-shaped standards and services of faith-based service organizations. He was Director of Social Policy Studies at the Center for Public Justice, where he remains a Senior Fellow. He served with the White House Office of Faith-Based & Community Initiatives and assisted with writing a report on the initiative released by the White House in August 2001, and the initial blueprint for President George W. Bush's faith and community agenda. His doctorate in political science is from the University of Toronto.He also helped to organize and guide the work of the five initial cabinet centers for faith-based and community initiatives. He consults widely with government agencies, including the federal Department of Health and Human Services, the Corporation for National and Community Services, state service commissions, and state offices of faith-based and community initiatives. He is the author of: *Charitable Choice for Welfare & Community Services: An Implementation Guide for State, Local, and Federal Officials* (Center for Public Justice, 2000); *A Guide to Charitable Choice: The Rules of Section 104 of the 1996 Federal Welfare Law Governing State Cooperation with Faith-based Social-Service Providers* (a co-publication of the Center for Public Justice and the Center for Law and Religious Freedom of the Christian Legal Society, 1997); *The Freedom of Faith-Based Organizations to Staff on a Religious Basis*, with Carl Esbeck and Ron Sider (Center for Public Justice, 2004); "Implementing the Faith-Based Initiative" in *The Public Interest* (Spring 2004); *Revolution of Compassion: Faith-Based Groups as Full Partners in Fighting America's Social Problems*, with Dave Donaldson (Baker Books, 2003). He was a co-drafter of the statement *In Good Faith: A Dialogue on Government Funding of Faith- Based Social Services* (Feinstein Center for American Jewish History, Temple University, 2001).

Carlson-Thies received the William Bentley Ball Life and Religious Liberty Defense Award from the Center for Law and Religious Freedom and the Christian Legal Society in October, 2004. He was named as one of twelve advocates who are "reinterpreting God and country" by the *National Journal* in May, 2004. He holds a doctorate in political science from the University of Toronto. His dissertation is on the role of Protestants and Catholics in the development of Dutch politics in the 19th and 20th centuries. Besides the United States, he has lived in Canada, the Netherlands, and Japan, where he was born of missionary parents.

Gretchen Castle is now Chief Organizational Development Officer, Recording for the Blind and Dyslexic. Previously, she was   Director of Leadership Development and Training for Friends Services for the Aging where she facilitates collaboration among Quaker senior service providers and organizational improvement. Promoting best practices in Quaker non-profit governance structures, she supports boards in leadership development, transition planning, strategic planning, and articulating values-based organizational identity. She works with staff to encourage organizational health, personal development, and interpersonal effectiveness. With a M.Ed. in Psychoeducational Processes, now called Adult and Organizational Development, from Temple University, Gretchen has twenty years of organization development consulting and training experience. She specializes in board development, strategic planning, conflict management, meeting facilitation, and interpersonal skills. An active Quaker, Gretchen has provided assistance to many Quaker organizations, from facilitating supervisory training to conducting workshops on spiritual decision-making.

Ram Cnaan is the Associate Dean for Research, Professor, and Chair of the Doctoral Program in Social Welfare at the University of Pennsylvania. He is also the Director of the Program for Religion and Social Policy Research. Dr. Cnaan is a world-renowned expert in studying faith-based social services. He carried out the first national study on the role of local religious congregations in the provision of social services as well as the first one-city census of congregations. Dr. Cnaan has published numerous articles in scientific journals on a variety of social issues. In addition, he serves on the editorial board of seven academic journals. He is the author of: *The Newer Deal: Social Work and Religion in Partnership* (Columbia University Press, 1999) and: *The Invisible Caring Hand: American Congregations and the Provision of Welfare* (New York University Press, 2002). His forthcoming book, *The Other Philadelphia Story: How Local Congregations Support Quality of Life in Urban America* (University of Pennsylvania Press) deals with congregations in one large city. In addition, along with Stephanie Boddie (Washington University), he edits *Assessing the Impact of Faith-Based Social Services: Methodological Challenges and Practical Solutions* (Haworth Press).

Jessica I. Elfenbein is a University of Baltimore professor and director of the undergraduate program, c*ommunity Studies and Civic Engagement (CSCE),* Division of Legal, Ethical and Historical Studies and Director of the Center for Baltimore Studies as well as Associate Provost for University Engagement. She received her Ph.D. from the University of Delaware. Woven into the CSCE major is American Humanics (AH), a national competency-based certificate program that prepares students for professional opportunities in community-serving nonprofit organizations. Dr. Elfenbein currently serves as University of Baltimore's campus executive director of AH and thus works with AH's 18 nonprofit partners to develop internships, curriculum and service-learning opportunities. She has published three books and several articles. Her research interests are at the intersection of religious, urban and philanthropic history, and her work has been recognized by groups such as the University System of Maryland Board of Regents, the American Academy of Religion, the Association for Researchers of Nonprofit

Organizations and Voluntary Action, the Louisville Institute and Aspen Institute's Nonprofit Sector Research Fund.

David Gamse, a gerontologist with undergraduate degrees in psychology and sociology, is the Executive Director of the Jewish Council for the Aging (JCA) and, concurrently, the Chief Executive Officer of the National Center for Productive Aging, a JCA affiliate. Prior to joining JCA's staff in 1990, he was a senior manager at AARP, responsible for different positions for the development of new AARP educational and service programs and for AARP programs related to the aging work force. He is a frequent speaker on aging and nonprofit association management and is a member of the Executive Council of Jewish Agencies in the Greater Washington, D.C. region.

Diana Garland is inaugural Dean of the School of Social Work, Baylor, Waco, Texas. She previously served as Professor of Social Work at The Southern Baptist Theological Seminary in Kentucky and was Dean of the Carver School of Church Social Work. Prior to teaching, she was employed as administrative director of a pastoral counseling center. She has also been employed as a clinical social worker in a rural community mental health center and in a Baptist children's home. Dr. Garland is author, co-author. Or editor of seventeen books. The most recent is Sacred Stories of Ordinary Families: Living the Faith Everyday (Jossey-Bass, Inc., 2003). Her book Family Ministry: A Comprehensive Guide (InterVarsity press) was winner of the 2000 Book of the Year Award of the Academy of Parish Clergy.

Lenneal Henderson is a distinguished professor of government and public administration and a senior fellow at both the Schaefer Center and the Hoffberger Center for Professional Ethics at the University of Baltimore. He has also served as a faculty member at the School of Human and Organizational Development and at the School of Educational Leadership and Change at the Fielding Graduate Institute. He received his A.B., M.A. and Ph.D. degrees from the University of California, Berkeley. Dr. Henderson was recently selected as a Fulbright Senior Specialist by the Council on the International Exchange of Scholars and the U.S. Department of State. He is an internationally recognized urban scholar and has lectured and consulted on housing issues, energy management, environmental policy and public management for federal, state and local government and the corporate and nonprofit sectors for more than 30 years. He completed a study of the Baltimore CitiStat program and his CitiStat monograph was published in 2005 as a chapter in the book Managing for Results. He has served as the Chairman of the Board of the Baltimore Urban League and serves on the Boards of the Baltimore Urban League, the Chesapeake Bay Foundation, the National Civic League, The Center for Effective Local Democracy and the Caroline Center, a Catholic social services agency. He is Vice-Chairman of the Maryland Commission on African American History and Culture and a member of the Board of Directors of the Reginald Lewis Maryland Museum of African American History and Culture. He is also a member of the Board of Directors of Associated Catholic Charities of Central Maryland. Dr. Henderson was recently admitted into the National Academy of Public Administration.

Maurine Pyle serves as Field Secretary of Illinois Yearly Meeting of the Religious Society of Friends and as a member of the Traveling Ministries Program for Friends General Conference (Quakers). She has served a presiding clerk for Illinois Yearly Meeting. Her areas of professional specialization are: leadership development, change management, adult education/training, conflict resolution and community development.

William T. Stuart, Ph.D. is the Chair of the Council for University System Faculty and Professor of Anthropology at the University of Maryland, College Park. From 2000-2009 he was Director at the Research Science Institute (RSI), Center for Excellence in Education (CEE), Vienna, VA He has conducted extensive research in the Middle East, Latin America, Central and Southern Africa, Eastern Europe and Oceania. He has written widely on comparative religion, new religious movements and the origins and effects of fundamentalism. Dr. Stuart also dedicates an significant part of his time to developing innovative educational systems.

Rev. William C. Rickle, S.J., Ph.D. did graduate studies in theology at Loyola University, Chicago and Mexico City, Mexico and in sociology at the New School for Social Research, New York and Temple University, Philadelphia where he earned the Ph.D., with a specialization in Race and Ethnic Relations and the Sociology of Religion. He studied and worked in the Dominican Republic, Mexico, Chicago, Spain and New York, taught sociology at St. Joseph's University, Philadelphia, been director of Pastoral Care for Migrants and Refugees, Archdiocese of Philadelphia, pastor of Old St. Joseph's Church in that city and Field Specialist with the National Office of Jesuit Social and International Ministries. He was the North American resource person on Hispanic ministry and migration issues for the first Joint Meeting of the North American and Latin American Jesuit Provincials in May, 2004, which saw the adoption of a common plan for addressing the pastoral, research and advocacy needs associated with hemispherewide migration. Fr. Rickle is currently the Provincial Assistant for Latino Ministries of the Maryland Province Jesuits (Pennsylvania to North Carolina) and Director of the Jesuit Institute on Migration, Culture and Ministry at Loyola College in Maryland. He is the President of the Jesuit Hispanic Ministry Conference and serves on steering committees of the U. S. Jesuit Universities Migration Studies Network, of the Latin American and Latinos Studies Program at Loyola College, and of the Maryland-Chile and Maryland-Bolivia Province Twinning Committees. He currently serves on the Board of Directors of CARA, the Center for Applied Research in the Apostolate at Georgetown University, in Washington, DC.

Rhys H. Williams is Professor and Department Head of Sociology at the University of Cincinnati. He is co-author of *A Bridging of Faiths: Religion and Politics in an American City* (Princeton, 1992) and coeditor of *Sacred Companies: Organizational Aspects of Religion and Religious Aspects of Organizations* (Oxford, 1998). He is editor of the *Journal for the Scientific Study of Religion.*

James Zabora, the Dean of the National Catholic School of Social Service and Professor of social Work, came to the Catholic University of America after a 20 year career at the Johns Hopkins University School of Medicine. Prior to Johns Hopkins, Dr. Zabora served as Associate Director of the Southeast Baltimore Drug Treatment Program which delivered innovative treatment modalities to narcotic addicts and poly-drug users. At Johns Hopkins, he was an Assistant Professor of Oncology in the School of Medicine with two secondary appointments as an Assistant Professor in the School of Public Health in Environmental Health Sciences & Health Policy and Management. As an administrator, he served as one of the five Associate Directors in the Comprehensive Cancer Center with a special focus on community programs and research. In addition, he was the administrator of the Breast and Cervical Cancer Screening Program for low-income women living in Baltimore City. In this role, he was a lead author of the Baltimore City Cancer Plan for Johns Hopkins under the Cigarette Restitution Fund for the State of Maryland. As a result of the success of these initiatives, he was appointed Co-Director of the Baltimore City Cancer Plan, and Co-Director for Community Outreach and Education of the Urban Environmental Health Center in the School of Public Health. Currently, Dr. Zabora maintains a Visiting Professorship at Johns Hopkins, and his research continues to focus on

cancer prevention and control, psychosocial screening, problem-solving education, and quality of life among cancer patients and their families. Dr. Zabora is the Editor of the *Journal of Psychosocial Oncology,* and the author of more than 60 papers and book chapters on cancer prevention, psychosocial screening and community program development, quality of life, and problem-solving education. His research has won a number of awards at Johns Hopkins, and recently, his research team received the Annual Quality of Life Research Award from the National Office of the American Cancer Society. Over the past two years, Dr. Zabora has delivered ten keynote addresses at international, national, and regional health care conferences, and over the past twenty years, he has presented over 300 invited lectures across the United States, Canada, Asia, Australia, and Europe. Finally, in March of 2007 at the Annual Meeting of the American Psychosocial Oncology Society, Dr. Zabora received the Holland Distinguished Leadership Award based on his "outstanding contributions (in clinical practice, education, research and leadership) in the field of psychosocial oncology."

Product Dissemination Advisory Committee Biographical Information

Richard Bass, Director of Publishing for the Alban Institute, has worked for nonprofit and for-profit publishers for more than 30 years, including the Practising Law Institute, the United States Catholic Conference, and ABC-CLIO, where in the early 1990s he was one of the first to hold the title of director of electronic publishing. Bass joined the Alban Institute in April 2000 as the project director of the Congregational Resource Guide and became director of publishing in August 2002. He is the editor of *Congregations*, Alban's quarterly magazine, and has edited two collections of essays for congregations and their leaders.

Stephanie Clintonia Boddie, Ph.D., MSW, is a Senior Research Fellow at the Pew Forum on Religion and Public Life, specializing in trends and effectiveness in faith-based social services, faith communities' responses to social needs and faith-based initiatives, areas in which she has written extensively. Prior to joining the Pew Forum, she was an assistant professor at Washington University in St. Louis with a primary appointment at the George Warren Brown School of Social Work as well as an appointment with Urban Studies and another with African and African American Studies. She also served as lead consultant for the Annie E. Casey Foundation's Faith and Families portfolio. Her doctorate in social welfare and master's in social work are from the University of Pennsylvania and her bachelor's degree in natural science from Johns Hopkins University.

Stanley Carlson-Thies, Ph.D., is Founder and President of the Institutional Religious Freedom Alliance, a Washington, DC-area nonpartisan think tank that focuses on safeguarding the religious identity and faith-shaped standards and services of faith-based service organizations. He was Director of Social Policy Studies at the Center for Public Justice, where he remains a Senior Fellow. He served with the White House Office of Faith-Based & Community Initiatives and assisted with writing a report on the initiative released by the White House in August 2001, and the initial blueprint for President George W. Bush's faith and community agenda. His doctorate in political science is from the University of Toronto.

David Gamse, Co-Chair, a gerontologist with undergraduate degrees in psychology and sociology, is the Executive Director of the Jewish Council for the Aging (JCA). Prior to joining JCA's staff in 1990, he was a senior manager at AARP, responsible for different positions for the development of new AARP educational and service programs and for AARP programs related to the aging work force. He is a frequent speaker on aging and nonprofit association management, nationally and internationally, and is a member of the American Society of Association Executives, the Gerontological Society of America, the National Council on Aging, and the Executive Directors & Headmasters Council of Jewish Agencies in the metro Washington D.C. region. He also was an adjunct faculty member at the University of South Florida's Aging Studies Program, from which he graduated.

Alvin C. Hathaway, Sr., **Ph.D., M.Div.,** is the 10th Pastor in the 157 year history of Union Baptist Church, after serving for three years as the Assistant Pastor. Reverend Hathaway has a Ph. D. in Philosophy of Religion from The North Carolina College of Theology and Doctor of Ministry degree from the United Theological Seminary. He earned his Masters of Arts in Church Ministries and a Certificate in Urban Ministry from Saint Mary's Seminary and University. He is a graduate of The Harvard Divinity School's Summer Leadership Institute. He has a Bachelor of Arts in Religious Studies from The McKendree School of Religion.

Michael Hoffman is Vice President of Community Planning & Allocations at THE ASSOCIATED: Jewish Community Federation of Baltimore. He attended Yeshiva University.

Matt Micciche is Head of School at the Baltimore Friends School. He is leading the school in establishing stronger ties with public schools and the wider community. He serves on the board of the National Center for Independent School Renewal. Previously, he was on the faculty at the Wilmington Friends School in Delaware, where he taught English and Humanities courses and subsequently rose in rank, culminating in being named assistant head for academics. His B.A. was received from Amherst College, a M.A.T. from Tufts University and a M.A. from Middlebury College.

Edward Orzechowski, MSW, is President and Chief Executive Officer of Catholic Charities of the Archdiocese of Washington, D.C. He left the seminary to pursue a career as a social worker and early on worked with the Youth Corps of the Community Action program and in the area of child welfare. Prior to his work with Catholic Charities in D.C., he was the director of Catholic Charities in Tennessee. He is a founding member of the Greater Washington Center for Nonprofit Excellence. His M.S.W. was received from the University of Maryland.

Ronald Edward Peters, **Ed. D., M.Div**., is the Henry L. Hillman Professor of Urban Ministry at Pittsburgh Theological Seminary and founding Director of the Seminary's Metro-Urban Institute, an interdisciplinary program of religious leadership development for urban society. He has twenty years of experience as an urban pastor. He received the Bachelor of Arts degree from Southern University, the Master of Divinity degree from Gordon-Conwell Theological Seminary, and the Doctor of Education degree from the University of Massachusetts at Amherst.

Jon Singletary, **Ph.D., M.S.W., M.Div**., is Director of the Center for Family and Community Ministries and Associate Professor in the School of Social Work at Baylor University. He is also co-director of the Strengthening Congregational Community Ministries Project and has served as co-director of the Faith and Service Technical Education Network. He was pastor of a Mennonite congregation in Richmond, VA, and received a M.Div. at the Baptist Theological Seminary at Richmond, and his M.S.W. and Ph. D. at Virginia Commonwealth University.

Heidi Rolland Unruh, Director or the Congregations, Community Outreach and Leadership Development Project, has also served as a staff associate with Evangelicals for Social Action, specializing in faith-based initiatives and social welfare. She has researched and written extensively in these areas. She is a trainer and consultant for faith-based community development, and is developing practical ministry resources for churches. She has a degree in Theology and Public Policy from Palmer Seminary.

Jeremy White is the Founder and President of RestoreHope Consulting, which was created to address the on-going organizational needs of community helpers and healers. He served as the Special Assistant for Faith-based Policy Outreach/Associate Director for Outreach for the White House Office of Faith-Based and Community Initiatives. He also was a program and policy analyst for Public/Private Ventures of Philadelphia, a research organization focused on at-risk youth and education issues. Jeremy is a graduate of Princeton University where he majored in public affairs, concentrating on urban revitalization and economic development in the Woodrow Wilson School of Public and International Affairs and received a certificate in Spanish Language and Culture. He is currently a non-resident Senior Fellow at the University of Pennsylvania's Program Research on Religion and Urban Civil Society.

Avi West is the Director of the Shulamith Reich Elster Resource Center, and a Master Teacher at the Partnership for Jewish Life and Learning, and he is a faculty member of the Florence Melton Adult Mini-School, which is sponsored by the Partnership. He previously held the position of Executive Director for the Board of Jewish Education of Greater Washington after serving as both an educational consultant and then Associate Director there. He is also a member of the Coalition for the Advancement of Jewish Education (CAJE) and is a National Board member of the Association of Directors of Central Agencies (ADCA). He received a B.A. in Comparative Literature from Columbia University, and a Bachelor's degree of Hebrew Letters and an M.A. in Education from the Jewish Theological Seminary.

Elliott Wright, D.Min,, M.Div., Co-Chair, is the information officer and public spokesman for the United Methodist General Board of Global Ministries. He is a journalist and researcher whose work over the years has included specialized topics including religion and tax law, religion in public education, religious institutions and community economic development, and interfaith relations. Wright was senior vice president of the National Conference of Christians and Jews in the 1980s and a consultant to the International Council of Christians and Jews from 1985 through 2008. He did his undergraduate work at Birmingham-Southern College and received the M.Div. and D.Min degrees from Vanderbilt University, as well as did post-graduate work at the Harvard Graduate School. He is author or co-author of seven books and has published hundreds of articles on religion and its cultural contexts.

UNIVERSITY OF MARYLAND

Maintaining Vital Connections between Faith Communities and their Nonprofits
Overview Report on Project Findings