THE

ESSENTIALS

OF

ORGANIZATION

A Personal View

EDIE FROST JOHNSON and JOHN J. O'NEILL

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OF ORGANIZATION

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Acknowledgments

Like its companion publication, The Essentials of Planning, this project was undertaken in response to an increasing number of suggestions and other indications that a publication of this nature might have considerable informational and operational value for individuals involved in organizational planning for Church institutions at both the national and diocesan levels. The content, however, has been designed for use in connection with a much wider range of organizations.

The National Conference of Catholic Bishops (NCCB) is a canonical entity operating in accordance with the Conciliar Decree, *Christus Dominus*. Its purpose is to foster the Church's mission to mankind by providing the Bishops of this country with an opportunity to exchange views and insights of prudence and experience and to exercise in a joint manner their pastoral office. (cfr. *Christus Dominus*, #38)

The United States Catholic Conference (USCC) is a civil entity of the American Catholic Bishops assisting them in their service to the Church in this country by uniting the People of God where voluntary, collective action on a broad diocesan level is needed. The USCC provides an organizational structure and the resources needed to insure coordination, cooperation, and assistance in the public, educational, and social concerns of the Church at the national, regional, state, interdiocesan and, as appropriate, diocesan levels.

Foreword

This study is being published in conjunction with the seventh anniversary of the appointment of the undersigned co-author as the first Secretary for Planning of the National Conference of Catholic Bishops and the United States Catholic Conference, an appointment which signalled the initiation of formalized across-the-board organizational and program planning within the two Conferences.

Those who are familiar with *The Essentials of Planning,* the earlier (1975) companion publication, will doubtless recognize marked similarities in approach, content, and style. The reasons for this are the favorable and often generous response to the earlier study, the essential interdependence of the subjects treated, and the identical authorship.

With regard to the latter point, the designation of Mrs. Edie Frost Johnson as co-author does not reflect an increased sharing of effort or responsibility. Rather, it reflects a reality which should have been recognized through a similar designation in connection with *The Essentials of Planning*. The words of acknowledgment in the preface to that volume, merited though they were, simply did not convey the total picture.

In addition, it seems appropriate to note, over Mrs. Johnson's objections, that a major part of her contribution to the present study was made during a period of considerable physical discomfort, during much of which she was hospitalized.

April 15, 1977   John J. O'Neill

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Preface

One of the more interesting — and continuing — responses to *The Essentials of Planning,* the companion study published in 1975, is the large number of inquiries concerning the nature and form of the organizational structures within which planning is to be undertaken and through which the resulting program agendas are to be implemented.

The intent of the present study is to respond to these inquiries, and to others which have arisen during the past seven years, not by providing yet another complex, technical, and fully annotated textbook, but by presenting certain key concepts and illustrating them with examples which should be relatively familiar to most of those using the publication.

In order that these examples may be more precisely understood, it may be well to note the distinction between the two Conferences to which reference is made in the study. The National Conference of Catholic Bishops and the United States Catholic Conference are both organizations of the Bishops of the United States. Each Conference, however, has its own particular mission and area of competence. Setting aside complexities which have no relevance in the present context, it may be said that the primary concern of NCCB, the parent body, is with doctrinal, canonical, and pastoral matters, while the USCC is the agency through which the Bishops address in a collegial manner the public, educational, and social concerns of the Church.

This publication, like its predecessor, makes no claim to breaking new ground, although it is hoped that readers may find a fresh approach to some of the matters treated. Our reliance is upon the experience of these seven years within the two Conferences as well as upon our combined recollections of more than thirty years of organizational experience in the private sector and in government, rather than upon any extensive new research.

This limitation, which arises out of a realistic assessment of the availability of time and other resources, may ultimately prove advantageous since what appears to be called for in the present context is a concise and straightforward working document rather than a complex and extended technical treatise.

There may be a further advantage if the writers are correct in their view that there is, in organizational as well as program planning, a persistent and growing tendency to complicate or obscure what is essentially a relatively simple and completely unmysterious subject.

If the present study and its companion volume have succeeded in avoiding this pitfall without lapsing into the equally serious but far less common error of over-simplification, they should be well on their way to achieving the purpose for which they were undertaken.

Although this publication is a Conference project, it should not be viewed as an official NCCB/USCC document. Full responsibility for the content as well as for any errors or other deficiencies rests solely with the authors: thus the designation as a personal view.

At the same time, grateful acknowledgment is made of the contributions of many individual Bishops and many staff associates. The number of those involved precludes a complete listing.

It does seem appropriate however to include a special word of gratitude to those Bishops who have served as members of the Committee on Research, Plans and Programs during these seven years: Cardinals Carberry, Dearden, and Krol; Archbishops Bernardin, Donnellan, Maguire, and the late Leo Byrne; and Bishop Rausch. Each of these individuals has contributed in an important way not only to whatever we may have been able to accomplish in these years, but also, and most deeply, to the joy which has been so closely identified in our own minds and hearts with the achievement.

It also seems appropriate to express our appreciation to those involved in various dimensions of planning at the diocesan level. Their inquiries and their interest have provided no small part of the incentive for undertaking this present work, and have done much to determine the nature of its content.

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Edie Frost Johnson
John J. O'Neill

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April 15, 1977

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THE ESSENTIALS OF ORGANIZATION

A Personal View

Introduction

The choice of title for this study was dictated in large measure by the title of its predecessor volume, *The Essentials of Planning*.

Otherwise the designation, somewhat more appropriately, would have been "The Essentials of Organizational Planning"—just as in retrospect "The Essentials of Program Planning" would have been more appropriate for the earlier publication.

This point has significance beyond the merely semantic: the first "essential of organization" is planning. There are, or should be, no static organizations. The very concept of organization is dynamic. Even the momentary still points should be part of an unceasing movement, like the rest in music. Otherwise they are likely to be the starting points for retrogression, the beginnings of decline.

Thus the concern here, as in the initial study, is "with temples building, and not with temples built."

Aside from this key dynamic of planning, two other primary "essentials of organization" will be encountered in varying forms and contexts throughout the remaining chapters.

The first of these is THE PRIMACY OF FUNCTION OVER STRUCTURE. The second is THE PRIMACY OF THE TOTAL ORGANIZATION OVER ITS INDIVIDUAL ELEMENTS.

Since these twin concepts are basic to the entire study, a few words about each may be useful here.

The primacy of function: Organizational thinking must begin with function. STRUCTURE FOLLOWS FUNCTION. Function is the reason an organization exists. Structure is a vehicle for facilitating function. Structure without or unrelated to function may be likened to a character in search of an author, an accident waiting to happen.

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The primacy of the total organization: IT IS THE TOTAL OR-
GANIZATION WHICH RELATES, ACTS, PLANS, AND IMPLEMENTS
PROGRAMS. The individual structural components of staff mem-
bers are the instrumentalities through which the relationships,
activities, or programs of the total organization are carried out.
THE EFFECTIVENESS OF AN ORGANIZATION IS ULTIMATELY
DEPENDENT UPON THE ABILITY OF ITS INDIVIDUAL ELEMENTS
TO WORK TOGETHER IN HARMONY AS PARTS OF A TOTAL
SYSTEM OR ENTITY. The achievement of this harmony is a
major goal of organizational planning.

This primacy of the total organization, this reference to indi-
viduals as instrumentalities, must not be interpreted as reducing
individual staff members to anonymous units. It will not be so
interpreted if it is read as it is intended to be, in the context of
the listing and definition in a later section of the essential con-
ditions for effective organizational planning, particularly in the
discussions of the twin factors of community and compassion.

Finally, something more needs to be said with regard to the
inseparability of the organizational and program planning dis-
ciplines. They are in effect two sides of the same coin.

An excellent illustration of this inseparability in an area which
will be familiar to many readers is to be found in the evolution
of the NCCB/USCC Committee on Research, Plans and Pro-
grams from an executive body primarily concerned with program
planning to a body equally concerned with organizational plan-
ning: ongoing evaluation of the structures and systems through
which approved programs are implemented.

An immediate consequence of this inseparability is that the
authors have felt free to quote directly or to paraphrase material
from *The Essentials of Planning* in this present volume.

The authors have also considered it appropriate to augment
the program planning dimension of the earlier study through in-
clusion in Appendix Two of material on the nature and extent
of assistance to diocesan-level planning which is available from
the NCCB/USCC Planning Office. This appendix should be read
as applying to both organizational and program planning.

Despite this intentional interrelationship between the two
studies, each is designed to stand on its own, although it is
hoped that the two will frequently be used together.

Focus

Because the terms "planning" and "organizational planning" can be used to refer to a wide variety of activities and disciplines, it is important to note that the particular focus of the present work is on planning as it relates to the structures and systems through which the approved program agenda of an organization is carried out.

In this connection it is interesting to note that in a recent study relative to pastoral planning at the diocesan level the above definition of focus was among the more common forms of activity designated as pastoral planning.

Essential Conditions

The conditions which are essential to organizational planning can be defined in many ways. The listing presented here reflects the view that the personal element is if possible even more critical in organizational planning as defined above than in program planning as it is most commonly defined. From this standpoint the conditions essential at all levels of the organization include:

- Courage
- Commitment
- Competence
- Community
- Compassion

Courage is placed first not because it is more essential than the other conditions but because experience indicates that the need for it often comes as a surprise after organizational or program planning processes have been initiated. The introduction of formal planning, particularly in a long-established and relatively static organization, can be expected to give rise to considerable difficulty and even resistance. Many efforts initiated in response to the current enthusiasm for planning have run aground on this rock. Where the courage to follow through is lacking, planning all too easily becomes an exercise in futility. Here, as in so many key dimensions of life, there is a vital need for the courage to persevere: "in due time we shall reap, if we faint not."

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Commitment may be thought to encompass courage, but the separation of the two reflects the view that it is possible to be committed to planning as a theoretical discipline while lacking the courage to face its consequences at the operational level. Commitment is particularly important at the highest levels. While this is doubtless true with regard to all dimensions of management, it is normally a more critical issue in the case of formal planning. The reason for this is that planning continues to be viewed in many quarters as essentially optional. This position is particularly persistent in organizations which have functioned over a long period without recourse to formal planning. For this reason there is a significant element of risk that without the clear and direct support of executive management the planning function will continue to be regarded as optional by many potential participants, even after a planning office has been activated. The truth of this observation is attested to by the fact that in all too many instances the planning office exists as little more than a status symbol or a token commitment to the planning discipline.

Competence is required not only among those directly responsible for the planning function but also among all who will ultimately be called upon to participate in the related formal and informal processes. Indeed, it is recognition of this requirement for competence at all levels which accounts for so much of the "organizational nervousness" commonly accompanying introduction of the planning function. What is most often involved is the realization that an all but inevitable side-effect of planning is the gradual elimination of all of the "hiding places" within the organization.

Community encompasses the more familiar and more frequently listed factors of communication and cooperation but far transcends them. In a work emanating from and primarily intended for those involved in planning for Church organizations, an extended commentary on this subject should not be necessary and might even be considered inappropriate. Let it then suffice to say that it is of critical importance never to lose sight of the personal dimension of an organization, its essentially human nature: not a cold bureaucratic structure, but a body of living members, an edifice of living stones.

Compassion might well be considered as included within the factor of community since there is unlikely to be any real community without it. It is listed separately as a reminder that it simply belongs to planning, as it does to any dimension of life in which individuals are placed in situations involving potential misunderstanding or conflict. It is listed separately, too, as a reminder that it can never be taken for granted.

The Primacy of Function over Structure

It has already been said but cannot be repeated too often that organizational thinking must begin with function. STRUCTURE FOLLOWS FUNCTION. Function is the reason an organization exists. Structure is a vehicle for facilitating function.

The United States Catholic Conference, for example, is a corporate entity through which the Bishops of the United States have elected to exercise a number of their responsibilities, to implement a number of specific programs: i.e., to perform certain specifically defined functions.

It is these functions which are essential and which for this reason are described generically in the corporate charter; the specific internal structure of this corporate entity is one of the accidentals—no matter how careful and effective its design.

This distinction may best be understood in terms of the legal requirements involved. A radical change in the purpose (function) of the organization would necessitate a revision of its corporate charter, perhaps even re-incorporation for the new purpose; a radical structural change would have no similar implications.

This is not to say that structure is unimportant in and of itself. Nevertheless, it remains true that without function structure has no real and lasting meaning. Function relates to the reason for being, structure to mode or manner. Function relates to substance, structure to style.

The primacy of function can also be viewed from the perspectives of operational management. In this context function is normally viewed as a constant, structure as a variable. Management is normally told what is to be achieved, normally expected to determine how it is to be achieved.

Thus in the final analysis structure can be viewed as an operational option existing within a functional mandate.

The Primacy of the Total Organization

As stated in the introductory section, IT IS THE TOTAL OR-
GANIZATION WHICH RELATES, ACTS, PLANS, AND IMPLEMENTS
PROGRAMS. The individual components or staff members are
the instrumentalities through which the relationships, activities,
or programs of the total organization are carried out. THE
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SYSTEM OR ENTITY.

This concept is all too easily, and not surprisingly, lost sight
of in the midst of natural day-to-day preoccupation with the more
immediate concerns of individual organizational elements or indi-
vidual staff members.

For this reason it is advisable to maintain the broader focus
through conscious and directed effort on an ongoing basis rather
than through chance or occasional reminders.

The key to this is to be found in continuing emphasis on the
spirit of community through organization-wide communications,
reports, and other activities, formal and informal, internal and
external. The staff meeting rightly used at all levels can make
an important contribution here.

Within appropriate limits a friendly spirit of competition is not
only permissible but often desirable. But the limits of such com-
petition can be defined as exceeded when the result is counter-
productive in terms of the effectiveness of the total organization.

The objective is to achieve a creative, coherent, and cohesive
approach to the mission of the total organization, through the
greatest possible degree of unity consistent with the fundamental
requirements of the individual disciplines and elements involved.

This accounts for the importance assigned in *The Essentials
of Planning* to the initial development and constant refinement
of the organization-wide statements of essential mission and ma-
jor objectives.

It is these statements which in the final analysis provide the
necessary framework or context without which the harmonious
functioning of the total system or entity is not likely to be
achieved.

The Human Dimension

In the earlier discussion of the essential conditions for organizational planning and for ongoing organizational effectiveness, considerable emphasis was placed upon the critical nature of the human dimension.

So fundamental and multi-faceted is this factor, and so frequently does it tend to be overlooked in the present day, that it could be treated only sketchily even if this entire volume were given over exclusively to it.

Fortunately an extended treatment is already available through the existence of what the present authors consider a truly definitive treatment in *The Human Nature of Organizations,* by J. Douglas Brown, published in 1973 by AMACOM, a Division of American Management Associations (130 West 50th Street, New York, N.Y. 10020).

While it is clearly impossible to do justice to this major achievement in a short summary or series of quotations, the following excerpts have been chosen in an effort to convey those dimensions of the general spirit and overall thrust of the book which are of most immediate application in the present context:

> • An unfortunate by-product of the development of the large-scale organizations needed to implement the advances in science and technology is *the increasing tendency to extend the impersonal approach of science and technology to organizations which, regardless of size, remain essentially human institutions.* (Emphasis added)

> • Science and technology have not altered the persistent and controlling attribute of human organizations —namely, whatever the organization's size or form, it continues to be subject to the complex and unpredictable initiatives and responses of the individual human beings who make it up. This is the human nature of organizations.

> • We wrongly assume that a member of a human organization, like a known molecule in chemistry, will, with high probability, react in a predictable way to a known external stimulus. . . . But, unlike a molecule in chemistry, the human member of an organization is neither "known" nor insensible.

- But as one gets older, the shortcomings of quantitative methods become more evident. The personally observed history of human organizations in action, buttressed by the numberless episodes of recorded history, give one faith that judgment and insight gained from qualitative evidence can be more useful than quantitative exercises in contributing to our knowledge of how human organizations work. . . . The intuitive process of the human mind has vastly greater range and flexibility than any computer.

The authors of this present study have little or nothing to add except to repeat the invitation to those who would pursue the subject further to obtain the work from which these extracts are taken.

It is to be noted, however, that the influence of this work on the present study doubtless extends well beyond this present section, and it is a pleasure to acknowledge such a debt (which, in the case of the senior member of the writing team, extends even to the meaning-filled phrase, "but as one gets older").

Preoccupation with Structure

The stress placed thus far on the primacy of function over structure is a reflection of the intrinsic importance of this particular concept.

An additional practical reason for the same emphasis is to be found in a persistent and increasing preoccupation with structure in and of itself. This preoccupation, never truly uncommon, appears to have become much more widespread in recent times —to the extent that it can almost always be observed in instances in which a particular structure has existed for an extended period of time.

The process by which this preoccupation develops is most interesting. In the beginning structure is used as a symbol or shorthand figure signifying function, but through repeated use the distinction between structural symbol and functional reality is gradually lost.

At the same time and by a similar gradual process, commitment to function is unconsciously transformed into commitment to structure.

The ramifications of this twofold development are far-reaching, and the long-run impact is almost certain to be negative in terms of carrying out the essential mission and effective utilization of available resources.

What normally becomes operative is the natural tendency of existing structures to take on a life of their own. In turn program planning becomes oriented to preserving structural life rather than to achieving overall organizational objectives. Program becomes a support for rather than a determinant of structure.

This reversal ensues because of the concomitant tendency to view forward program questions in terms of existing structures (individual units) rather than in terms of the organization as a whole. For example, instead of asking what should be done in a given functional area, the question is made to relate to what should be done by a given structural unit. Under the first form the question relates to whether there will be any activity at all; the second simply assumes that there will be since it assumes the ongoing life of the structural unit.

> The conflict grows as the overall organization ages. At first there is a strong likelihood that, even though the two questions differ, there will be a single common answer. This is true because the existing program needs were "present at the creation."

> As time goes on, however, some of the initial program needs will doubtless be met. This is the danger point, since structures initially created to meet recognized program needs tend to perpetuate involvement in these program areas after the recognized needs have been met.

The answer to this difficulty is usually stated in terms of a program planning system which at some stage of the review process provides for evaluating each program as if its implementing structure did not exist.

This is only a partial answer, however, since the program proposals under consideration will have entered the review process through the existing structure and will more than likely have been conditioned by it. Indeed, implicit in most program proposals submitted by elements of an established organization is an assumption that the structure will continue in its present form.

To meet this situation it is not sufficient merely to assume the nonexistence of the implementing structure. It is necessary as well to go back to the original act of creation and to ask the original questions in a new time-frame: "Should we be involved in this functional area at all?" and, "If so, what form should our involvement take?" This will be recognized as the planning equivalent of zero-base budgeting.

Asked in this new context, the original questions may well provide answers which call for phasing out or curtailing certain structural units or individual programs, or for the initiation of new programs requiring new structures for their implementation.

In sum, it is essential that structure be viewed throughout the life of an organization as it was in the beginning: as a facilitator of function.

A related source of difficulty is the tendency to equate commitment to a given function with a particular structural entity, or box on a chart. The concern in such instances is expressed in terms of the need for identity. But identity in its fundamental sense relates to function rather than structure.

Where this fact is not recognized, commitment is viewed as depending directly upon structure: if there is a box on the organizational chart there is commitment; and as a corollary, the higher the box stands on the chart the greater the commitment.

This view persists even though it has been demonstrated over and over again in actual experience that the existence of an organizational structure without significant functional content is more likely to aggravate than to ameliorate the problem for which a solution is being sought.

Finally, it is sometimes argued that the best approach is a free-flowing movement back and forth between considerations of function and those of structure. Attractive as this may sound, it generally proves a high-risk, low-gain substitute for direct and prior focus on function. Where the two are intermingled the tendency is almost irresistible to discuss function in relation to a particular existing or proposed structure. And it is a commonplace of management experience that the inhabitants or advocates of any particular structure can always define a task for it.

The Costs of Structure

Structure is expensive in and of itself. It is costly in terms of operating expenses and in terms of management control.

Each new structural entity, each new box on the formal organizational chart, involves additional expense, and the amount of such expense normally exceeds initial estimates.

The minimum staffing complement for a separate structural unit is two employees; where a beginning is made with one, an eventual request for separate secretarial, clerical, or administrative assistance is all but inevitable. The same is true of separate space, separate furnishings and equipment, and all the rest.

This concept applies of course not only to the addition of new structural units, but to the perpetuation of existing ones.

It is important to recognize that the simplification of an existing structure may not be as radical a departure as it appears to be on first consideration. This is true because, again, function is the essential element.

It may be useful at this point to cite, from the joint experience of the authors, an example of significant expenditure reduction achieved almost entirely through the simplification of an elaborate organizational structure.

The reduction in expenditure was required in view of the need for non-deficit fixed-income operation in a period of rapidly rising costs.

The goal of the studies carried out by the present authors was to develop an affordable structural alternative which would preserve all essential elements of function.

The result, stated in an over-simplified manner for purposes of this illustration, was an expenditure reduction approximating one million dollars (from five to four million dollars in total) through the elimination of one entire level of management at the middle level, and consolidation of previously separate structural units at this level on the basis of commonalities of program content (function) or process.

The net effect, according to those served by the organization, was that there was no appreciable impact in terms of function, and an appreciable improvement in the delivery systems for the services involved.

The permanence of this achievement is attested to by the fact that the results noted are based on close to four years of operation with the simplified structure. The foundation upon which the achievement was based is attested to by the designation of the program in the formal archives of the organization involved as the "Structural Simplification Program."

It is also interesting to note in connection with this illustration that the maintenance of structures which were more elaborate than function required had, in some instances, resulted in distancing or isolating functions which should have been closely integrated. Further, since the focus at the time had not been upon function, such situations had been "remedied" through the establishment of unnecessary and often expensive linkages rather than through direct functional integration.

Finally, mention should be made of another significant cost factor directly related to structure: the concept of span of control (the number of positions reporting to the same position at the next higher organizational level). Clearly the establishment or perpetuation of separate structural units has a much greater impact in this area than the integration of functions within existing activities.

Establishment of New Offices or Other Structural Units

The primacy of function must be seen not only in terms of the totality of an organization, but also in relation to its individual elements.

This more localized dimension of the concept is of particular importance in periods of significant change, such as the present. One of the principal techniques with which advocates of a particular cause are likely to confront an existing organization is the recommendation, or demand, for the establishment of a new office or other structural unit to deal with their particular area of concern.

It is essential for an organization faced with such proposals to make provision for dealing with them in an orderly, consistent, and effective manner.

One particularly useful approach is the development of formal guidelines for evaluating such proposals, with application of the guidelines assigned to an appropriate executive authority of the organization.

The application of such guidelines is designed to ensure that purely structural proposals are recast in functional terms, and then to ensure that they are thoroughly analyzed in the light of established organizational statutes, bylaws, and policies and approved planning, budgetary, and administrative procedures.

The first step in considering any proposal for a new office should be an examination of its feasibility, or basic legitimacy, in relation to the organization's statutes, bylaws, or governing policies.

The reason for this is that certain activities are likely to be directly excluded by the statutes and bylaws, and a number of these exclusions may be made even more explicit in the formal statement of essential mission or major objectives.

Aside from its clear necessity from a legal point of view, placing this step first has the additional advantage of eliminating unnecessary further analysis of proposals which do not survive this basic screening.

With regard to those proposals which meet the basic test, there is still a considerable amount of analytical and evaluative work which should be undertaken prior to submission of the proposal for formal action. This analysis and evaluation is what is usually encompassed in a feasibility study.

Essentially what should be involved is application of the same planning, budgetary, and administrative processes as are applied in the annual review of existing organizational components.

For the purposes of this study, these planning, budgetary, and administrative factors are discussed in terms of five key areas: function, structure, finance, physical facilities, and visibility.

From the standpoint of function, the creation of a new office need not give rise to difficulties (e.g., overlap, duplication, and resultant conflict situations). Such problems are likely to arise, however, when the new activity is established without prior study of its intended functions in relation to those of existing offices.

In this connection, it should be clear from what has been said up to now that the heart of the matter is that organizational thinking should begin with function: each proposal should deal initially with the substance of the new function rather than with the question of the specific structure which may ultimately be involved in performing it.

Indeed, a proposal which begins with the premise that a new organizational unit should be created because a new function needs to be performed (or an existing one given added emphasis) is "out of order" from the standpoint of organizational theory and practice. To begin at that point is to begin with the assumption that function grows out of structure, a complete reversal of the generally accepted norm.

With regard to structure, a significant potential difficulty relates to the question of span of control. Without entering into futile discussions as to the precise number of activities which can be effectively supervised by one individual, it is clear that the creation of new and separate activities has a much greater impact in this connection than the integration of new functions into existing activities.

In financial terms, one very practical question to be faced in connection with recommendations for the establishment of new offices is that of the availability of the necessary resources.

While decisions as to involvement in a given functional area should not be based upon financial considerations alone, it is clear that this dimension cannot be overlooked in evaluating any proposal for a new activity.

It is even possible that in rare instances financial considerations may in and of themselves make it necessary to opt for a new structural entity rather than integration of new functions into an existing unit. However, this approach should be avoided unless it has been clearly demonstrated that the need for financial separateness cannot be met through accounting rather than structural measures.

The factor of physical facilities must also be taken into consideration because of its clear relationship to both expenditures levels and effective coordination.

This matter is significant even in instances where the building involved is wholly owned, since a continuing increase in the number of offices will eventually necessitate the rental or purchase of additional space.

It is important to bear in mind in this regard that the implications of additional locations for integral elements of a single organization are likely to extend well beyond the financial impact and affect such areas as effective supervision and coordination, and the provision of essential operating services.

Finally, with regard to the visibility factor, there may be instances in which the establishment of a separate office is deemed necessary in order to provide sufficient initial visibility for a particular function or area of concern, even where analysis in the light of the functional, structural, financial, and physical facilities factors results in a negative recommendation. The arguments against such an approach are implicit in the foregoing analysis of the remaining key areas.

The weight of organizational experience indicates that any decision to give an organizational function separate structural status based on the visibility factor alone should incorporate a specific time limit and make provision for annual review if the initial time limit is set at more than one year.

The next step after completion of the analysis just described is the preparation of a formal proposal. Among the most important items to be included in such a proposal are:

- **Planning:** A statement of the essential mission of the new unit, a listing of the basic objectives it hopes to achieve, and descriptions of programs (actual or model) through which these objectives are to be achieved.

- **Budgetary:** A related budgetary analysis showing anticipated sources and uses of funds.

- **Administrative:** An evaluation of the potential impact upon the existing organization in terms of such factors as administrative structures and physical facilities.

The final step in the process is the submission of the formal proposal to the appropriate executive authority of the organization.

The key to success in the process is to take this final step only after the analysis described above has been completed.

An example of a specific set of formal guidelines currently employed in making this kind of in-depth evaluation of proposals for the establishment of new offices is to be found in Appendix One.

Impact of Planning on Pre-Existing Organizations

In the particular context of this study, dealing with Church and Church-related organizations at the national, regional, and

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local levels, the most commonly encountered circumstances are those which involve the introduction of organizational planning into pre-existing organizations which have a long and, from the standpoint of structure, relatively static history.

Under these circumstances, the weight of experience indicates that the initiation of formal planning is likely to lead to a relatively radical restructuring of the total organization within a relatively short period of time.

This is not surprising since the fact that a given structure has not been kept abreast or ahead of function is likely to be one of the first "discoveries" resulting from the introduction of planning on a formal basis.

Failure to recognize this reality, or subsequent unwillingness to deal with it, are among the most frequent root causes of difficulties which, wrongly attributed to planning itself, have led to disappointment with the results achieved, or even to outright abandonment of the planning effort.

A good planning system imposed upon a rigidly fixed and no longer relevant structure, with a firm intention to maintain that structure at all costs, is an open invitation to disaster—not just for the planning system but for the organization as a whole.

As stated at the outset, the introduction of organizational planning carries with it, as an essential pre-condition, an openness to change and the courage to implement it: "in due time we shall reap, if we faint not."

Interdependence of Various Dimensions of Planning

Reference has been made throughout this study to the essential interdependence of all of the various dimensions of the total planning effort within an organization.

So multi-faceted and interlocking is this interrelationship that it might indeed be more appropriately referred to as "interpenetration" if this word were in more common use.

This interdependence encompasses, for example, organizational planning as defined in this study; pre-organization planning as carried out through feasibility studies and other similar techniques; program planning; staff (personnel) planning; facility

planning, including provision for furnishings, equipment, and amenities; overall financial planning, including its specific budgetary dimension; and finally in the present context the wide and varied range of activities which are currently referred to as pastoral planning.

A brief digression appears in order at this point to take note of the continuing and growing need for a more uniform usage of the term pastoral planning within the various Church organizations and instrumentalities. The term continues to be used in a wide and at times confusing variety of ways: to refer to the entire spectrum of planning activities illustrated above, or exclusively to any one of them (frequently to the exclusion of all others). Its meaning, that is, ranges from the very general to the very specific. This situation was illustrated most recently through an analysis of the content of "pastoral planning materials" submitted by thirty-five individual dioceses. This analysis revealed an almost complete absence of uniformity of usage or approach, together with a more frequent than anticipated employment of the term to refer to a very narrowly defined and specific activity (e.g., the assignment of individual members of the clergy; the determination of parish boundaries). Yet despite this wide diversity the term continues to be used as if it had only a single generally accepted meaning.

In any event, returning to the broader discussion, the essential interrelationship among the various dimensions of planning appears to be largely self-evident.

Program planning, for example, is so closely intertwined with the budgetary dimension of financial planning that the two are often carried out within a single structural unit, without damage to the concept that structure is determined by function.

A second example, already cited in another context, is to be found in the fact that the introduction of formal program planning frequently leads within a relatively short period of time to a general restructuring of the total organization involved, a restructuring based on the employment of organizational planning techniques.

This factor of interdependence was among the principal reasons for choosing, in *The Essentials of Planning,* to describe planning as a general ongoing organizational method or discipline, an organizational state of mind.

It also explains why the introduction of one particular dimension of the total planning discipline results almost inevitably in planning on an across-the-board basis within a relatively short period of time.

An this in turn is almost certain—where the essential conditions exist—to lead to the desired goal of an integrated approach to the achievement of the essential mission and basic objectives which are the reason for being of any organization worthy of the name.

Planning and Effective Control

Reference was made in the preceding section to the integrating role of across-the-board planning within a given organization.

One important and frequently underestimated aspect of this integrating role is its contribution to effective management control, both programmatic and structural.

Established management theory and accumulated operational experience strongly support the conclusions that:

> • The most effective instrumentality available to management for ensuring the necessary control of an organization's program agenda is a fully functioning program planning system.

> • The most effective instrumentality available to management for ensuring the necessary control over an organization's structure is a fully functioning organizational planning system, including a formal set of guidelines governing the establishment of new structural units.

The nature and content of such guidelines are discussed in a separate section of this study, and a specific example is provided in Appendix One.

The Spirit of Performance

The title of this section is the title of a key chapter in what the authors view as one of the most valuable resources available to those for whom the present study is primarily intended: "individuals involved in planning for Church institutions at both the national and diocesan levels."

That resource is *Management: Tasks, Responsibilities, Practices,* by Peter F. Drucker, published by Harper & Row,

Publishers, Inc. (10 East 53rd Street, New York, New York 10022).

Its value in the present context stems not only from its wide range and general excellence but also because its coverage extends to private not-for-profit organizations.

Because it is impossible to summarize even the general content of this large volume (839 pages) in a short section of a short study such as this, the most useful approach—and introduction—to the work and to its relevance in the present context seems to the authors to be to quote directly the opening paragraphs of Chapter 36: The Spirit of Performance.

- The purpose of an organization is to enable common men to do uncommon things.

- No organization can depend on genius: the supply is always scarce and unreliable. It is the test of an organization to make ordinary human beings perform better than they seem capable of, to bring out whatever strength there is in its members, and to use each man's strength to help all the other members perform. It is the task of the organization at the same time to neutralize the individual weaknesses of its members. The test of an organization is the spirit of performance.

- The spirit of performance requires that there be full scope for individual excellence. The focus must be on the strengths of a man—on what he can do rather than on what he cannot do.

"Morale" in an organization does not mean that "people get along together"; the test is performance, not conformance. Human relations that are not grounded in the satisfaction of good performance in work are actually poor human relations and result in a mean spirit. And there is no greater indictment of an organization than that the strength and ability of the outstanding man become a threat to the group and his performance a source of difficulty, frustration, and discouragement for others.

Spirit of performance in a human organization means that its energy output is larger than the sum of the efforts put in. It means the creation of energy. This cannot be accomplished by mechanical means. A me-

chanical contrivance can, at its theoretical best, con-
serve energy, but it cannot create it. To get out
more than is being put in is possible only in the moral
sphere.

Morality does not mean preachment. Morality, to
have any meaning at all, must be a principle of action.
It must not be exhortation, sermon, or good intentions.
IT MUST BE PRACTICES.

Concluding Thoughts

The observations in this final section are not in any sense
mere afterthoughts, nor should they be seen as secondary to
those in the earlier parts of the study.

The intent here is to amplify and augment the material already
presented or to introduce completely new subjects, in separate
and relatively brief paragraphs, the order of which has no par-
ticular significance.

Except for space limitations these observations would have
been treated more extensively, either by expanding existing sec-
tions or introducing new ones.

*   *   *

Tradition has an important role to play in shaping the future of
an organization, but should not, except in the most extraordinary
circumstances, be the sole determining factor. "We have always
done this" or "We have always done it this way" can very seldom
be translated directly as "We must always do this" or "We must
always do it this way." Nostalgia is unlikely to prove a satisfactory
substitute for informed judgment.

*   *   *

The statement of essential mission (or role or purpose) is a key
document in organizational planning. Properly developed, it
should set forth the fundamental purpose for which the organi-
zation was originally created or toward which its efforts are to
be directed in the light of changed circumstances. It defines,
that is, the organization's current reason for being. It is the basis,
too, for the definition of long-range goals and of the short-range
objectives derived from these. Finally, by a similar process of
derivation, it can be seen as the ultimate source of the program
agenda and of the organizational structure through which that
agenda is implemented.

*   *   *

It is not enough to measure the effectiveness of an organization by the effectiveness of its individual programs or structures, unless there has been a prior determination that the programs are right, and the structures relevant, in relation to the essential mission. The wrong program does not become right because it is effectively implemented. An irrelevant structure does not become relevant because it is effectively managed.

*   *   *

The organizational chart is a graphic expression of the decisions of the appropriate governing authorities of an organization with regard to hierarchical structures and related authority-responsibility relationships within that organization or individual segments thereof. What is set forth is the general norm, using conventional and generally understood symbols and techniques. The chart should be viewed as a context rather than as a constraint. The objective is to provide a comfortable rather than a confined situation.

*   *   *

Policy and procedures manuals, like organizational charts, express the mind of appropriate governing authorities, using conventional and generally understood language and illustrations. As with organizational charts, the intent is to provide a context for flexible operation rather than to establish rigid limits. One test of management effectiveness is its ability to make appropriate and timely exceptions to established norms.

*   *   *

The staff meeting is only one among a large number of vehicles for dialog and the flow of information and ideas within an organization. It can be particularly effective when there is a desire or need for mutual involvement, dialog, and the development of consensus at a given level. While it can also be used for short announcements and even simple and direct statements or reaffirmations of policy, the effort to use it for lengthy unilateral pronouncements is almost certain to undercut its effectiveness to a degree which will make it a counter-productive force. This is not to deny to management the prerogative of making such pronouncements. It is simply to suggest that their effect may be seriously diminished, and a valuable management tool may be seriously undercut, if the staff meeting is used as a platform for such pronouncements. The staff meeting, if it is to be involved in such matters at all, can be used most effectively as a forum

for discussion and dialog both before and after the pronouncement.

<center>*   *   *</center>

A major task of executive management, in all dimensions of planning and in most other aspects of management responsibility, is that of bridging the gap between what is conceptually desirable and what is practically feasible.

<center>*   *   *</center>

The long-run effectiveness of organizational planning is dependent upon the success of management in what must be a perpetual effort to rediscover and restore to a place of prominence the neglected arts of *un*thinking and *re*thinking. "We have already thought about that" is not sufficient. The thoughts and decisions of yesterday are merely the starting points for today. Those of today are the starting points of tomorrow. The authors can think of no more appropriate thought with which to end this study.

APPENDIX ONE

NCCB/USCC Committee on Research, Plans and Programs
Guidelines for Establishment of New Offices or Secretariats

NCCB/USCC Committee on Research, Plans and Programs
Guidelines for Establishment of New Offices or Secretariats

I. Background Information

On September 30, 1975, the Committee on Research, Plans and Programs "directed the Secretary for Planning to prepare for its review a proposed set of guidelines for the establishment of new NCCB/USCC offices or secretariats."

On April 2, 1976, the Committee approved the guidelines developed by the Secretary for Planning, and indicated that they are to be used in evaluating all future proposals for new offices or secretariats.

Sections II and III of this paper provide a summary of background material considered in developing the guidelines. The specific guidelines are set forth in Sections IV, V, and VI.

II. General Factors

As a first step, prior to any other in-depth review, *all proposals involving the establishment of new NCCB/USCC offices or secretariats are to be screened to determine their "legitimacy" in relation to established NCCB/USCC statutes, bylaws, and policies,* as these are set forth in the handbook of NCCB/USCC statutes and bylaws and in the USCC corporate charter.

This initial screening is essential because certain activities are directly precluded by the statutes and bylaws (or the USCC corporate charter), and a number of these exclusions are made even more explicit in the USCC statement of goals.

Examples of proscribed activities include: (a) those which "can be done, or done as well, at the local or regional level"; (b) those which would contravene the proviso that "the USCC is not a general funding agency"; and (c) those which are not permitted under applicable tax laws.

III. Specific Factors

With regard to proposals which do meet the basic "legitimacy" test, further analysis is to involve examination of the same planning, budgetary, and administrative factors as the annual review of existing organizational components:

- function
- structure
- finance
- physical facilities
- visibility

Function

Structure follows function: *organizational thinking should begin with function*. Each proposal for NCCB/USCC involvement in a new area is therefore to begin with a definition of the substance of the new function rather than with a recommendation concerning the specific structure which may ultimately be involved in performing it. A proposal which begins with the premise that a new organizational unit should be created is "out of order" from the standpoint of organizational theory and practice.

Structure

Structure is expensive in and of itself. An effective demonstration of this is to be found in the expenditure reduction achieved through the 1974 structural simplification program. Another significant structural consideration relates to the question of span of control. The creation of new and separate activities has a much greater impact in this area than the integration of new functions into existing activities.

Finance

In view of the mandate for non-deficit operation and the level of current budgets, each proposal for a new Conference-funded activity involves an implicit proposal to discontinue or otherwise modify some lower-priority activity or program. The financial impact of a separate office is normally greater than that involved in adding new functions to an existing office.

Physical Facilities

For reasons relating to both expenditure reduction and effective coordination, the Conference has opted for housing all Washington-based activities in one central location, at the 1312 Massachu-

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setts Avenue facility. Each proposal for a new activity has obvious implications in this regard, particularly when, as at present, occupancy is close to capacity.

Visibility

There may be instances in which the establishment of a separate NCCB/USCC office or secretariat is deemed necessary in order to provide sufficient *initial* visibility for a particular function or area of concern, even where analysis in the light of the functional, structural, financial, and physical facilities factors results in a negative recommendation. The weight of organizational experience indicates that any such decision based on the visibility factor alone should: (a) incorporate a specific time limit; and (b) make provisions for annual review if the initial time limit is set at more than one year.

IV. Recommended Guidelines: Introduction

These considerations are expressed in the form of specific guidelines in the remaining three sections. These guidelines are set forth in Section V as a listing of factors to be considered; in Section VI as a series of questions; and in Section VII as a series of procedural steps.

Under all options, a negative conclusion with regard to the second guideline would render further internal analysis unnecessary. Such a conclusion might, however, result in a search for the appropriate external organization to carry out the function.

V. Recommended Guidelines: Factors to be Considered

1. Specific nature of the function to be performed

2. Appropriateness of this function to the organization

3. Relationship of the new function to existing functions

4. Relationship of the new function to existing structures

5. Availability of necessary funding

6. Availability of the necessary physical resources and related services

7. Importance of the visibility factor.

VI. **Recommended Guidelines: Question Form**

1. What is the specific nature of the function to be performed by the proposed new office or secretariat?

2. Is this function appropriate to either NCCB or USCC in terms of the formal statutes, bylaws, or corporate charters involved?

3. What is the relation of the proposed new function to already existing functions? Is it by its very nature separate and distinct from them or is there a possibility for effective integration? Is separation from related existing functions more likely to create problems than to resolve them?

4. Is a separate structural "home" essential to the new function, or can it be effectively absorbed within an appropriate component of the existing structure, or through the modification of some existing component? (That is, would the proposed new function have been housed within an existing activity if it had pre-existed the structural simplification program?)

5. If the establishment of a separate structural entity (or the addition of staff to an existing entity) is required, are the necessary funds available? If not, are there lower priority activities which can be phased out to make such funds available?

6. Can the necessary physical facilities be provided within the limits imposed by financial or other operational considerations?

7. Can the necessary visibility be provided for the new function without the creation of a separate structural unit?

VII. **Recommended Guidelines: Procedural Form**

1. Definition of the specific nature of the function to be performed by the proposed new office or secretariat.

2. Determination of the appropriateness of this function to the organization in terms of the formal statutes, bylaws, or corporate charters involved.

3. Determination of the relationship of the new function to

existing functions and exploration of the feasibility of integration with them.

4. Determination of the relationship of the new function to existing structures and exploration of the feasibility of integration within them.

5. Determination of the availability of necessary funding if a separate structural entity is required (or if additional staffing is required within an existing entity).

6. Determination of the availability of the necessary physical resources and related services within limits imposed by financial or operational considerations.

7. Determination of the importance of the visibility factor in relation to separate structural identity where such identity is not otherwise indicated.

APPENDIX TWO

NCCB/USCC Planning Office
Provision of Service to Individual Dioceses
State of the Question: An Informal Summary

NCCB/USCC Planning Office

Provision of Service to Individual Dioceses

State of the Question: An Informal Summary

Introduction

During the past seven years individual dioceses, in increasing numbers, have requested the assistance of the NCCB/USCC Planning Office in connection with various aspects of planning at the diocesan level.

The nature and extent of the response to each request has necessarily been determined by relating the stated needs of the particular diocese to the capacity of this office to respond in a meaningful way within the desired time-frame.

As discussed in a following section, this capacity has in turn been determined by such factors as the deliberately limited size of the office, the necessarily limited funding available to it, and certain technical limitations within the planning discipline itself.

As a result, the extent of involvement has ranged from individual exchanges of correspondence to extended face-to-face, telephone, or mail dialog. In several instances, specific projects or systems have been evaluated for individual dioceses; and, in one instance, there has been extensive and ongoing "on-site" involvement.

Purpose

The purpose of this paper is to set forth in an informal manner a number of observations concerning the feasibility and possible extent of more formal involvement in planning, on a consultative basis, in planning at the diocesan level.

NCCB/USCC Diocesan Service Function: Definition

An important dimension of the total NCCB/USCC mandate is that involving the support function on behalf of diocesan and regional Church efforts in particular fields.

In many instances this support function involves a direct inter-face between an NCCB/USCC office, secretariat, or desk and a diocesan counterpart with direct responsibility in the same functional area.

In the case of the USCC, this diocesan support function is seen as having equally high priority with representation and coordination of Church efforts at the national level (cf., USCC Statement of Goals, in NCCB/USCC Statutes and Bylaws manual). By extension, and on the basis of operational experience, the same also appear to be true of the diocesan support function of NCCB activities.

According to the same USCC Statement of Goals, "The support envisaged should be in the form of informational and consultative services. USCC agencies can undoubtedly perform a service by helping to initiate diocesan programs; they should, however, set a withdrawal point—the point at which the local effort is well launched—and when that point is reached, they should withdraw from direct local-level engagement." Here again this definition can be viewed as generally applicable to NCCB activities as well.

In defining the scope of the diocesan support function, the USCC Statement of Goals (again generally applicable to the NCCB) provides as follows: "In the operation of the Conference, the principles of subsidiarity should be applied. Only those projects would be undertaken by the Conference which—in terms of the principle of subsidiarity—cannot be done, or done as well, at the local or regional level."

NCCB/USCC Diocesan Service Function: Importance and Limitations

Clearly, then, the provision of service to individual dioceses is among the primary reasons for the existence of the two national Conferences, and thus (by derivation) of their constituent elements. Such services, in fact, form a major part of the day-to-day activity of a majority of the program-implementing elements of the Conferences.

While the range of these services varies widely, an almost universal characteristic is that they involve a single uniform package designed to meet the needs of a significant number of individual dioceses.

The necessity for this approach is obvious: the human and financial resources of the Conferences are simply not sufficient to permit the provision of specialized services to individual dioceses except on a severely limited or pilot basis.

These two factors—limited human and financial resources and the concomitant need for prepackaged services—are of particular significance in the present instance, as will be shown in the section immediately following.

Specific Planning Office Application

Throughout the seven years of its existence, the Planning Office has functioned with a staff of two individuals.

Continuing operation of the office at this staffing level is the result of a conscious decision and policy on the part of the Planning Office staff, and reflects an intention to "force" as much as possible of the planning function out into the planning units themselves in order to ensure broadly based understanding and participation.

For this reason, and because the diversity of individual diocesan situations observed thus far appears to warrant the conclusion that a planning service on a prepackaged basis would have limited value, the indicated limitations under which the Conferences operate have an even more restrictive impact upon the potential of the Planning Office to provide diocesan-level services on more than a limited basis.

Another limiting factor is the availability of funding. While this factor impacts on all dimensions of the potential of the office to provide services to individual dioceses, it has been felt most directly in the limitation of funds available for travel. In the one "on-site" involvement mentioned above, travel costs were borne almost exclusively by the diocese requesting the service—and it appears that this would of necessity be the general norm for future projects of this nature.

It might also be useful at this point to mention another limiting factor which applies in a particular way to the scheduling of possible diocesan involvement: the need for maintaining a high degree of flexibility in terms of ability to respond on an immediate basis to unanticipated demands from the Committee on Research, Plans and Programs or from the General Secretary. This is par-

ticularly important with reference to the organizational (structural and procedural) dimension of the total responsibility of the office.

Finally, there are a number of limitations arising out of the planning discipline itself, relating primarily to the timing and "interchangeability" factors.

Planning, perhaps more than most other management functions, involves a critical timing dimension: the "right" solution at the wrong time can be more serious in its consequences than the complete absence of a solution arising out of a formal planning system.

Related to this is the fact that planning systems and solutions arrived at through them are not necessarily interchangeable.

These twin considerations are at the heart of the reservations already expressed regarding the introduction of specific and detailed planning services to individual dioceses, although they do not apply to materials of a relatively general nature.

Possible Guidelines for Planning Office Involvement

The discussion thus far suggests a number of tentative guidelines which might be applied in defining the limits of a possibly more formal role for this office in planning at the diocesan level:

1. The extent of Planning Office involvement would have to be determined, ultimately, by the availability of staff time.

2. The timing of Planning Office involvement would have to be sufficiently flexible to make possible the continuation of its present capacity for "instant responses" to the Committee on Research, Plans and Programs and to the General Secretary.

3. The nature of Planning Office involvement would have to be subject to the professional judgment of the Secretary for Planning in relation to the feasibility and viability of involvement in a particular situation at a particular time.

4. Across-the-board involvement by the Planning Office would have to be limited to planning as a discipline (i.e., general principles, standard practices, recognized norms, etc.).

5. Individual diocesan involvement by the Planning Office would have to be on a selective or pilot basis, with travel expenditures normally funded by the individual diocese requesting the service.

Specific Possibilities

Although the limitations discussed in the preceding pages are very real, they should not be read as an across-the-board "put-down" of the idea of more formal or more extensive Planning Office involvement in the diocesan-level planning function. Within the limitations, a number of positive options remain:

1. Continuing and perhaps expanding the present Planning Office involvement at the general level (as a source, for example, of basic planning information).

2. Expanding present informational involvement by providing, through the Planning Office, a clearing-house function for information on the planning efforts of individual dioceses.

3. Further exploration of the feasibility of more direct Planning Office involvement on a pilot basis in a single diocese (or a less extended involvement in two or three dioceses).

4. Fostering of the use of other existing or potential resources, such as the State Catholic Conferences, or (on a voluntary basis) professional planning personnel within individual dioceses.

5. Providing, through the Planning Office, an evaluative service with reference to planning proposals developed for individual dioceses by professional consulting services.

Continuing the present general level of involvement represents an absolute minimum. There is no intention on the part of this office to curtail its responses to specific requests—other than, as in the past, in terms of the practical limits already discussed.

The clearing-house function might be useful. An inherent difficulty might be the need to provide for insurance against assumptions of commonalities which do not actually exist among individual dioceses. Again, incorrect applications of processes or solutions which have worked well under non-comparable circumstances involve a higher degree of risk than is generally recognized. In this connection, it might be well to note here that there is a great deal to be said for a diocese-to-diocese approach on the questions under discussion: direct account can then be taken of commonalities or differences in making decisions as to applicability in one diocese of the experience of another.

The difficulties and problems inherent in the pilot approach have either been discussed earlier or are relatively self-evident.

The possible involvement of State Catholic Conferences is a very tentative suggestion: a recommendation for exploration rather than a recommendation for action.

The review of specific proposals has apparently proven useful to individual dioceses on a number of occasions.

Reference Notes

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