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Institutional Leadership: Maintaining and Developing the 'Good' Organisation

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Introduction

Drawing on data from a case study in a faith-based health organisation (FBO), this chapter addresses how leaders work intentionally with values through forms of work. Such values work sheds light on critical functions of institutional leadership, namely the 'infusion of values', as coined by Selznick. Addressing the renewed interest in institutional leadership (Kraatz, 2009; Kraatz & Flores, 2015; Raffaelli & Glynn, 2015), the chapter utilises Selznick's identification of basic functions of institutional leadership (Selznick, 1957/1984, pp. 62–63) and elaborates how values work relates to mission, character and the embodiment of values in organisations. The discussion explores how leaders, through ongoing efforts and the recurring facilitation of processes, relate mission, values and character of the organisation.

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This chapter argues that values work enacts such value infusion. Selznick (1957/1984), unlike the more rational organisational contributions, emphasises that organisations consist of individuals and constitute a vibrant social scene. Institutionalisation intertwines with the organisation's development over time, shaping a distinctive history. In this process, leaders exert agency that is underexplored in institutional and values work research.

Institutional leadership concerns establishing and protecting institutional values and character. Its orientation is argued to be more towards self-maintenance and less leaning towards a future or change orientation (Washington, Boal, & Davis, 2008). Selznick, on the contrary, ends his essay by underscoring how institutional leadership requires strategies of change that realise the needs and aspirations of the organisation (Selznick, 1957/1984, p. 154). Some contributions actually address how leaders contribute to either institutional creation (Struminska-Kutra, 2018), maintenance through adaption (Askeland, 2014), change (Kraatz & Moore, 2002) or the fundamental practices of institutional leadership (Beaton, 2017). Leadership is important in understanding how values work contributes to development, extending the traditional conception of institutional leadership. Golant and colleagues show how managers contribute to a temporal consistency by contextualising inherited value commitments through identity work (Golant, Sillince, Harvey, & Maclean, 2015). Consistent with the intention of this book, and responding to the call to supplement research in institutional work (Hampel, Lawrence, & Tracey, 2015), this chapter addresses the *who* and *how* by exploring the work of leaders as intentional efforts of infusing values.

Institutional theory often represents a macro- perspective (DiMaggio & Powell, 1991; Meyer & Rowan, 1991). Yet, there was a parallel interest in the agentic and creative ways in which organisations and leaders inculcate and reflect their institutional pluralistic contexts (Suddaby, 2010). Organisations facing pluralistic institutional contexts constitute salient cases to study institutional leadership, responding to changing and/or contradicting external and internal audiences.

FBOs originated primarily to give expression to the social, moral and/or religious values of their founders and supporters (Jeavons, 1992).

They developed into voluntary or professional organisations, with self-imposed identities and missions derived from religious traditions and acting independently to promote the realisation of *the common good* (Askeland, 2011). Historically, religious organisations and FBOs played an influential role as carriers of values associated with the common good (Lorentzen, 1998; O'Neill, 1992), such as welfare provision, tending to the needs of the community and caring for the sick and needy (Fokas, 2011). FBOs in Scandinavia operate autonomously in relation to both religious communities and public agencies. Within a context of institutional pluralism (Kraatz & Block, 2017), FBOs are constituted and operating on the boundaries of differing fields. This encourages continuous work on mission, values and character (Kraatz, 2009), making leaders positioned to influence organisational evolution and character.

Empirical research illustrates the theoretical considerations of this chapter, by utilising publications from prior case studies at the Røysumtunet Foundation. Firstly, the chapter contributes to previous research by integrating values work with the concept of institutional leadership. Secondly, it offers an agentic process perspective, analysing how leaders contribute to institutionalising the mission, values and character through ongoing and recurring organisational processes.

Relating Values Work and Institutional Leadership

Selznick was interested in how organisations evolved into institutions by developing a distinct character and labelled the work of leaders to infuse them with values as institutional leadership (Selznick, 1957). Claiming that ideational, change and agentic aspects were lacking in research, authors voiced the need for understanding institutional change as related to intentional, resourceful and strategic efforts. Coined as institutional work (Lawrence & Suddaby, 2006), it pointed at the possibility to establish 'a broader vision of agency in relationship to institutions' (Suddaby, 2010, p. 16). This emphasis sparked interest in different kinds of such work (Phillips & Lawrence, 2012; Suddaby & Foster, 2014). Of particular interest for this chapter is values work (Aadland et al., 2006;

Askeland, 2014; Gehman, Trevino, & Garud, 2013; Vaccaro & Palazzo, 2015).[1] Leaders perform values work as they become involved in the reflexive and skilful articulating and promoting of values and meaning in organisations, performing a particular set of actions to enhance ongoing knowledge and processes producing value-related practices in specific situations.

Of particular interest in this institutional context is the question of how 'good organisation' and 'good ends' are constructed. The case organisation represents an interesting example, operating within the frame of a Norwegian public welfare and health policy regime. The issue of fulfilling their faith-based mission within a secular society and adjusting to dynamic changes regarding legal, political and professional logics challenges them. Documented strategies are value overlap, integrating different logics into a new conception of values and character or seeing values as vessels of implicit religious meaning (Askeland et al., 2019; Eurich, 2012; Repstad, 2001).

Due to their responsibilities, vested with authority to initiate and shape direction, leaders function as key actors. The study of Gehman et al. demonstrated that values work could occur without executive managers being involved but encouraged studying top executives and their role in such work. Askeland and Beaton argue that aspects of this are evident across managerial levels even though they are clearest in the work and self-perception of top-level executives (Askeland, 2015; Beaton, 2017). Prior Scandinavian research demonstrates how values work is not solely linked to organisational governance or top-down implementation, underscoring collective and dialogical aspects of values work even while being initiated or facilitated by managers (Aadland, 2010; Aadland et al., 2006; Brytting & Trollestad, 2000; Petersen, 2003). Previous contributions to values work by leaders look at processes or phases in an organisation's life (Maierhofer, Rafferty, & Kabanoff, 2003), offering insight into processes and mechanisms that contribute to value formation and application in practice.

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[1]See also the chapter on values work by Espedal in this book for a more thorough discussion on values work.

A temporal and processual perspective enhances understanding on the inner life and dynamics of processes, where actors act intentionally and knowledgeably, simultaneously embedded in and responding to specific institutional contexts. Existing studies document that these processes manifest themselves through different groups voicing and acting on concerns or matters (Gehman et al., 2013; Vaccaro & Palazzo, 2015). Understanding values work as temporally embedded practice, Gehman and colleagues found the following four key processes: emerging concerns, knotting into action networks, performing practice and circulating discourses (Gehman et al., 2013, p. 102). Alternatively, Askeland identified the following four phases of values work: initiating, activating, articulating and maintaining across different levels of practice (Askeland, 2017, p. 176).

Research Setting

The case organisation is a diaconal institution, a kind of organisation established from the second half of the nineteenth century shaped by the moral and faith-based convictions of religious groups within a North-European Lutheran context (Angell, 2001), conceived as expressions of the health and social services of the Lutheran church. Over time, diaconal institutions developed into highly professional organisations. They operated in close collaboration with, and mostly funded by, public welfare agencies (Leis-Peters, 2014a, 2014b). Due to this institutional pluralism, they are subject to differing regimes by their constitution, embedded within multiple normative orders and possess multiple identities derived from segments of the plural environment (Kraatz & Block, 2017). Such embeddedness plays out differently related to national context (Göçmen, 2013), depending on institutional changes in religion and the role of the voluntary sector. The particular welfare and health policies and established relations to public agencies thus raise particular issues to consider.

Data were gathered at the Diaconal Foundation Røysum, an independent foundation, defining itself as a diaconal institution. The institution operates on contract with either state-owned health enterprises in the

rehabilitation of epileptics or local municipal agencies offering long-term care for epileptics as well as psychiatric patients.

Data from a combination of methods, such as participant observational field-notes, interview transcripts and policy documents form the material for research utilised in this chapter. In doing so, this chapter aligns with a need to get to the 'institutional stories', construction of meaning systems and frames for action rather than counting institutionalised forms (Suddaby, 2010, p. 16). Interviews gave important data on assessments of actions and their relation to mission, character and values. Policy documents of the organisation provided the same as they aim at articulating the missions and espoused values defining the organisation and represent data on the aspirations and efforts of the board and managers. Process data come from two cycles of organisational values work. The first process took place in 2006–2007, gathering archival data as reflected in policy documents and interviews and a previous report from the case study organisation (Sanna, 2008). A new cycle of values work, in which I had an opportunity to be a participating observer, started in the summer of 2016 and concluded in autumn of 2017, with my own summarising of Cycle II.[2]

Mission, Character and the Embodiment of Values

Analysing data, leaders' efforts to maintain and develop the good organisation evolve through three thematic frames: conceiving of the good home, participating in the enhancement of the common good and establishing a shared, embodied understanding of good practices.

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[2]This summary is not published but issued as a report to the Board of the Røysumtunet Foundation in November 2017.

Conceiving of the Good Home: Continuity and Development in Institutionalising the Mission

Temporality was important, as the leaders emphasised connecting to the founding era (Suddaby & Foster, 2014) in order to contextualise values work. The Norwegian Association of Deacons established Røysumtunet in 1965 as an institution of residence and care for epileptics, giving direction for institutional development according to the basic mission and values shaping its identity. Such conceptions require legitimation, and following a diaconal tradition, a central part of organisational identity formation was related to the concept of 'a good home' (Røysumtunet, 2015, p. 14) for groups without sufficient care. The organisational character captured an orientation towards 'good professional practice' in caring and enhancing 'a good life' for vulnerable groups.

Underpinning the values driving the establishment of Røysumtunet was the idea of doing *good* through the religiously inspired conception of Christian compassion (diaconia). In the original bylaws, mission and identity closely related to the Christian faith and tradition, building professionalism for long-term residence and care. The first CEO, Arne, framed the mission as being 'based on Christian values' and cited the original bylaws stating care to be 'a service in the Spirit of Christ'. Erik, the second and still acting CEO, expressed that institutional practice is an intentional enactment of 'Christian motivated compassion' and the institution to be 'part of the diaconal ministry of the Church'. While the early period marked a direct and articulated link to faith and morality, the last 20 years represents a broader orientation imbuing values-expressions with both faith-based and universal formulations.

As establishing institutions requires funding, the founders worked the ground for approval by forming networks and alliances with medical authorities and public agencies (Røysumtunet, 2015). The founders had a pragmatic view on this issue, collaborating with public agencies provided allies for performing the common good but also meant possibilities for funding (Tønnessen, 2005). Both CEOs underscored a non-conflictual relationship to public agencies.

Symbolic acts conveying religious meaning marked the opening of the institution as the prior farm buildings underwent a ritual of consecration in the presence of representatives of public agencies and local civic organisations. Throughout its history, residents had lived their lives and interacted closely with communal life in the local community. These historical lines established a basic understanding of mission, character and values maintained and adjusted through ongoing work and recurring cycles of values work. Publishing 30- and 50-year anniversary booklets, the CEOs edited one each, were deliberate efforts to narrate and connect the contemporary mission and character with the founding period of the organisation.

The first CEO stayed at his post for 30 years, contributing to basic shaping of mission and identity. The second CEO took on the task of renewing and broadening the organisation's scope and services, adding psychiatric care to the original care for epileptics. He articulated it thusly: 'Most of our residents consider Røysumtunet as their home, and this goes whether they stay for one or twenty years. Accordingly, we provide services aimed at living a full life; it's not just about care but concerns social life, leisure and even spiritual nurturing of differing faiths'.

The strategic plans of the period display a balancing of history and contemporary strategic opportunities, defining future mission, objectives and profile. Characteristic of the plans is a professional strategic assessment of the current reforms of health care in Norway as well as relations to external institutions and cooperative partners. Emphasis is put on the issue of economic growth as fundamental for a secure economy. They also display work of developing a profile and values during the period to be strategic. Both value process cycles of 2006–2007 and 2016–2017 contributed to developing the institution's profile. Values were articulated in a more general, humanistic way, underscoring confident, joyful and mature residents met by professionalised care. The basic mission was articulated implicitly but was still to 'conform to the institution's understanding of its diaconal mission, which is to help people in difficult situations, based on Christian compassion'.

Framing the mission of the organisation within the Christian faith tradition shows agency by the board and the CEO. Although operating under premises set by public welfare and health policies, and

being involved in promoting care and health as the common good, they labelled arguments for operating in this sector as diaconal. At the same time, in daily operations an equally important factor for the institution and the interviewees was to appear as a professionally strong institution with a particular focus on bringing confidence and quality of life to weak patient groups through holistic services (Sanna, 2008, p. 9). After the second cycle, the annual report for 2017 summarised the process by linking these dual rationalities:

> Our vision of generosity and competence signals that 'our diaconal profile is all about fraternal love and enhancing compassion' and at the same time 'it also expresses an expectation and commitment to performing competent professional health care'.

The CEO displayed the most evident commitment to the expressed values and initiated the process but worked closely with the executive group. The other managers were familiar with and identified with the values. First-line leaders stated commitment to basic values, emphasising their indirect effect on practice without articulating them as explicitly religious. Through critical decisions, both by the initiation and later expansion of organisational services, intentional efforts to define the mission and role of the organisation were evident—upholding the notion of the 'good home' through continuously narrating and adapting its framing within the given faith tradition.

Leaders' Contribution to Institutionalising 'the Common Good': Value Processes as Conveying of Character and the Role of the Organisation

The institution underwent a first cycle of values work in 2006–2007 and engaged in a new cycle in 2016–2017. Both cycles and processes, initiated by the Board and the CEO, partly confirmed and partly reformulated the existing mission and values statements (Askeland, 2014; Sanna, 2008). Choosing an inclusive design, all employees were invited and

expected to participate. The CEO chose a strategy, combining a representative project group preparing and summarising two plenary sessions while 16 smaller groups discussed and prepared plenary input.

At the outset of cycle two of values work in 2016, questions arose as to how open the process could be. The CEO acknowledged an open discussion to take place, underscoring this to be a deliberate choice by the board. He nevertheless signalled some limits regarding upholding the faith-based identity and mission in particular and not substituting all core values. The chair of the board together with the CEO gave introductions at plenary sessions, emphasising the importance of the services offered and their grounding in values and institutional history.

This paved the way for differing views, highlighting professional and humanistic aspects of organisational practice. This duality was evident in the values work process (2016–2017), both in the main project group and in working groups when presenting their discussions at two plenary sessions. Expressions of values had two main focal points—they were resident-oriented and important for performing daily professional practice. Also expressed, although less prominently, was the diaconal faith-base of the institution that showed legitimacy and accept among the staff.

Already evident from the first cycle in 2006–2007, much of the aspirations regarding the common good that the organisation enhanced were articulated and aligned with public health policy documents and humanistic values (Sanna, 2008). Still, leaders viewed the character and mission of the organisation in the context of religious tradition but more as inspiration and argument for the continuing presence of the institution (Askeland, 2014, p. 160). The second cycle (2016–2017) confirmed this profile but combined narrating the historical character with renewed and adjusted articulation of mission and values statements.

The new values chosen, reflected a profile that is distinct compared to reports on values of business enterprises but also public organisations (Falkenberg, 2006; Jørgensen, Vrangbæk, & Sørensen, 2009; Wæraas, 2018). While Falkenberg's study of values in Norwegian enterprises discovered several rationalities or logics, such as economic, moral, relational and professional values, economic values lacked among the values of Røysumtunet. Their values related to moral and professional practice and focused markedly on residents.

Røysumtunet is a health institution, operating as a service provider for public health agencies, characterised by public health and professional values and governed by health care legislation. The legal regulation of habilitation and rehabilitation stated general values and objectives concerning rights to and quality of services received. The choice of a new mission statement and values aligned closely with such publicly stated norms and standards. Røysumtunet chose values that 'correspond' with their own identity (Wæraas, 2010), while institutional health-sector values were incorporated, with assumed significance for legitimacy by possible components being given a situational- and institutional-specific composition. This way, choice was guided by those values which matter in the context at hand (Selznick, 1996, p. 271). Given that the organisation under study already had established identities, it seems probable that such organisational identity governed the choices of contextually available values and norms while keeping close to their own understanding of what common good to realise.

Although the mission and values statements did not use specific faith-based language, their formulations were framed by an understanding of diaconia as an expression of faith. Policy texts emanating from the values work cycles, including annual reports, strategic plans and internal procedures and codes of conduct, elaborated how chosen mission and values statements related to institutional character. This represents a continuous balancing of a dually constituted character by profiling distinction by translating common values while framing them in relation to institutional history.

Conceiving of and Performing 'Good Practice': Embodying Values in Organisational Structure and Practice

In accounts of the founding of Røysumtunet, faith was more explicitly said to embody practice. Nevertheless, professional care and the enhancement of a good life seemed to be the primary aspirations of daily work and a necessity for societal legitimacy, funding the expansion of services. In establishing Røysumtunet, the faith-oriented founders allied

with external stakeholders' expertise to secure legitimacy and sanctioning from public agencies. This mix of logics constituted and continued to characterise Røysumtunet.

The embodiment of values, firstly, had a symbolic and meaning-bearing dimension. The old farm storehouse was converted into and consecrated as a chapel in 1980. Monthly sermons together with a weekly devotion, held in a common living room, gave residents an opportunity to nurture their spiritual life. Symbolically, leaders and other members of staff throughout these 50 years voluntarily offered these devotions, combining their professional and managerial roles with those of being carriers of the faith tradition.

In preparation of the plenary sessions, all employees were invited to discuss working experiences related to existing values. These discussions let staff assess the experienced relevance and strengths of values, evaluating whether they were portraying or aligning with the diaconal heritage. The content of the group discussions was presented and discussed at the session, led by a department manager and later summarised by the project group. The project group drafted new issues to be prepared for the next session, inviting the groups to suggest new values and a new mission statement of the institution. Arguing and grounding accompanied the groups' suggestions for new values, followed by a plenary discussion. The project group summarised input for mission statements and values, discussing and negotiating suggested formulations. The CEO led the project group, keeping a low profile in the initial phase but became more actively involved in the concluding phase—not so much on the values statements but more active regarding mission statement and upholding the faith-based framing of interpreting the statements. Such agency involved heading a smaller group to edit and articulate a final suggestion of text.

When asked why the new cycle was initiated, the CEO stated: 'We did it very much to energize our attention to and enhance reflection on values. Therefore, we gave much leeway for the staff to influence the choice of values, whether we have respect or equality as core values does not change much. What is a change was the process in itself; we now have a more vigorous internal values discourse than ever before'.

Following each cycle of values work, as part of ongoing managerial leadership work, the formulation of organisational values led to articulating a platform of leadership philosophy and a parallel code of conduct for employees. This represents a structural effort of institutionalising practices. Developed in the executive group of leaders, it was an explication of how the values should inform practice. It covered areas such as human resource management, administration, financial management and professional practice. The primary focus of the leadership philosophy concerned an internal orientation for leading employees. Along these guiding principles, the implementation of values practices was combined with ongoing reflection on professional practice. Emphasised in plenary sessions and in conversations with staff and first-level managers, ongoing supervision and reflection-groups put the values and ethical dilemmas on the agenda on a continuous basis.

This mix is seen across differing sources of data. Though the institution has a self-imposed basis in the diaconal tradition informing defined values, leaders need to maintain a broad set of goals and values. Such a broader set of values relates to professional standards and quality, economic sustainability and the efficient use of resources in addition to relationships with official cooperative partners concerning reporting and legitimacy (Askeland, 2014, p. 168). In addition, Sanna (2008) claimed that the ongoing values work of the institution had a significant effect in daily life. Her study showed the integration of values in the daily work of the staff. Even though the staff did not express values as a conscious governing tool in daily life, they were reflected when it came to interaction with residents and cooperative partners (Sanna, 2008, p. 52).

Concluding Remarks

This chapter demonstrates how leaders contribute to the interpretation of organisational mission, shaping of character and embodiment of values in both structural guidelines and interpreting practice. Through values work, leaders address the issue of a 'good' organisation by attempting to bridge past and present mission, maintaining a sense of institutional

character and framing and legitimising their contribution for the residents and the community. This work is performed through activities ranging from faith-based practices, such as offering religious devotions and sermons, publications celebrating anniversaries narrating the history of the organisation and dialogical interaction through organisational value projects and maintaining and embedding values in procedures and daily practices. This holds true across levels, yet contribution differs with regard to level of the leaders. The CEO had a special role, authorised by the board, in articulating values and mission statements. The creation of a temporally consistent institutional narrative, through both ongoing efforts and recurring cycles of processes, is constituting a link between the creating- and disrupting/change-processes of institutional work.

Central to these efforts are choosing and articulating values, which function as 'stepping stones' that translate between the faith tradition and public welfare and professional values. The values, chosen among sector-based values, aimed at enhancing explication and arguments that integrate a faith-based profile and value-base with those sanctioned by public policy and professionalism. These values framed the more concrete professional and administrative practices that were the responsibility of mid-level and first-line leaders. These did not express much conflict between the different sets of values but rather integrated their professional leadership by loyalty to these more overarching values.

In addition, organising and facilitating a broad and inclusive process of values work contributed to engaged consciousness of the staff. The voicing of concerns at plenary sessions, regarding choice of core values, was acknowledged by the main project group, the executives and by the board. This found its way into the annual report of 2017, arguing for the change of core values from respect to equality: 'The value of equality substitutes respect, as the employee group considers this as a more applicable term, while the values of safety and coping are kept as they are prerequisite for a good life'.

I interpret these efforts as purposive acts aiming at infusing values and creating frames for action. While earlier studies report the prior values as ambiguous for groups among employees (Askeland, 2014; Sanna, 2008), the second cycle seemed to ground the new values as they align with concerns voiced throughout the groups and in the plenary work. Choosing

to facilitate a broad process, and yet setting some ramifications for change and directing the internal discussion, strengthened the internal acceptance of a diaconal heritage while focusing attention on including spiritual needs of the residents in general. This diversity was partly bridged by choosing and framing public values within the diaconal heritage but also by allowing involvement that fostered engagement, values consciousness and reflective capacity.

Through facilitating and managing processual work, their efforts relate to embedded agency. The established mission, character and values of the organisation is a frame for managerial work but also a matter of maintenance and even re-shaping by the interpretations and evolving practice of leaders interacting with internal and external actors and stakeholders. The re-shaping aspect has received little attention, although Selznick argued that true commitments needed continuous reassessment (Selznick, 1957/1984, p. 73). Selznick saw this as a combination of internal competencies and aspirations and external demands or pressures. This chapter suggests institutional pluralism spurs recurring efforts to bridge internal and external tensions, recreating a new articulation of mission, character and values.

I interpret this contribution as efforts of institutional leadership, as coined in previous work (Kraatz, 2009; Kraatz & Flores, 2015; Raffaelli & Glynn, 2015; Selznick, 1957; Tengblad, 2006), confirming the importance of values in communicating institutional character and understanding mission (Wæraas, 2010). Such purposive efforts are related to multiple internal and external value-sources and rationalities and work through conceiving of the 'good' organisation, partaking in the public policies for the common 'good' and performing 'good' professional practices through activities articulating shared social meaning and framing interpretation through symbolic practices.

Institutional leadership exerts values-infusion by creating narratives linking past, present and future, translating external values-expectations by aligning and framing them with existing organisational identity, and securing their embodiment by facilitating processes of explorative values

discourse. Utilising the ambiguity of values enhances shared yet individual interpretation of values, bridging the interests of differing stakeholder groups.

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