Balance and Authenticity
Being all things to all people – self, family, colleagues
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Abstract:
This presentation explores the topic from personal and organisational perspectives. In the “Reflection from a Personal Perspective”, Anne shares reflections from her lived experiences as Executive Director of Schools in the Diocese of Parramatta since 1997. She considers the delicate balance between multiple agendas, the constant need to reprioritize, the importance of making space for what we value, staying within the discipline of the role and the task of senior women in organisations to facilitate balance and authenticity for others.
In the “Reflection on an Organisational Journey”, Patricia charts the organisational journey of the Catholic Education Office Parramatta in seeking to incorporate balance and authenticity for women into structures, policies and practices. The paper seeks to demystify the concepts of balance and authenticity, identify the commonalities across roles and engage in some discussion about the realities affecting the operation of women in senior and executive roles.

INTRODUCTION
In the first keynote address of our conference, Geraldine took as her theme the question, “Who do you say I am?” We believe that in shaping our own deepest held beliefs, values and principles, we have asked and answered this question of ourselves many times. As an organisation, we have also attempted to live by clearly named values, beliefs and principles, and to articulate and support them in our planning and policy. While balance and authenticity are essential for all staff, a number of factors led to us taking steps to address issues related particularly to women in the period 1999 to the present.

Key factors included the revision of our Mission Statement, the findings of research into leadership carried out at our request and the revised requirements of Equal Opportunity reporting. Each of these areas gave us insights into the challenges faced by women both in managing multiple agendas and responsibilities and in exercising leadership which sometimes challenged previous or existing patterns and models.

Our Vision Statement has four key components, each of which provided food for reflection and a springboard for developments conducive to balance and authenticity for women.
Our system of schools seeks to be:
1. authentically Catholic
2. inviting, inclusive and just
3. committed to quality teaching and learning
4. supportive of the ongoing development of staff

In our abstract, we said we would demystify the concepts of balance and authenticity. Perhaps it is more accurate to say we would present a workable definition in the context of our own organisation and experience with an emphasis on the role of leaders in creating and sustaining environments where people can live balanced and authentic lives.

Parker Palmer: “A leader is a person who has an unusual degree of power to create the conditions under which other people must lie and move and have their being.”

When we talk about balance, we mean a capacity to manage our working lives effectively and healthily within clearly defined and agreed upon parameters. We see authenticity as a high degree of congruence between personal and professional values, beliefs and principles and the realities of the working environment.

REFLECTION FROM A PERSONAL PERSPECTIVE
1. Not “Balance” but Balancing
I am sure as I stand here this morning that my experiences are echoed in various ways by each of you. The sobering context is this: we live in a time when Australia is the third highest user of antidepressant medication in the world, and many people (or at least city people) seem to live a roller coaster balance of time even in their personal lives.

My starting point for this reflection is to stress that in this context “balance” is a verb far more than it is a noun. The challenge for women in any kind of full-time role outside the home is an active state of balancing. Like the washing up, it is not done once for all, but is a constant process of focus and re-naming priorities and re-focus. And if the role is a senior one with responsibilities and implications for availability which that implies, then the balancing is even more active.

A little personal background might be helpful. I joined Catholic Education Office Parramatta in 1990 as Assistant Director, responsible for the oversight of schools and their leadership. My husband and I have three children, and at that time our first daughter was aged 3½ and our twins were around 18months. I have to admit there was a deliberate, but quite narrow, focus to my life in those years: family and the role. Balancing related to time and energy, - I lost count of the other “on-costs” of my role: the penalty rate $1 a minute per child to collect children late from childcare!
I would like to offer a word of encouragement to anyone of you who presently has young children. Fifteen years, deferred concerts and other recreational delights later, I now enjoy a more diversified lifestyle.

An essential tool for me has become the regular pause to refocus the agenda. In Covey language, I find that it not only helpful, but essential, that I regularly stop to rename the “big rocks” and ensure there is space for them. In the early years of my responsibilities, I actually resisted applying such discipline to my home and personal life. As in so many other areas, I have learned the foolishness of this arbitrary division. And now the “big rocks” include the personal, the spiritual, the physical, the relational, the aesthetic, etc, as well as the professional.

2. Make space for what you value
The constant re-focusing of priorities helps me to maintain a clear view of what is important, of what is of value. And of course, some big rocks change over time. Making space for what is of value is also about becoming an agent of my own life-work choices. I have had to seek new pathways for me as mother, wife, daughter, sister, friend, professional, which were not the pathways of my mother and older sister. The longer I live the more I have come to understand and to admire my mother, but for me to have attempted to reproduce her way of being mother would have been to choose to fail.

Making space for what one values has been a useful tool in managing a working life. When I was first appointed to CEO, I was at pains to exercise the role, as if I didn’t have small children to care for. I was determined to make no excuses for how I fulfilled the role, and so, made the ridiculous mistake of trying to exercise the role as if the children didn’t make any difference! This was nonsense…. How ironic for an educator! After all, my children had made the most profound difference of all in my capacity to understand other children! Possibly, (and I hope) I carried the burden of that more than the children did.

Fortunately, by the time I assumed my current role, I had become just a little wiser, -and just as well, because the possibilities for evening and weekend functions simply multiplied with the role. So now, I have one diary, and it includes in advance all that I value: picking up my son from boarding school, parent-teacher meetings, my daughter’s choir commitments, my husband’s political meetings, my exercise sessions, my mammogram appointment, my three annual retreat days……..

Where you place your time you place your life, and where you place your life, you place your love. (Clayton Barbeau)
I have learnt to delegate more. I can exercise the option of “trading” time by buying assistance in household duties. I have learnt the satisfaction of declining an invitation on the grounds I have a prior commitment. Just because that commitment might be the Saturday thrill of hanging the washing, or watching my son’s basketball game, watching Rosemary and Thyme with my daughter, or time with my husband, I believe it is no less important, or no less real a commitment.

There is, of course, no magic formula. I have not simply ruled out all out-of-hours work or commitments. That would be irresponsible. It is about balancing the things which I value and creating space for them. My husband’s very eastern approach to the use of time has allowed me to question the rigid boundaries I might once have applied to “time for work”, “time for re-creation” categories.

As a result, I have become quite agile and opportunistic, for example, with my weekend program. A family member has a commitment in the city lasting 3-4 hours, and it is a brilliant Sydney autumn day. Why not go with her and spend the intervening time, with my paperwork and reading, in the sunshine overlooking Sydney Harbour? And put in the walking shoes as well for good measure. Some Saturdays, however, I might deliberately choose to spend in the office “catching up”, especially if other members of the family are all engaged in their own pursuits elsewhere. Of course, that might also be the very reason to stay at home! If, like me, you happen to be inclined towards introversion rather than extraversion, then it is crucial to seek out quiet time to renew one’s energy.

3. Management of multiple agendas: being strategic
In all of this, the constant challenge I find is to be strategic: to find long-term pathways rather than short-term stop-gaps. Leunig, “How to get there” is quirky and true, but only partly true. There is an element of simply going forward, keeping on going towards the horizon, of daily fidelity to the direction one has set and fidelity to the call of your beliefs and responsibilities.

As leaders with senior responsibilities in our areas of ministry, it is also more. It must also be about being strategic in claiming how we get to the horizon. I don’t want to spoil the joy of Leunig or belabour the point. But in many ways this is how we have done it for too long. Now is the time to harness energies and structures and processes for maximum return. Leunig’s cartoon does not allow for the important questions which we must ask from time to time, such as, “should we keep on going” – with this school, or this approach, or this structure, etc? “Should we just keep on with it?” – when it might be a path for a time which is past. I have great admiration for the capacity of the leaders of religious congregations, - especially those of women,- to recognise when the time is right to face and answer such questions.
Being strategic can perhaps be a particular challenge for good Catholic girls of a certain age who like to attend properly to all the details. And if my story is similar to yours, then in many ways, there is an element of having “growed like Topsy” a bit into our roles, rather than being deliberately prepared for them. . Is this true? I was a teacher who is now an executive director, and I like to think, still an educator. The current scope and responsibilities of senior church leaders are significant. (eg, CEO Parramatta has an annual budget of $350 million, 4000 staff over more than 82 sites.) Did I set out with the ambition to lead a $350million enterprise? To be one of the largest employers in Western Sydney? As a young woman, I fell in love with the promise and excitement of Vatican II, and I am still in love with its mission, the enormity and wonder of a mandate to make God and Jesus present and visible to children and young people. But, this is not territory for amateur administrators and directors. I have learnt that the hard way. And we, current senior leaders in the Church, will have failed the women who come after us, if they are not prepared with the appropriate range of skill sets for new jobs in a new age.

By being strategic, I mean, too, more than answering the question, If I were CEO of ANZ/Telstra, etc, how would I make time for Wednesday golf? To be strategic is to put yourself in a position to see the overview, the big picture; to create and use structures and processes to support and inform; and to have access to the right information at the right time. On this last point, for example, - and I ask you to excuse me for referring again to education, and I do not know if the following applies also in other ministries - most senior leaders in Catholic education come from a teaching or academic background. This predisposes us to carefully argued, elegantly phrased, discursive evaluations and discussion papers. Occasionally, there is a place for such papers. Now, what I need also are short one-page reports, crisp on data, focused in considered interpretative comment and judgement, unambiguous in their relationship to our mission, and short on rhetoric and jargon. Such reports (by and large) are new to our school system and so challenge us all.

Being strategic is also about maintaining a focus on what is essential and what offers leverage for moving our mission forward. Time and resources are growing shorter both at work and in our personal lives. In our leadership roles, we need to be strategic and smart in creating the time within our working days to discern the significance – the meaning - of the evidence we see and to discern the most effective way forward. For me personally, this remains one of the ongoing challenges of the role, - yet it is at its heart.
4. Stay within the discipline of the role
At this stage, I would like to rewrite the subtitle for this paper with three brief comments:
(i) I do not seek to be all things to myself. (For this I have my faith in God, my family, friends and a world of communities.)
(ii) I do not seek to be all things to my family. (My husband and I married as two independent adults; our children are gifts entrusted to us so that we will enable them to leave us and stand alone)
(iii) I do not seek to be all things to my colleagues. (Ours is a relationship of professional colleagues and a community of shared mission and faith. The relationship should be life-promoting and based on mutual regard, but not one where I seek to address all my personal needs.)

I try to make clear to principals in our 75 schools, that I expect them to manage their role strategically, that is, to take charge of their roles and take charge of their lives. I hope it is obvious that I am sympathetic to the challenges and the fragility of this “taking charge”…. It sounds far more assertive than it usually is in practice. The fact is, however, that the role of school principal, (and any senior leadership role) is complex and demanding and messy. From time to time, it is to be expected that reflective leaders will feel, perhaps not quite victimized by aspects of their role, but certainly not completely “in charge”. That is OK, - but not as an ongoing mode of operation. One of my responsibilities, in those circumstances, is to discern and to lead by changing what should be changed, - whether that is an organisational obstacle, or a personal capacity, or (in extreme situations) the role itself.

The fact is that we are in roles which usually give us great energy. It is work which we love doing; work that we passionately believe in; work which is a privilege, and which permits us to work as companions with women and men of inspiring integrity, vision and imagination. Nonetheless, and maybe because of this, it is absolutely essential to view our roles as roles. We are not the role. To fall into that thinking is to go down the path of pathology.

Ian Hutchinson poses the following question: Do we leave work to go home to get on with the rest of life, or do we go home to recover from work? What is more appropriate for a leader in a Catholic agency?

5. Responsibility to facilitate balance and authenticity for others
A few thoughts on the responsibility which I perceive we carry as senior leaders in facilitating balance and authenticity for those with whom we work. The starting point surely is that we model for others what we believe.
Last week I caught myself out, once again. I had been in the office from 8.00am. I had a Diocesan function at 7.00pm. As I packed to leave the office at 5.30pm, I began stuffing my bag with all sorts of goodies, - papers to read and write, letters to sign. Suddenly, I asked myself “Why?” And then I saw the ridiculousness of it all and unpacked it all again.

1. Do you encourage staff to leave work at a reasonable time?
2. Do you have a system to recognise staff achievements both inside and outside of work?
3. Is it true that if staff don’t put in long hours, they’re unlikely to get a promotion?
4. Is there a system in place for people to request and obtain flexible working hours?
5. If you leave/arrive at work at official times, do you feel guilty?

One of the most important lessons from our generation of women in leadership for the next could be that of choosing the time and personal circumstances when they seek out senior – and demanding – roles. It should not be an all or nothing choice. However, as an employer, that means that I should be creative enough to ensure that recruitment criteria and processes recognize the talents, skills and attributes of those, - especially women, - who have come to roles through different paths and at different times. I do not believe there is shortage of appropriate people to assume leadership roles in the Church. But I believe we will put future Church leadership at risk if we are too narrow in the range of women and men we attract to positions or if we eliminate some people too early because they have not travelled a predictable employment path.

Clearly, we need to go beyond advice and modeling to establish structures and policies which support and enable a healthy work/life balance.

Patricia will now speak to the journey of Catholic Education office Parramatta in seeking to incorporate balance and authenticity for women into structures, policies and practices.

REFLECTION ON AN ORGANISATIONAL JOURNEY

I can speak of the organisational journey until the end of 2003. Until then, and, I am sure, beyond this time, the journey encompassed research, discussion, strategic planning, informal and formal networking and policy development. Telling the story is quite straightforward, but because we have been asked to focus on balance and authenticity, I have tried to use these concepts as guiding principles and reference points throughout the story.
Knowing that the Equal Opportunity agenda and Women in Leadership would be part of my workload in 2000, towards the end of 1999 I started to gather resources and do some research. I thought Women in Leadership Conference in Fremantle (sponsored at that time through Edith Cowan University) could be a good starting point so in November 1999 two women principals and two senior staff from the Catholic Education Office attended the International Women in Leadership conference in Perth. We had a ball and just as importantly this shared experience validated our own perspectives and opened up some planning possibilities. In particular, it strengthened a belief in the value of structured mentoring. We also found Margaret Vinnicombe’s work on Image Management very useful.

The concept of image management does not sit comfortably with many women, particularly the good Catholic girls Anne mentioned. Vinnicombe defines image management as “the process whereby individuals seek to influence the perceptions of others about their own image.” She cites a study undertaken to determine why only 30% of management consultants were women. Why do they not come in and why do they not stay? In semi structured interviews with 15 male and 19 female consultants, three basic questions were asked:

| What advice would you give someone to get on in the business? |
| What are the things to avoid? |
| Is promotion fair? |

The main difference between males and females was that males were more direct, gave less justification for their advice and their advice was indicative of their own behaviour. Females rarely spoke in the first person, justified their advice more, and indicated they would probably not take their own advice. Males saw visibility as nothing to do with academic qualifications, but were adamant about developing a profile. Females expect people to notice because we work really hard whereas males tell everyone how brilliant they are. They paid lip service to formal processes but said, really, forget it if you are not aligned with the right people.

While I would be hesitant to translate these findings directly to our Catholic education system, there was enough there to make some great conversation starters, which invariably led to reflections on authenticity for women engaged in leadership. Issues of justice, equity and the right and responsibility to use one’s gifts to the maximum also featured highly.

So there were a number of factors that came together at the beginning of 2000. We had the findings of 1999 research by Paul Harney about leadership in our Diocese which included a section specific to women leaders, a clear agenda from the revised Equal Opportunity for Women in the Workplace requirements and a revised Vision
Statement unequivocally committed to inclusiveness, justice and staff development. The System Leadership Committee, together with Division for Professional Leadership and Development, ACU and our Human Services Department was at the same time planning a Leadership Development Program for middle managers.

In a series of workshops for women leaders during 2000, we discussed the research findings and in October a group of women leaders from schools and the Catholic Education Office developed a Vision Statement for women. The concepts of balance and authenticity underpin this statement.

“We envision a future for women leaders in a system that has the best possible leaders for the best possible Catholic education of children and young people in a culture that acknowledges, respects, values, invites and celebrates difference

where leadership has been redefined as a passion for education, supported by just processes at system level characterised by openness of thinking, flexible structures and processes and freedom of choice and action in choosing and exercising leadership

where women are recognised and visible at all levels of leadership and the role of leader is a viable one for them” where mutual support and affirmation characterise the community of leaders”

I think it is interesting that the word, “women” occurs only twice in such a statement. The overwhelming emphasis is on ministry, culture, values and mutuality. If we had gathered a group of our men, I doubt there would be much difference in their hopes and dreams for leaders in Catholic schools. In fact many of them at the time would have sincerely believed that this statement reflected reality. However, in 1999, the responses of women leaders to the Harney research indicated clearly that the reality for them was quite different. These are some of their words:
• “There is a real tension between maintaining integrity of personal leadership style and being taken seriously in a masculine environment”
• “Having a public voice in overwhelmingly male forums at CEO and other levels poses some obstacles”
• “Criteria for promotion can pose systemic barriers for women at each level leading to principalship”
• “Career options for women 30-40 age group with family commitments are constrained”
• “Different sets of priorities and different life periods mean that timing of entry into leadership for women may be different from that of men”
• “Flexibility, including part time leadership positions would help”

In unpacking the Harney research, our women leaders identified issues common to both men and women, including remuneration levels, family commitments and perceptions of decreasing autonomy as demands from system, government, community and church increased the size and complexity of the job. A number of women spoke about perceived bias towards male applicants by some clergy and parent representatives. They also raised some concerns that male principals do not always discern and encourage female leadership and the need for career development skills. Part of my task became was to suggest and advocate ways in which these legitimate hopes and expectations could become a reality for women, men and the system as a whole.

Anne talked earlier about being strategic on a personal and professional level. Being strategic in this work for and with women meant trying to embed good practices rather than impose extras. So we used every bit of leverage from legal requirements to teasing out the implications of our Vision Statement. I did an audit identifying current good practice in areas identified by EOWA in their reporting processes, pointing out any capacity for improved outcomes as well as suggesting possible strategies.

Using the lens of Equal Opportunity legislation enhanced and focused our efforts. The reporting requirements gave an opportunity to gather data, disseminate information and also to shape a strategic response to research findings within a mandated and therefore legitimate framework. Also, revising the system policy from Affirmative Action to Equal Opportunity gave a good chance to work constructively with a representative, gender balanced working party, including the IEU. We produced a policy with a support document giving examples of good practice at school and Catholic Education Office levels.
Part of preparing for the EOWA report entailed gathering a variety of statistics. We expanded the database to include a detailed analysis of committee membership, both from the perspectives of gender and of positions represented. We did the same with selection panels for senior positions and also analysed the study support accessed by women and by men, both in the quantum and in the kind of formal study options accessed. The analysis of all promotions positions in schools and at the Catholic Education Office also included gender and the type of positions being accessed. The composition of executives at both primary and secondary schools has also been tracked. We presented this information to senior staff from Catholic Education Office and school principals in early 2001. I took as a template the proportion of men and women at each level, the existing gender configurations and what it would look like if women and men were represented proportionately at each level. For example, the Secondary Principals Association opening prayer would not sound so much like a male Welsh Choir revving up to sing at the football.

There have been other significant policy developments, including the revised Equal Opportunity Policy, and the Stay in Touch program for women on maternity leave that came from suggestions made by Principals. It has had a high participation rate—about thirty women each year. Related polices such as revised Jobshare guidelines, Maintaining Right Relations, addressing harassment, bullying and discrimination have been very effective in engaging staff in the agenda and they have also clarified expectations, rights and fair procedures. Currently, there is in draft a document drawing together all the policies guidelines and resources relevant to work-life balance.

Many of our women are balancing family, teaching and advanced study. For them, a voluntary networking approach seems to have been helpful. From 2001, we held an annual WIL Dinner, with attendances of about one hundred, and regularly sponsored a table at the Parramatta Businesswomen’s Breakfasts. Deliberately becoming involved in wider networks of women stretched our horizons. We also managed to get the lucky door prizes on an embarrassing number of occasions. Again, we offered invitations widely and welcomed a range of women. It was particularly pleasing when our secretarial staff from schools and the Catholic Education Office could join us.

From 2001-2003, we offered a range of developmental experiences to middle managers, for example, a presentation from the Head of Division, Appointments, and Personnel, on leadership recruitment and selection processes and guest speakers on topics such as job coaching. The WIL budget assisted groups of women in attending conferences, including the WIL conference in Perth and the Advancing Women Conferences in Canberra. In 2003, we ran a pilot structured Mentoring Program for women. This was an open invitation and we ended up with 35 women,
ranging from teachers in their first few years of teaching to very experienced principals and Catholic Education Office staff. Matching the pairs up was both enjoyable and challenging.

I mentioned earlier that the commitments and beliefs articulated in the Vision Statement have provided both a touchstone and a challenge in advancing the concepts of *Equal Opportunity for Women in the Workplace* and the access of women to formal leadership positions.

The System Leadership Development Program for middle managers is now in its fourth year and I have been involved with one of the modules. I have been pleased to see the way women have taken up this program. I was even more pleased when at the last gathering on a cold, wet evening in the last week of term, when telling one of the women how much I admired the group for their commitment, she said that dinner would be ready for her when she got home. The family understood this was Mum’s time and she was not to do anything on the home front. Another member of the group missed the previous session because she had her baby but she was back for the last session, six-week old baby at home and she enjoying the companionship and stimulation of colleagues. This is what we had hoped might happen when we developed the *Stay in Touch Policy*.

There is no doubt that some years of resourcing and supporting a focus on Women in Leadership can be valuable in providing the richest possible pool of potential school leaders. The shape and content of such a program needs to be underpinned by methodical and systematic collection and analysis of data, by strategic approaches to obstacles, relevant professional development and support so that leadership is feasible and personally and professionally enriching. However, it would be simplistic to depend too much on such a program alone to address imbalances in the gender composition of school leaders. There are many factors at play that cannot be addressed by a single approach. Some are societal and some are inherited from previous models of Catholic education provision. Fairly recently, I read a paper given by Alison Morehead at an Institute for Family Studies conference. One of her major arguments is that “the very act of maintaining and negotiating the relationship between work and home constitutes a form of additional labour”, that “this sort of labour is ongoing- it is the work done an everyday basis so that the current relationship between home and work can continue”. She suggests “gender balanced work arrangements can be supported by family friendly policies, but only when fathers use them as well as mothers”. “The workplace has them available to both, but the household provides the cultural engine that drives the take up rate being so heavily skewed towards mothers.”
It reminds us that policies are useful and necessary but that true balance and authenticity for women are best achieved where men and women operate in a culture of mutual respect, affirmation and celebration of differences. We cannot intrude into family and personal arrangements but by encouraging women to use their gifts, be true to themselves, we can be sure that creative and even daring balancing acts will follow.

FACING THE FUTURE

With organizations which support the Church’s mission continuing to shift from “domestic” and personalized agencies to more sophisticated complex organizations, the issues of balance and authenticity for leaders and all staff will continue to need attention. From the perspective of the larger, well-established ministry of Catholic schooling, my sense is that this will continue as an important issue. However, I believe, that it will be even more important in smaller ministries and agencies, where people can work in some isolation and without some of the resources which large organisations generate, (eg, in human resource management.)

In this context, and keeping in mind the points Patricia and I have already touched on, I will conclude with some further pointers to where I believe effort could – and should - be addressed in the Church in the interests of greater balance and authenticity in those exercising leadership, that is, in the interests of supporting leaders who are more wholistic, more fully human.

(i) The resources of the Church need to be creatively coordinated, so that the experience, skills and resources of each ministry can contribute to building up the whole body of wisdom in this area. This conference is a very welcome example of such coordination.

(ii) More specifically, the next generation of leaders deserve to be prepared for their role and resourced in it: mentors, courses, forums, support for the full range of skills required for the complex business operations which support contemporary ministries. An essential assumption of this is that each and every role is clearly delineated, - and of course I don’t mean prescribed, - with expectations, limits and reporting requirements clarified and formalised.

(iii) We, the present senior leaders, have a responsibility to continue to be proactive in initiating initiatives which support balance and authenticity for all staff, but especially in a way which ensures that capable and passionate women of faith will see that there is scope for them to contribute to the exciting work of the Church today.
Finally, what would I say to one of my daughters if she were to embark upon a role such as ours? What advice of a more personal nature would I want to give to our younger sisters that might help them to serve in such a ministry? My advice would be simple:

(i) make time to pray, but more importantly, make prayerfulness your stance on life
(ii) seek the counsel of a trusted and honest advisor, but be part of a wide, broad-based community
(iii) no matter how busy you are, always make time for some small service to those who are in need. It is too easy to say, “I’m doing enough in my role. I’m too busy to help others in my spare time.” But the responsibility to engage with others and to offer some service is part of our baptismal commitment and is part of being faithful to the baptism.