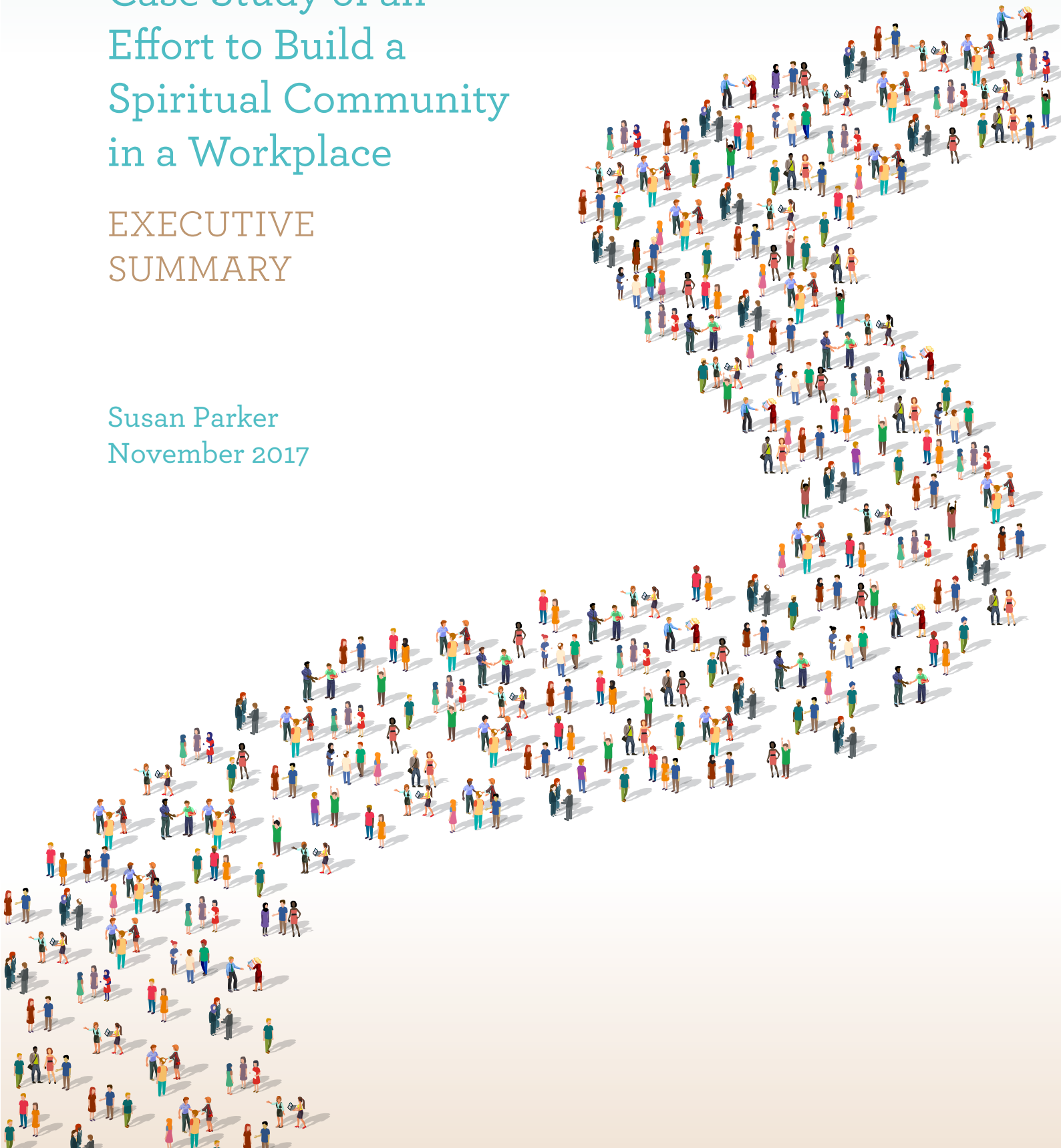


The Community
of Freedom at the
Fetzer Institute:
Case Study of an
Effort to Build a
Spiritual Community
in a Workplace

EXECUTIVE
SUMMARY

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Introduction


Each Tuesday morning, the entire organization of the Fetzer Institute puts aside whatever tasks they have at hand and comes together for three hours in an intentional effort to build a strong sense of community among the staff while cultivating their spiritual paths—however they define it.

This work in turn is aimed at percolating throughout the rest of the week, influencing both how those at Fetzer work and relate to each other and how they carry out the larger mission of the organization. Fetzer’s leadership made such a big commitment of time each week to these gatherings because they see this as foundational to all of the organization’s other work. If Fetzer, a philanthropic organization, is going to realize its vision of helping build the spiritual foundation for a loving world it must begin with itself.

Started in 2013, these gatherings have helped foster deeper connections to Fetzer’s work, a greater sense of trust in the leadership, more profound explorations of individual spiritual journeys, and more authentic relationships among colleagues. The work has also been difficult at times and left some people feeling that its aspirations do not always meet the day-to-day reality of the organization’s practices and policies.

Many organizations are looking at how to create workplaces that do not divide professional and personal lives so sharply and that nurture employees so that they can bring their full selves to their work. There are few roadmaps for how to do this.

Fetzer’s experience was informed by its particular history as an organization and its approach has elements that are unique to its culture. But through the first three years of this work, this experiment has helped Fetzer leadership and staff learn much about what it takes to carry out such an endeavor, reap the benefits of making such a commitment, and gain insights into navigating the inevitable challenges that come up along the way. These insights and learnings may be useful to other organizations looking to embark on similar work.



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What is the Fetzer Institute?

The Fetzer Institute, which began in 1954, is an operating foundation with a \$500 million endowment that supports projects that reflect its founder John Fetzer’s deep interest in science and spirituality, and the integration of spirit, mind, and body. Over the years, the Fetzer Institute has been an early supporter of efforts such as the mind-body-health field when it was far out of the mainstream. It also funded nascent work on mindfulness-based stress reduction and emotional literacy. The Fetzer Institute has about 60 employees with a diverse staff in terms of ethnicity and religion—Christians, Buddhists, Muslims, practitioners of earth-based religions, and those who are not part of organized religions all work there.

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In the late 1980s, near the end of his life John Fetzer was thinking about how to ensure that the work of the Fetzer Institute would continue and carry out its mission for centuries to come. John Fetzer believed that for a place like the Fetzer Institute to succeed and last it had to be more than a collection of individuals working together.


Instead, it had to be a cohesive community that was bound together by a larger purpose. John Fetzer called this a “community of freedom.” What that meant in practice was not clear to most people at the time. But what was clear was that he saw an active and growing spiritual life as central to the lives of Fetzer staff and the Institute. After he died, John Fetzer’s vision for creating a community of freedom would occasionally surface as Institute presidents focused on the daily work of running an organization with large assets.

Why the Fetzer Institute started the Community of Freedom

In 2013, a crisis at the organization led Fetzer’s leadership to decide that they needed to take concrete steps to create the community of freedom that John Fetzer had long envisioned. After a period of upheaval and not long after carrying out a demanding, high-profile event, many staff were exhausted. Major personnel changes over the years including several firings of colleagues had also severely eroded the trust that many staff felt in the leadership. The appointment of a new president added to the anxiety and uncertainty.

Bob Boisture, Fetzer’s new president who had been long associated with the Institute in providing legal counsel, believed strongly—along with the Fetzer board and senior leadership—that for the organization to heal and move forward together, it was vital that the entire staff spend dedicated time together each week.

Given Fetzer’s mission, the intent was to create a community where people can come to work and be their full, authentic selves. Fetzer leadership also hoped to create a space for all staff to deepen their relationships with one another and find common ground. What’s more, providing the space to develop such a community could help Fetzer become a more effective organization if it could create a culture of love and authenticity and develop the skills to lean into challenging situations.



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How the Community of Freedom works

To try and reach these goals, Fetzer leadership believed they had to start with some committed time each week to begin to put this idea in action. The gatherings initially took place on Wednesday mornings from 9am to noon because Fetzer leadership felt it was crucial that the community of freedom have a central place in the work week (it was later changed to Tuesday mornings to better accommodate schedules).


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The initial aim for the sessions was 2/3 content—often on Fetzer’s history and mission and on practical tools to help people relate to one another more effectively—and 1/3 on learning and engaging in different contemplative practices. At the start, senior leaders planned much of the content, assisted by a team consisting of representatives from every department at Fetzer.

The gatherings were mandatory. Everyone—including culinary staff, buildings and grounds workers, administrative assistants, program staff, and senior leadership—were required to attend. That decision was made because in the past, Fetzer had tried to foster spiritual community and made it optional, which unintentionally led to in groups and out groups.

Over the first few years, as participants learned what was working and what needed to evolve, the weekly gatherings shifted in content and leadership. For example, after the first few months of the work being led by a small group of senior leaders, working groups led by staff formed and presented on topics they were interested in such as how to communicate effectively, emotional intelligence, and mindfulness.

When people asked for more time to pursue their own spiritual interests, the Wednesday sessions shifted to provide opportunities for individual exploration as well as small group gatherings on topics people were interested in, such as spiritual parenting. More recently, optional safe space/brave space gatherings have been held where people can talk honestly about difficult and polarizing issues, such as the 2016 presidential election.



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Methodology of this Case Study

To capture the work of the first three years of the community of freedom, Fetzer commissioned an independent case study to help provide a synthesis of the successes, disappointments, stumbling blocks, and breakthroughs of the community of freedom since its inception. Preparation of this participatory case in 2016 and 2017 included review of background documents, 33 individual interviews, five group interviews (in which a total of 47 people were interviewed), three facilitation sessions with the full Fetzer staff, and ongoing consultation and check-ins with the Fetzer staff overseeing the project.

Positive changes

The interviews and facilitation process found a number of positive changes from this dedicated effort. Among them:

- **This work has improved relationships, morale, and the ability of staff to tackle difficult conversations.** The weekly gatherings provided staff an opportunity to get to know one another, sometimes for the first time, and often at a much more profound level than before. Part of the weekly gatherings included training in how to have direct, honest, and respectful conversations. That training enabled staff to have “real” conversations with each other and change what has been perceived negatively as a culture of politeness and conflict avoidance at Fetzer. Those relationships and the practice of assuming positive intent have broken down barriers between individuals and departments and contributed to more effective working relationships and increasing morale.
- **For many, this work has resulted in spiritual growth and a sense of connection to something larger.** Individual and group exploration times enabled staff members to explore their spiritual paths in ways that they have not been able to in the past and which many appreciate as a rare opportunity to pursue in a business setting. The community of freedom helped some staff feel a greater cohesion between their personal life and their work life and gave them a sense of integration that they hadn’t experienced before. The weekly gatherings helped foster a deeper sense of community, with some staff saying that they feel part of something bigger and more impactful now.
- **This effort supported personal and community healing.** The commitment to building a community of freedom and particularly the time spent in the weekly gatherings helped promote healing after a tumultuous and difficult period. Most people perceived it as an important and needed step for the organization to move forward as a whole.
- **Fetzer’s president found that these weekly gatherings greatly decreased the sense of loneliness he was feeling as he was trying to address a number of organizational challenges after a difficult past at the Institute.** In the midst of a high-stress period, he found these gatherings to be a place where he could be vulnerable and feel supported and trusted by the Fetzer community.

What helped spark those changes

The case study found that a number of elements helped create the conditions for these changes to take place.

- **Fetzer’s history and spiritual grounding provided the foundation for the community of freedom to start in 2013.** From its inception, Fetzer has had a spiritual mission that has been at the center of its work. That mission helped leadership make the case that this work was a natural outgrowth of the organization’s mission and values.
- **Some staff noted that they had built a resilience from closely collaborating on a high-stakes public event that they could draw from in engaging in this work, which was demanding in a different way.** That resilience, and the trust it built from needing to count on colleagues in carrying out such an event, provided an important foundation to start this work.

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- **Having strong leadership commit to this and stay the course helped staff see over time that this was an important part of their work.** From the start, the president, Fetzer board, and senior leaders made it clear that they viewed this as the most central aspect of the organization's work moving forward. That ongoing commitment helped people begin to believe that this was not just another one-time organizational development effort but something that was here to stay.

Many staff also sensed an increased vulnerability and openness in leadership and the board. They saw this manifested as a willingness to be challenged, admit mistakes, and be self-reflective in front of staff. This increased the sense of connection between staff and leadership, and helped staff feel more trustful about the leadership. The humility and vulnerability that staff saw from leadership seemed to be critical to people believing that the community of freedom really is a space for genuine community and personal exploration.

- **Assigning a staff member to coordinate and oversee the logistics of the weekly gatherings was an important element of providing consistency as well as regular avenues to solicit feedback from staff about this work.** Carrying out such an effort was too much for the initial person in charge, who held a senior leadership role and already had a full-time job. Giving that role to someone who expressed interest and was enthusiastic about this work was a key evolutionary moment, which happened about a year into the effort.
- **Providing practical tools and training during some of the weekly gatherings helped staff gain new skills to “translate” this work into their daily work and relationships.** From time to time, the weekly gatherings included trainings in such areas as how to have direct, honest, and respectful conversations and a model of personality types. Those trainings gave staff members tools to use in the sometimes difficult work of being more authentic with one another.
- **Having a mix of formats and content increased a sense of inclusivity and comfort among participants.** Over time, the community of freedom gatherings included a greater variety of approaches including more individualized time, opportunities to meet in small groups, and chances to hear from nationally recognized speakers on a variety of topics. The planning committee also made adjustments to increase participants' comfort such as making it clearer that no one needed to feel that they had to share during small group gatherings and could opt out altogether if they wished. These changes increased the sense of inclusivity by accommodating different personal styles, comfort levels, and areas of interest.

Challenges along the way

The case study revealed the following challenges in carrying out this work.

- **For a number of staff, abstract language used to describe the community of freedom made it difficult for them to grasp just what this actually meant.** There was a particular difficulty in understanding how the Wednesday morning gatherings were meant to translate into people's day-to-day work and carrying out Fetzer's mission. Part of the difficulty was that at the beginning of this work Fetzer's president used academic terms that were not familiar to all staff, rather than describing the community of freedom in simple, everyday language.

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- **There was uncertainty about the meaning and purpose of the weekly gatherings in relation to the rest of Fetzer’s work.** People said that the connection between the community of freedom and the rest of their work was often unclear to them, which made it difficult to understand how to bring the work of the Wednesday mornings into their day-to-day responsibilities. Some people wanted more discussion of that connection at the weekly gatherings themselves. Some staff also wished that more work-related issues including firings or new directions for the organization could be discussed directly in the weekly gatherings, which they thought would help in providing a clear connection between those gatherings and how they should influence Fetzer’s larger work.
- **Organizational policies and practices could feel at odds with the values espoused at the weekly gatherings.** These issues, at their core, seemed to revolve around a sense of fairness, trust, and kindness, which are likely issues that happen at most organizations. But they felt particularly jarring at an organization like Fetzer because of its values and commitment to the community of freedom. Most people interviewed said that they believed in the work of the community of freedom. But they said that they would get derailed and lose some trust in the work when they had experiences with colleagues and organizational policies that felt at odds with the values of the community of freedom.

Learnings

The case study process and follow-up discussions with Fetzer staff revealed the following learnings from this work.

- **It is vital to spend a good deal of time on creating a shared and deep understanding of the purpose of this work.** This is particularly true at the start of an initiative such as this if most people did not have an expectation that this would be part of their work when they were hired. Staff said that it was important for their understanding for leaders to make an explicit connection between the three-hour meetings and the larger organizational work. In the absence of such a shared understanding, it takes much longer for an approach like this to fully take hold. In retrospect, it would have been helpful to describe the community of freedom in clear, simple language and make the connections between the purpose of the weekly gatherings and the larger work of the organization as understandable as possible.

One approach to creating shared understanding that Fetzer is considering is to regularly revisit the historical origins and principles of the organization, particularly when new staff comes on board. Another is to build time for group reflection about what is working and what is not, which can be another way to hone understanding and buy in.
- **Fetzer found it equally necessary to dedicate significant time for all members of the organization to build relationships with another, which is a cornerstone to establishing trust and greater authenticity among all staff.** Staff interviewed appreciated the amount of time that Fetzer dedicated for them to get to know one another on a deeper level. An approach such as this one requires some vulnerability and that can only take place when people feel a sense of trust with their colleagues. This step cannot be short cut—building relationships and trust only happens over time. It takes a concerted effort to make space for staff to be together on a regular basis and have opportunities to “go deeper” with one another than they typically do during workday interactions.

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- **Cultivating a sense of shared ownership and responsibility is critical so that everyone feels like they have input into the process and they are part of a community like this.** Over time, Fetzer found that it was important to not only solicit feedback and participation, but to outline clearly how that input would be taken up so that staff would feel that their involvement was meaningful.
- **Upheavals or crises in the workplace affect this work, and it is important to find ways to address them directly.** The work that Fetzer is undertaking during the community of freedom gatherings has been affected by upheavals in the organization and, at times, such disruptions negatively impacted the weekly gatherings. But it has been rare to address conflicts or staff changes during these meetings. To prevent the organization from getting derailed, some Fetzer staff said that it would be helpful to directly address conflicts or staff changes at the weekly gatherings.

Taking it a step further, an approach such as Fetzer's, which provides for a regular gathering of all employees, could provide a forum to address problems that arise in any organization. For example, they could be a place where members of an organization could express their feelings about a conflict or grieve the departure of a staff member without having to choose sides, which could provide important growth for an organization.

Next steps

Fetzer's community of freedom continues to evolve. In 2017, the planning committee announced a multi-year effort, much of which addressed feedback from the Fetzer community. Among the plans were to take what seemed to be the next logical step in this effort. After three years of developing a sense of community within Fetzer, part of the plans included a focus on integrating community of freedom programming with external program efforts. That is, going forward part of the work would seek to more closely connect what goes on in the weekly gatherings with Fetzer's efforts to make an impact in the world.

Conclusion

When senior leaders at the Fetzer Institute decided in 2013 to create the community of freedom, they did not have a clear roadmap. Instead, they started with the organization's mission and long-standing values and built it from there. They also had an overriding goal: to create a community where people can come to work and be their full, authentic selves while cultivating their spiritual path—however they define it. Over the years, with increasing participation from the entire organization, leadership and members of the planning committee continually adapted the details of the work while striving to adhere to the original vision.

Despite challenges in carrying out this program designed to support spiritual development in the workplace, Fetzer's leadership have found it well worth the investment of time and resources. They and staff point to concrete changes including more meaningful relationships that in turn make it easier to navigate the inevitable conflicts that come up in any organization. Staff also report a greater connection to Fetzer's work and a renewed sense of trust in the leadership. The work of the community of freedom is a work in progress, and it is one that Fetzer leadership views as central to fulfilling the mission and values of the organization.

