Organization Dharma:
Leading the In-Service Organization

by
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Every organization is a unique and distinctive configuration of people in relation to their world. Depending on the organization's specific purpose for existence, the value it sets out to create, for whom, by whom, in what working relationships and by which specific means, an *inherent* order and logic is created. This inherent order establishes specific bounds on what actions are appropriate or inappropriate, required or optional, allowed or forbidden, expected or surprising, relevant or irrelevant. Since we lack a robust term for this inherent order and logic in the English language, I have borrowed the Sanskrit term "dharma." (In borrowing the word, I do not intend to borrow anything else from the Hindu or Buddhist traditions; this use of "dharma" is purely practical and does not include any considerations of moral authority or "divine origin.")

Dharma is like gravity, inherent in our world whether or not we know about it or believe in it. Like gravity, it is fundamentally practical. We take dharma into account not because we *should*, but because we *must*. Acting in accord with dharma is crucial for success in any endeavor. Leaders are well advised to discern their organization's dharma, and act in accord with it. You can ignore dharma if you like, or even violate it, but that rarely results in a good outcome – and sometimes the results are very bad indeed. (For a recent very cogent example, see "The Dharma of Lending" at www.tonyputman.com)

One important type of organization that has proved especially challenging to lead effectively is the teachings-guided "In Service" organization, of which Animas Valley Institute (AVI) is a good example. (AVI has kindly granted permission to discuss some of its inner workings in this paper.) An "In Service" organization exists to support people in a specific process of growth and/or attainment. For example, AVI and all its parts exist to support people in becoming more fully human by living their own soul-centric life in the context of the more-than-human world; therefore, everything that happens in AVI should be in service of that process of growth and attainment.

In a teachings-guided organization, the process, methods and criteria of success are determined by an existing canon of work. This canon typically is associated with a specific individual, who frequently is involved with the organization as its founder or guiding light. The process and methods of AVI, for example, are rooted in the world-view put forth by Bill Plotkin (whose work shows a large, diverse and on-going set of influences; there is no implication here of guru-like infallibility, just that Plotkin is the initial source and final arbiter of AVI's mission.) What happens in AVI is fundamentally guided by these teachings.

Having said this, we have in fact said a great deal indeed. Bear with me while we unpack some implications as regards the organization dharma of AVI.

AVI consists of two groups: those who see themselves as part of the organization (guides, staff, board, etc.) and those who turn to AVI for programs to support their own growth and attainment – call them AVIites and clients, respectively. AVIites are individuals who are themselves actively involved in living their "more fully human" life, which includes supporting clients and each other. Thus, AVI is fundamentally an "in-service" organization, in which everyone's purpose *includes* being in-service of others.

Note how markedly this fundamental purpose contrasts with more traditional organizations in which the purpose is to carry out the will and serve the interests of a leader (king, general, owner) or a small elite group (shareholders, legislature, partners). Note further that *all* our traditional organizational structures and understandings were developed to maximize the effectiveness of these more traditional organizations. The design and success criteria for these traditional organizations were fundamentally and profoundly different from those of an in-service organization like AVI. For example, some key questions for anyone in a traditional organization are: "What is my job?" "Who do I work for and report to?" "Who works for and reports to me?" "Who are my peers, and what is their piece of the work?" Comparable key questions in an in-service organization are: "Who do I serve, and how do I best serve them?" "What do I need in order to serve, and who can help me get that?" "Who serves with me, and how do we best work together to serve?" These are profound differences, and not merely semantic. It is not surprising, then, that traditional organizational structures and understandings have proved to be at best a poor fit for organizations like AVI, and at times an active hindrance. Having the wrong organizational structure is somewhat like wearing shoes that are the wrong size: you can function, but at the cost of considerable discomfort and lost effectiveness. It's better to find shoes that fit and wear them.

As a way to get started, here are some key understandings of an organizational structure that fits the dharma of an in-service organization:

(1) People are responsible for their own service – and not for the service of anyone else.

(2) Some people's service consists fundamentally of serving those who serve.
(3) Authority is *vested in* and *held by* teams.
(4) Authority is *exercised by* individuals, who are empowered, responsible, accountable, and acting on behalf of the team.
(5) All teams are action teams.
(6) Teams are not committees.
(7) Guidelines and policy are different – both are needed, and it is important not to confuse one for the other.
(8) Input and requirements are different – both are needed, and it is important not to confuse one for the other.
(9) Feedback and approval are different – both are needed, and it is important not to confuse one for the other.
(10) Guidelines, input and feedback are free.
(11) Policy, requirements and approval are costly.

Here are some comments on those understandings:

(1) **People are responsible for their own service – and not for the service of anyone else.** The person who performs a piece of work is "in charge of" that work. Nobody can possibly be "in charge of" teaching except the actual teacher. I cannot be "in charge of" your service nor can you be "in charge of" mine. We can both talk as if you were in charge of my service and act as if it were so – but it's illusion, and will only result in diminishing the quality of my service. It's better to talk and act in ways that align with truth. Ultimate responsibility for the quality of a piece of work lies with the person who performs it. Everyone else can at best contribute to that quality.

(2) **Some people's service consists fundamentally of serving those who serve.** These people provide information, support, resources or whatever is needed to make it possible for others to serve. In traditional organizations these people are thought of as managers or leaders and are said to be "in charge of" some people. In an in-service organization people are "in charge of" themselves; leaders and managers fundamentally serve the people in "their" area so their people may serve others.

(3) **Authority is *vested in* and *held by* teams.** Authority, like any form of power, can be seductive to the ego. Individuals who see themselves as holding authority (a director, supervisor, leader, etc.) have a strong pull toward seeing themselves as "responsible for" and "in-charge of" other people and their work. They tend to personalize the authority: *I* am in charge, *I* set the direction, make the rules and decisions, and tell other people what to do. (I may do so with a sweet demeanor, but there is no doubt who is in charge.) If they are conscientious, they feel the weight of this responsibility and it can wear them down. This not in accord with the organization's dharma. The authority goes with the role and is only "on loan" to the individual. Fortunately, very few roles exist in isolation. The performance of one role is typically interconnected with the performance of others. Those serving in these roles need to be mindful of the effect they have on each other, and serve each other in serving. They form a team, which is the fundamental organizational unit of an in-service organization. Authority in an in-service organization is explicitly vested in and held by a team. Authority for a program, for example, is held by the program team, not individually by members of the team. Each guide is responsible for his or her own guiding; the team is responsible for the program.

(4) Authority is *exercised by* individuals, who are empowered, responsible, accountable, and acting on behalf of the team. Each team member has a portfolio of responsibilities which he or she is authorized to act on independently, on behalf of the team. The team makes a list of what needs to be attended to in order to accomplish its mission. Each major item on this list goes into someone's portfolio, and becomes that person's responsibility. The team meeting is devoted to reaching consensus on policy, guidelines and assignments, and to giving blessings to each team member for their portfolio responsibilities. These blessings can take many forms, including wisdom, compassion, enthusiasm, feedback, ideas and trust. Team members strive for shared wisdom in service, and strive to avoid dominance or control. Outside the team meetings, individuals can act independently on items in their portfolio with great enthusiasm, knowing they are empowered by the team and have their blessings and support.

(5) **All teams are action teams.** All teams exist to accomplish certain specific things (this is their "charter" or "mission"). Team members are those who are needed to accomplish the team's mission. Each is committed to carrying out some specific portion(s) of the team's work. Team members participate in the work of the team – without exception. Nobody should be on a team for mere communication or representation of a perspective; such individuals should be invited to participate in specific meetings when their wisdom is required and then allowed to use their time in teams where they do have an action commitment. Nor should individuals be on a team merely because that's where important decisions are being made that have an impact on that individual's work – give your wisdom and blessings, and let the team do its work. Teams meet as much as necessary and as seldom as possible, to do what is needed to enable the team members to carry out their responsibilities.

(6) **Teams are structured to maximize action and accountability.** "Committees" have developed a bad image, as places for endless discussion and rampantly flowering egos, largely because committees are rarely structured effectively. An In-Service team is *no*t that kind of committee. Each team member is *responsible* for the team's functioning. Each team has a coordinator, authorized by the team, who is *accountable* to the team for the team's functioning. Specifically, the coordinator ensures that the team is convened as needed, that it has an agenda and sticks to it, that it is well-facilitated and does not get side-tracked or bogged-down, that it faces the issues it needs to face. (Note that "ensures that" does not always imply "does" – others may be better suited to actually performing some of these tasks, like agenda setting or facilitation.) The coordinator also, on behalf of the team, is authorized to call each member to account for the performance of his or her portfolio commitments. (And the team itself must regularly and routinely call the coordinator to account for his or her performance as coordinator, giving the coordinator feedback and input.) The coordinator is not a director or supervisor, nor is he or she the coordinator of the *activity* (e.g. programs); the coordinator is merely the coordinator of the *team* (e.g. the programs team). The team must give the coordinator their blessings, including their wisdom, guidance and feedback, and their explicit agreement to be called to account by the coordinator. Without these blessings, the coordinator cannot serve effectively. Teams need someone who is known to people outside the team as the liaison or contact point: that is just one of many portfolio items, and may, or may not, be held by the coordinator.

(7) **Guidelines and policy are different – both are needed, and it is important not to confuse one for the other.** Guidelines are the distilled, contemplated wisdom of individuals who have experience regarding some decisions or actions, offered to those whose service requires them to make similar decisions or take similar actions. They are given as a blessing, to support people in making the best judgments and decisions, and in taking the most appropriate action. Guidelines should be followed if they apply to the situation and not followed otherwise, and no accounting is called for in either case. Policies are like guidelines, but with a difference: policies *must* be followed, and every exception requires a formal accounting. A policy is required when the likelihood is great that important guidelines will be frequently ignored, or the consequence of ignoring a guideline is severe. Beware of issuing "guidelines" that are treated as policy; this is a classic way of completely disempowering an organization. Say what you mean and mean what you say.

(8) Input and requirements are different – both are needed, and it is important not to confuse one for the other. Before a team or individual goes about acting on an activity, it should avidly seek input from those who may have ideas, information or concerns relating to the activity. These individuals should give their input gladly and freely, as blessings – and then give the authorized team blessings to do what they judge is best. But some "input" in fact cannot be ignored – it must be taken into account, or the result will be flawed. For example, a team developing a new guest registration software system *must* act on the input from housing regarding how rooms are assigned, or else the system will not work effectively. This type of "input" we call "requirements" and it is crucial to distinguish which is which. Treating requirements as mere input will produce flawed results; treating input as actual requirements will result in an unnecessarily long, painful and stiff process of getting results. Too often, people give input which they expect to be treated as requirements.

(9) **Feedback and approval are different – both are needed, and it is important not to confuse one for the other.** Feedback is input which comes at the other end of the activity – when concrete results or product can be seen. Again, feedback should be avidly sought as a means of improving either product or performance, and should be freely given, with blessings to use it in whatever way makes sense. Some "feedback", however, must be heeded – the performance or product *must* be altered accordingly. This type of feedback we call "approval." Again, it is important to not confuse feedback with approval – when people expect their feedback to be carry the weight of approval, the organization's ability to serve is greatly diminished. In general, build in only the most crucial approvals, or the In-Service organization will drown in them.

(10) **Guidelines, input and feedback are free.** The giver should treat them as gifts, give them freely and then let them go. The receiver should seek them avidly and treat them as gifts when received. When they are not heeded, no explanation is required from anyone.

(11) **Policy, requirements and approvals are costly.** They are strong restrictions on people's ability to perform their service, and require formal accounting for every instance in which they are not heeded. Keep policy, requirements and approvals to the bare minimum required – indeed, eliminate all but the most clearly crucial approvals, since approvals typically create bottlenecks that choke the flow of service. The "burden of proof" should be on those advocating a policy, requirement or approval process: unless it is clearly needed, don't do it.