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Defining Faith-Based Organizations and Understanding Them Through Research

Wolfgang Bielefeld[1,2] and William Suhs Cleveland[3]

Abstract

Welfare reform discussions in the 1990s included proposals for government to support religious organizations that provide social services. This fostered a debate about the proper relationship between government and faith-based organizations. This spurred an increase in academic publications by scholars from disciplines such as social work, religious studies, public policy, and nonprofit studies. Publications focused on a number of topics, including the unique characteristics of faith-based organizations, the services and outcomes they provided, their involvement with the government, and methodologies available for studying them. We found a rapid increase in publications starting in 1996. These peaked in 2003 and have declined since 2008. Our scan of the literature on U.S. noncongregation faith-based service providers identified over 600 works. In this article, we review the literature on the definition of faith-based organizations, typologies used to place them on a spectrum of religious expression, and methodological considerations for research on them.

Keywords

faith-based organizations, charitable choice, social services, religious identity, government funding

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Introduction

Without a doubt, the faith-based organizations that most immediately come to mind as potential social service providers are congregations and other houses of worship (Cnaan & Curtis, 2013, this issue). While these will not be the major focus of this article, they do figure in to the literature on religious organizations. Congregations were the subject of study during the early 20th century, including the activities of congregations during the turn of the century social gospel movement (Degler, 1950; Hopkins, 1940) and further into the early years of the 20th century (Douglass, 1926; Douglass & Brunner, 1935). Subsequent literature included a much broader cross section of faith-based organizations, especially as they grew to prominence with the potential of expanded government funding through programs like Charitable Choice and the Faith-Based Initiative. To better understand the examination of faith-based organizations, this article describes our literature scan method, defines faith-based organizations, and examines research methods used to study faith-based organizations.

McGrew and Cnaan (2006, p. 3) note that: "social science research has neglected the world of religion and religious-based services for almost a century." Wuthnow (2004, pp. 10-12) relates this neglect to the acceptance of a *modernization framework* which became popular among social scientists during the middle of the 20th century. According to this framework, as society becomes more modern and complex, the institutions that provide basic societal functions (such as social welfare) become more specialized, autonomous, and differentiated. In premodern periods in the United States (such as those characterizing colonial and early American history) social welfare was provided mostly by religious organizations alone or in partnership with secular agents. Eventually, the modern state took the lead in providing social welfare (Trattner, 1999). It was assumed that as part of this trend, religious organizations ceased providing public welfare and restricted themselves to serving spiritual needs.

The utility of the modernization framework as a basis for designing social welfare systems came increasingly under scrutiny in the latter decades of the 20th century (Olasky, 1992; Orloff, 1993; Skocpol, 1992). This opened the door for a reevaluation of the contributions that religion made and could continue to make in providing human services. Critics of public welfare claimed that religiously based services provided a number of benefits over secularly run programs. These claims became the basis of a series of proposals to facilitate the increased involvement of religious organizations in welfare provision. A significant milestone in putting these proposals into practice was the inclusion of the Charitable Choice provision in the Personal Responsibility and Work Opportunity Reconciliation Act (welfare reform) signed by President Clinton in August of 1996 (Bartkowski & Regis, 2003a).

Charitable Choice initiated a vigorous and often vitriolic debate about the benefits and detriments of the involvement of religious organizations in the public sphere. Policy makers, community leaders, academics, and practitioners all joined in. A variety of constitutional, policy, and operational issues were raised. (Kennedy & Bielefeld, 2006, p. 28). Without a doubt, one of the legacies of Charitable Choice was the upswing

of academic publications relating to faith-based organizations. Publications originated from a variety of disciplines including political science, public affairs and administration, social work, and religious studies to name a few.

Research has found that while most congregations engaged in some social service activity, they typically engaged in these services in only minor and peripheral ways, often providing for individuals' emergency needs (Chaves, 2004; Cnaan, Boddie, Handy, Yancey, & Schneider, 2002; Cnaan & Curtis, 2012; Hartford Institute for Religion Research, 2012; Hodgkinson, Weitzman & Kirsch, 1988; National Congregations Study, 2012; Wuthnow, 2004). In addition, Charitable Choice was not found to have significantly impacted congregations' social service activities (Chaves & Wineburg, 2010). Given this, most of the literature on religion and social service provision has not been about congregations. Rather, it has been about other religiously influenced organizations which have a more explicit goal and focus on providing services. These have been loosely termed faith-based service providers or merely faith-based organizations. We will use the latter terminology throughout the remainder of this article and shorten the designation to an organization such as this to "FBO" and refer to them collectively as "FBOs." Also in this article, we use the term *religion* or *religious* to describe broad activities that include different religious heritages and reserve the use of the term *faith* to describe specifically Christian activities.

Article Selection and Findings From the Literature Scan

This review assessed 889 books and peer-reviewed publications dating back to 1912 about FBOs identified through four searches. The first search was conducted on the Lake Institute Publications Database.[1] Search within this database yielded 439 relevant items using eight terms: *faith-based, faith-based organization, religious organization, parachurch, charitable choice, welfare reform, social service*, and *service provider*. The other three searches used well-known academic sources. The second search reviewed the contents of the six most frequently cited journals from the Lake Database search and added 100 additional items.[2] The third search used the term *faith-based organization* for articles in both ProQuest's *ABI/Inform Complete* and EBSCO's *Academic Search Premier* and added 92 relevant articles. The fourth search used the terms *faith* or *religion* combined with *social service* or *social service provision* for articles in the ProQuest and EBSCO databases and added 258 articles.

Due to the breadth of the topic, a number of areas of inquiry could not be included in our detailed analysis in this article and our other article in this issue. The exclusion of congregations left out discussions of the demographics and ethnicity of their service provision such as the contribution of African American churches to social services and communities. While a small number of case studies about specific organizations were included, no systematic effort was made to include the voluminous research about individual FBOs such as Catholic Charities or Habitat for Humanity. Also omitted was the extensive discussion of the role of religion in social work and social work education's role to prepare social workers for the best ways to serve clients in consideration of religious beliefs. Implementation issues discussed in "how-to" works geared more

Table 1. Number of Articles in Different Categories.

Main topic of article	All articles	Articles with a U.S. focus	U.S. focus, no congregations
Services provided by FBOs	425	344	273
Relationship between government and FBOs	282	227	194
Religion as a defining characteristic of FBOs	118	93	94
Methods used to research FBOs	64	52	50
Total	889	716	611

Note: FBOs = Faith-Based Organizations.

to practitioners within FBOs were also excluded. Any work including elements outside the United States was excluded due to the substantial differences in how FBOs relate to governments as well as underlying cultural variations (see Göçmen, 2013, this issue). Many international studies focused on the provision of development aid, peace building, and promotion of human rights. These exclusions resulted in a base of 611 relevant publications, as shown in Table 1.

We organized the review of this literature into four topical sections. While articles could have considered more than one topic, their major topic was identified and they were classified accordingly. Interrater reliability was ensured through the review and agreement of both authors about the topical relevance for all articles. The topics include the theological uniqueness and religious characteristics of FBOs, methodology for research on FBOS, the services provided by FBOs with their outcomes, and the involvement of FBOs with the government. The first two topics are covered in this article and the final two in a subsequent article in this issue. As shown in Table 1, nearly half of the articles focused on services, about one third on the relationship with the government, about one seventh on theological uniqueness and the remaining one twelfth on methods.

Analysis of the identified publications revealed two marked trends in scholarship about faith-based service providers. Prior to 1994, the average was less than one publication annually and only 15 of the 82 years between 1912 and 1993 had more than one publication. Given this low publication rate, articles published before 1994 are not shown in Figure 1. A steady increase in publication began in 1996 with a bump up to six publications. Publications peaked with 95 in 2003 and 94 in 2006. Second, the publication rate declined after this. In 2011 publications were in the low 20s, approximately the same as in 1999. If the trend of publishing for 2012 is maintained, that level will be equivalent to the 11 articles published in 1997. Whether the publication rate continues to decline to near-zero levels is yet to be seen.

The most obvious explanation for the rapid rise in publications is the intense debate arising out of the inclusion of the Charitable Choice provision in the 1996 welfare reform law. The provision immediately became a lightning rod for concerns about the pros and cons of government funding of religious organizations. It clearly tapped into ongoing underlying tensions in the United States about church–state relationships. Once this issue was thrust into the public sphere, however, other related questions

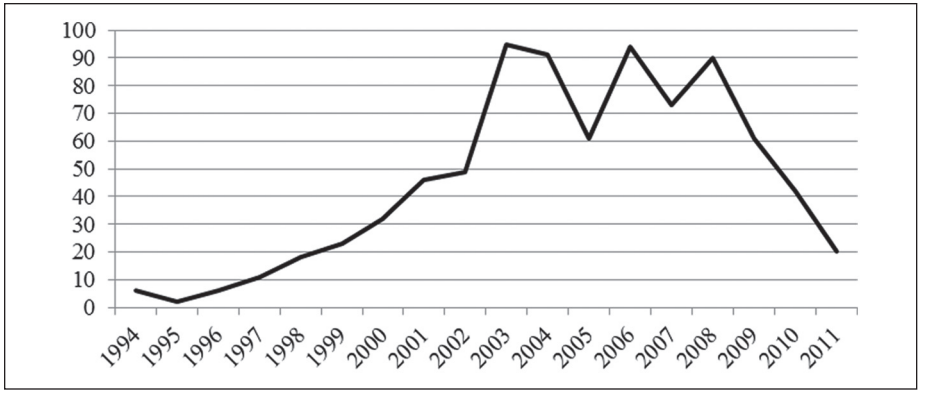

Figure 1. Number of scholarly publications about faith-based organizations: 1994–2011 (*n* = 889).

became subjects of interest, examination, and publication. Scholars from a number of disciplines realized that FBOs were theoretically interesting and substantively important organizations worthy of further study. As we will see, questions included the definition of FBOs, the role of theology in these organizations, and how theology influences the services they provide. Much of the discussion revolved around the differences between FBOs and their secular counterparts. Considerations of the interaction of FBOs with the government and other social services providers brought up additional questions. In addition to the question of the constitutionality of government funding of religious organizations, broader questions involved the relative contributions of the government, faith-based, and secular organizations to the provision of social services. Finally, since these were under-researched topics, a number of questions were raised about how to study FBOs. This led to substantial discussions about appropriate investigative methods.

What is a "Faith-Based" Organization?

Typologies of FBOs

There are many ways to assess the expression of religion related to the provision of social services among organizations. Two common strategies are to compare religious orientation in all organizations or to focus only on organizations which are explicitly faith-based. In both cases, various typologies characterize the spectrum of religious expression. Researchers define and redefine the spectrum of religious emphasis between FBOs to understand and explain the role of religion as a component of FBOs and the services provided. The various typologies share many commonalities with three major assessment categories: organizational control, expression of religion, and program implementation. Organizational control is examined through funding resources, power exercised within the organization, and decision-making processes. Expression of religion is examined through the self-identity of the

organization, religiosity of participants, and definition of outcome measures. Program implementation is examined through the selection of services provided, the integration of religious elements in service delivery, and the voluntary or mandatory participation in specific religious activities.

When examining only explicitly religious organizations, typologies categorize a spectrum of religiousness. Monsma (1996) surveyed organizations with Protestant, Catholic, and Jewish traditions which provided higher education, child services, or international aid. Religious practices of the organizations studied were categorized in multiple dimensions to arrive at a characterization of the organization as being low, medium, or high on a religious practices scale compared to peer organizations. Jeavons (1998) created a more detailed typology by articulating seven basic elements for assessing the religiousness of an organization. This typology addresses organizational control by including measures of the source and religious status of material resources; the religious nature of information management and decision-making processes; and religiosity in the definition, development, distribution, and use of power within the organization. The expression of religion includes measures of the religious self-identity of the organization and the religiosity of participants. Program implementation considers the overtly religious focus and presentation of goals, products, or services as well as the religious nature of the organizational fields or contexts of the organization's activities.

Contrasting religious and secular organizations also includes elements of organizational control, expression of religion, and program implementation. Delineating a comprehensive typology of both organizations and programs providing social services or education, Sider and Unruh (2004) developed a six-fold typology. The six categories include faith-permeated, faith-centered, faith-affiliated, faith background, faith–secular partnership, and secular. To categorize organizations, criteria include organizational control through personnel selection and financial support along with expression of religion through self-identity. To categorize programs, criteria include the environment in which it is conducted, religious content, integration of religious content with other program components, and connection between religious content and desired outcomes.

Three criticisms published in the same issue with the Sider and Unruh typology reflect difficulties in any systemic categorization. Jeavons (2004) highlighted how the problematic distinction between organizations and programs sidesteps the contentious issue of directly funding congregations providing social services. The Protestant Christian genesis of the typology clouds its applicability to other religions due to the emphasis on faith rather than religion. Restricting the expressive aspects of religion to the observable limits the discourse from exploring the more comprehensive, unobservable beliefs of organizations. Questions of who, what, and how are addressed but the important motivational question of why is not approached. Morally neutral behavior is difficult to identify and the content of all religions is not morally equivalent. Netting (2004) noted that organizations impact macrolevel social perceptions of what is desirable through their programs and questions how beneficiaries truly benefit through service quality, output measures, and outcomes. To address the issues of beliefs and

moral equivalence, Cameron (2004) underlined the importance of understanding what FBOs believe in and outlined a method for exploring specific beliefs. Probing this why question helps resolve the important policy dilemma of service provision as an expression of religion by the provider versus service provided to attract individuals for proselytization.

The relationship between strength of religion and categories of organizational control, expression of religion, and program implementation varied for organizations in several studies. In the broad spectrum of faith-related organizations studied by Smith and Sosin (2001), the closeness of ties or coupling of organizations to religion and the impact of this coupling on the structure and service offerings of the organization ranged from loose to tight. The majority of studied organizations had loose ties to religion for resources, moderate ties for culture, and tighter ties for authority. Religion was a much stronger driver for the selection of services while many of the aspects of service delivery were secularized. The mature Christian and Jewish FBOs studied by Green and Sherman (2002) had a uniform expression of religion with board, staff, and volunteers comprised of individuals with the same religious affiliation as the organization. This expression of religion included general agreement about the importance of spiritual transformation of the client, religious nature explicit in the mission statement, availability of staff to discuss religious matters with clients, and offering of optional religious programming. Variation of strength of religious relationship is evident in program implementation characterized on a six-point spectrum including not relevant, passively motivating staff and volunteers, invitational for clients to initiate discussion outside the program, relational mention by staff to engage clients in faith-based relationships, integrated but not required in service elements, and mandatory client participation. About two thirds of the organizations were categorized as not relevant or passive, about a quarter were relational or integrated, and with very little representation in the invitational or mandatory categories.

Evaluation of employment programs with varying profit and religious motives also exhibit the categories of organizational control, expression of religion, and program implementation. A survey of 509 welfare-to-work programs included organizations characterized as for-profit, secular nonprofit, FBOs both incorporating and not incorporating religious elements into services provided (Monsma & Mounts, 2002). Organizational control included measures of hiring preferences based on religion, and preferential client selection based on religion. Expression of religion included imagery within the facility, use of prayer, religious values motivating staff, and religious values motivating clients. Program implementation included consideration of voluntary religious activity, mandatory religious activity, and encouragement of clients to make religious commitments. A low-medium-high approach used for both religious and secular organizations by Bielefeld (2006) incorporated eight dimensions to measure the influence of religion on job services programs. Dimensions included the organizational control elements of organizational affiliation, funding sources, decision-making criteria, and staff assignment criteria. Expression of religion is seen in measures of shared beliefs of staff and volunteers, visibility of religiousness, and implicit nature of religiousness. Program implementation is simply seen in the services provided.

Organizations were ranked as not faith-based, moderately faith-based, and strongly faith-based. As expected, all of the government agencies in the study were not faith-based. A majority, 13, of the nonprofits were not faith-based, three were moderately faith-based, and six were strongly faith-based. Three of the five for-profit providers were moderately faith-based with one each in the other categories. This was noteworthy because it showed that for-profits can be FBOs.

Conceptualization of religion varies within organizations, especially as it applies to program implementation. Hugen and Venema (2009) examined over 1,100 human service programs which applied for the Acton Institute's Samaritan Award, one qualification being that less than 15% of the organization's budget should have come from government sources. In this group, variation existed for religion in its presentation to clients, its integration into the change model, and its inclusion as an outcome measure. About three quarters of the organizations held spirituality as highly or moderately central to their programs. One third of the programs implicitly, or passively, expressed religion in their programs; 40% of the programs explicitly included religion as a critical and or necessary element of participant change; and one eighth used an invitational or relational method to engage clients in religious elements outside the program. Just over one quarter of the programs measured faith-related outcomes for clients ranging from growth in religion, spirituality, or belief; change in behavior or lifestyle; or having a salvation experience. Nearly one third of the programs incorporated faith-related change elements into their change model. These elements included client religious practices, spiritual growth, religious transformation, behavioral change processes, or specific relationships created due to the program.

Maintaining Religious Identity

Maintaining religious identity in the face of powerful secularizing forces is not a new concern and must be managed by FBOs. In many FBOs, the mission helps maintain the religious identity of the organization from its founding and remains an important calling to attract and motivate employees and volunteers. Networking among coreligionists, especially those with the same beliefs who perform similar work in different locations, helps organizations reinforce religious identity through regular contact and interchange of people and ideas. Employees and volunteers express religion through daily activities and the culture they create can, in turn, profoundly influence the sponsoring religious organization. Flexibility and adaptation are very important for organizational survival and work well with organizations possessing a strong religious identity, although some circumstances result in organizations retreating from their religious identity.

Religious identity is taken as given and nonnegotiable with employees and volunteers as a way to resist secularizing pressures. Stakeholders with 15 organizations in Christian, Jewish, and Muslim traditions describe their moral imperative for service and personal belief in their accountability to God as more powerful than any pull to secularization (Netting, O'Connor, & Yancey, 2006). Trulear (2007) argues that this sense of calling helps maintain the mission for Christian FBOs rather than decreasing religious expression due to secularizing pressures. Unruh, Sinha, and Belcher (2010a)

find volunteering for mainline Protestant agencies serves as an important part of religious expression, although the lack of overt proselytizing signals to some that religion is unimportant. A strong religious identity allows for the blurring of religious and secular distinctions facilitating utilization of secular practices in programs and management. Rather than blindly imposing values on others, staff at 22 FBOs reveal a practice of living faith which connects spiritual nurturing with social activism (Tangenberg, 2004). This expression of religion is used to connect through relationships which are unanimously described as approached with dignity, respect, compassion, empathy, hospitality, and unconditional positive regard. Embodying religion in daily activities maintains the organizations' identities since 15 of the interviewees noted the inclusion of overt religious content in service delivery as inappropriate while only four took the opposite view. Similarly, Vanderwoerd (2004) finds nonnegotiable values reinforced by the active expression of religion as justification to seek relationships outside their religions in two organizations.

Maintaining connections within a network of coreligionists helps maintain religious identity of organizations. Religious communities maintain connections with their FBOs in different ways (Schneider, 2013, this issue, Schneider et al., 2009; Schneider, Wittberg, Unruh, Sinha, & Belcher, 2011). These religious communities feel an obligation to ensure that the organizations follow the specified practical theology and stewardship strategies. As part of this wider project, Sinha (2010) finds that African American organizations maintain connections through overlapping leadership roles with churches and separate 501(c)(3) organizations. Federated organizations for Catholics and Jews maintain their identity with similar evolutions. Both Catholic Charities and United Jewish Communities are umbrella organizations to coordinate fundraising and programs within their religious communities. As described by Brilliant and Young (2004), these organizations grew to identify themselves first as a community problem solver which could stay true to religious beliefs and secondarily as a fiscal intermediary and economic regulator. Reflecting the active relationship between congregations and FBOs, inspiration through religious identity does not always flow to an independent FBO from a founding sponsor. Wittberg (2000) provides examples of organizations which change their religious sponsors in fundamental ways. Using examples of Catholic orders and their operation of schools, hospitals, and orphanages, the calling of social service becomes the orders' very reason for being. Similar examples in Protestant denominations indicate that some religiously based colleges fundamentally shape sponsoring denominations. The operation of schools, hospitals, and orphanages becomes so dominant to the organization that they become the primary outlet of the religious expression. These separate organizations also become important tools for member recruitment and training of leaders. Wittberg (2012) finds positive and negative effects of umbrellas on component FBOs and religious communities. On the positive side, the training, recruiting, collaboration, and planning help maintain religious identity, especially if the sponsoring religious community is in decline or the original founder leaves the organization. However, the bureaucratic procedures, size, and geographic remoteness of an umbrella may serve to temper enthusiasm for a component local organization's mission.

Some organizations retreat from their religious identity in the face of government and market forces. Secularization of the mission statement of the Los Angeles Catholic Charities' Immigration and Refugee Services contributes to employees viewing themselves as an extension of the county government (Bruce, 2006). In a detailed study of one FBO in Philadelphia, Goode (2006) finds deemphasis of the organization's religious identity through a shift in mission, composition of participants, and management structure in order to access stable funding and to recruit more volunteers. Craig (2008) observes similar market-driven changes in an examination of Catholic and Jewish hospital organizations where consumer-driven health care and the self-interest of physicians influence the mission orientation of FBOs. In a parallel fashion, four AIDS organizations in New York retreated from religion while honoring their religious roots (Chambré, 2001). To attract funding and public recognition two organizations became secular while two shifted to an individualized form of religion for participants. Two years of planning resulted in dissolution of Oasis Housing Corporation because of difficulties transitioning from a faith-based, volunteer-driven organization to a professionalized organization pushed by government regulation (Adkins & Kemper, 2006). Critically, Oasis lacked the needed relationships within the system of influential institutions and people required to provide their services.

Secularization is not a new phenomenon. As nonchurch social service agencies emerged in greater numbers in the early 20th century, a trend toward secularization was noted in nominally Christian organizations. At the end of the 19th century when the Social Gospel was most broadly professed, concerns began to be aired and remained part of the dialogue about secularized organizations taking over the activities traditionally maintained by the churches (Mathews, 1924). The Social Gospel movement was led by progressive Protestants who applied liberal Christian ethics to prevailing social problems to underline social justice concerns of inequality and poor living conditions. It is noted these organizations did not profess religion and lacked the active theology or other elements typical of churches. Hall (1994) discusses how the Social Service Department of the Mormon Relief Society deemphasized religion during the Depression. Social work cases assumed from the Red Cross and other agencies which involved Mormon families required rapid expansion accompanied by professionalization. The controversial migration of this agency from its heritage of education and religious training to social work resulted in replacing older volunteers with paid staff. These changes and other leadership initiatives reduced the importance of spirituality in service delivery. This was influenced partly by increasing cooperation with other community agencies as well as the government.

Whether an organization maintains its religious identity or becomes more secular, underlying values "once institutionalized, have acquired a taken-for-granted status and are unlikely to be altered unless changing circumstances lead people to question them" (Hall, 2005, p. 59). Hall argues that various religiously motivated actors founded civic associations and organizations which allowed normal citizens to become moral agents who could do good as they viewed it. This could be in the effort of providing social services in an effort to obtain converts or as a way to express their own morality and prepare themselves for sanctification before God. Therefore, once values are

institutionalized, even if the organization becomes secularized, the moral grounding of the organization often does not shift from the original moral principles.

Government funding and market forces are powerful secularizing forces. However, some organizations maintain their religious identity despite these forces. Sinha (2013) finds that more than half of the organizations accepting funds through the government's faith-based initiative use multiple means to actively preserve and not change religious identity, especially through recruiting coreligionists for board and staff positions. Hutchison (1998) describes how the secularizing influence of partnerships with government and commercial entities can be managed through the articulation of a religion that sees individuals in the context of their community. One excellent example of this sort of organization is Habitat for Humanity. As studied by Baggett (2001), this FBO adeptly navigates the secular world with an underlying religious ethic as it builds houses for those who could not otherwise achieve home ownership. Habitat emphasizes relationships between volunteers and recipients through the home-building process. Government funding is only accepted for neighborhood infrastructure development and not for building the homes themselves.

Different Religious Traditions

Religious traditions have substantial influence on social service provision. An organization's founding religion provides an identity reflecting the way the religion views service and this outlook usually stays with the organization. As discussed previously, maintaining this identity requires ongoing management. However, the founding principles for FBOs differ depending on the sponsoring religion. This includes Christian faiths as well as Jewish and Muslim religions. In some cases, religious identity remains clearly evident while in other cases it is not kept at the forefront. In many cases, religious bodies establish FBOs as a competitive response to other service providers with the assumption that their religion needs to add something particular to the community. Schneider et al. (2011) found that "all faith communities feel responsible for ensuring that their current practical theology was followed by their FBOs" (p. 409). Ways in which this is implemented is to provide or withhold resources as well as be actively involved through participation and networking between religious communities and their FBOs. Differences between religions can be stark including the motivating force of religion behind service, importance of religious identity in service provision, and interactions of FBOs with wider society.

Since our country's colonization by Europeans, Protestantism inspired the creation of numerous churches and FBOs in sufficient numbers to be considered a key driver of civil society. Given the importance of cooperating with different groups in a new world, interfaith cooperation was necessary to effectively solve common problems. The practical theology which evolved had two strands: first is charity to care for the poor and second is transforming systemic roots of poverty and injustice. Implementation of these fundamental ideals is "fulfilled through a complex mixture of individual action, projects by the local corporate church body, and initiatives within a denominational or ecumenical structure" (Unruh, Sinha, & Belcher, 2010b, p. 6). This

underlying commonality in theology resulted in substantial similarities among Protestant faiths in the implementation of social service ministries. This is reflected in close ties between congregations and FBOs, with pastors often directing their congregations to supply board members, material resources, and volunteers to independently managed FBOs. While the foundation of these FBOs is rooted in religion, forces of this world take over in the implementation and concerns revolve around practical needs rather than theological principles (Schneider et al., 2011). These include at least 450 colleges, about 1,100 evangelical television and radio stations, 70 publishers, along with broad representation in social services (Hunter, 1985).

Catholics established systems for education, social services, and hospitals in the 19th and early 20th century to preserve their religious traditions and prevent members of their religion from exposure to the Protestant dominated government and faith-based systems, creating what is now one of the largest faith-based systems in the United States. Hehir (2000) cites figures of 1,115 hospitals and health care centers, 8,453 primary and secondary schools, and 1,400 Catholic Charities agencies. This tradition has ancient roots, with "Catholic involvement in healing and helping the poor. . . goes back literally to the founding of Christianity" while "[e]ducation as a spiritual task came somewhat later" (Schneider et al., 2011, p. 417). Originally established in the United States to serve recent immigrants and instill Catholic values, these organizations evolved to collaboratively serve mostly non-Catholic clients as well as being a training ground for Catholic lay leaders (Cochran, 1999). Collaboration is strong with the government since these organizations grew "because of help from government funding, such as federally funded tuition for World War II veterans in Catholic higher education, government funds for the construction of hospitals, [and] government-provided fee-for-service arrangements with Catholic Charities" (Curran, 1997, p. 91).

Managing organizations subject to government regulation and serving increasingly diverse populations while maintaining a consistent, distinctive Catholic identity is a constant challenge. Cochran, Curran, and Hehir all concur that there is fundamental agreement in principles on social thought and ministry. However, paradoxical forces create tensions which inhibit their full and consistent expression. Hehir (2000) concludes that subsidiarity, the concept of service provision provided first by the most local-level institutions like FBOs, but sometimes with government financial aid, is a freedom-enhancing method of meeting and satisfying basic needs which resolves some tension between religious and secular forces. Leadership at the parish level for primary and secondary education and diocesan control of Catholic Charities ensure that the local religious bodies with most understanding of local conditions maintain authority for key institutions. As Wittberg (2013, this issue) notes, hospitals were originally under the auspices of orders of nuns, but most now have national management due to many mergers and acquisitions as well as the federal dominance of policy affecting hospitals.

Higher education institutions struggle with academic independence and interference of bishops, most pointedly over teachers of theology (Curran, 1997). Leaders of Catholic universities note that communicating mission, a constraining but enriching process, is a defining part of their identity (Feldner, 2006). For Catholic institutions of

higher learning, Janosik (1999) developed a framework of external influences, internal influences of governance, and internal influences of the curriculum for the delineation of Catholic identity. Being funded mostly by government reimbursement as well as heavily regulated at the federal and state level, hospitals must contend with secular technological approaches in which modern medicine saves lives without providing for the spiritual needs of the patient (Cochran, 1999).

Lutherans fall between Catholics and other Protestant faiths in their approach to social service which focuses on the act of caring rather than improving social justice or working toward the salvation or religious expression of the actor. The Lutheran underlying principle of directing service to benefit a neighbor in need as a genuine good work—and rejoicing at the alleviation of suffering regardless of the motivation of the donor—can be traced back to Martin Luther. This detachment of religion and good works from the actor's standpoint helps Lutheran organizations flexibly adapt to external public demands and respond to market forces. These practical forces interact with a religion active in love for neighbors that places the emphasis on serving other people. One organization, the Lutheran Services Agencies, maintains its identity through carefully managing a balance between conservative and moderate interests. As outlined by Gumz (2008), the organization stresses an affirmation of Lutheran religious values and goals through the activities of its component parts as it attempts to meet economic needs as well as serve as a forum for services which should be provided. In profiling the merger of two child services organizations, Thiemann (2005) concludes the religious founding of these social ministries remained the strongest facet of their identity which "stressed the importance of charity, love for neighbor, and *noblesse oblige*, often to the detriment of larger considerations of social justice" (p. 207).

The evolution of Jewish organizations from serving and employing mostly Jews to including Gentiles is viewed not as a decline in the *Jewishness* of these organizations (Ellenson, 2006). Instead, the services provided at institutions such as hospitals and senior citizen centers fulfill the highest standards of Jewish religious tradition. Assimilation of Jews increased dramatically in the last century, creating different demographics and community needs. Provision of charitable services to non-Jews is viewed as holy based on God's instructions to Abraham as well as the articulation of law by Maimonides. This kindness and justice provided to Gentiles is known as *Kiddush Hashem*, the sanctification of the divine name in the universe. Two other key concepts underlying Jewish theology of justice and charity are *tikkun olam*, healing the world, and *tzedakah*, which reflects charity, justice, and righteous duty. While synagogues and temples operate relatively independently, "Jewish social welfare, health, community development, and, to a large degree, educational initiatives are organized communally" (Schneider et al., 2011, p. 419). This involves overcoming theological differences within the Jewish religion and organizing to reinforce the common ethnic heritage as well as religious commonalities. Coordinated planning for funding and developing "education and social supports are seen as the responsibility of the entire community, with a heavy emphasis on community-wide planning and collaboration across agencies" (Schneider, 2010, p. 71). These efforts aid in the creation and development of leadership, maintaining Jewish identity, and managing relationships in an

interfaith world. Some of this leadership development includes a sophisticated system to educate Jewish FBO professionals through the Jewish Communal Service graduate programs and various publications such as the *Journal of Jewish Communal Service*. This reinforcement of religion through professionalization is contrary to the impact of professionalization in other religion, which tends to have a secularizing impact.

Muslim FBOs have important internal and external influences. Service and charity are fundamental to Islam as reflected by principles of *zakat* (obligatory charity) and *sadaqa* (voluntary charity). The religious obligation to serve the needy is profiled in the establishment of the first Muslim medical clinics in the United States (Laird & Cadge, 2010). This profile revealed not only the religious motives for obligatorily serving others, but also the importance of positive image of American Muslims as compassionate and generous as they serve the needy to wider society. Values expressed by Muslims are religious even if the organization provides nonreligious services (Yaghi, 2009). In a survey received from over 400 constituents and over 200 board members of 28 Muslim organizations, the influence of religious beliefs, the Quran, religious authorities and humanitarian values far outweighed secular influences of advisors, reports from academics or other religions, and observation of client needs in decision making. This behavior was described as intentional and characteristic of the leadership of these American Muslim nonprofits.

Like Catholic and Jewish immigrant groups before them, today's Muslim FBOs seek to maintain religious and cultural identity in the face of potential assimilation into the American culture. Bauer and Chivakos (2010) discuss a Muslim FBO refugee resettlement program in Hartford, Connecticut which did not effectively engage other FBOs involved with refugees such as Catholic Charities and Jewish Family Services. When serving clients, divisions were made along sectarian as well as racial lines which reinforced a Muslim identity first, with other aspects of identity and assimilation to American culture subsidiary to religion.

Doing Research on Faith-Based Organizations

Given that research on FBOs was lacking until the upswing precipitated by Charitable Choice, it is not surprising that there was a good deal of concern about how FBOs should be studied in the literature we reviewed. Topics covered included general methodological issues, the analysis of faith-based service programs, and how a variety of specific methodological approaches might be used.

General Methodological Issues

A number of works considered the methodology of studying religion and religion's role in society and social programs. For example, how should spirituality be studied? Stoltzfus (2007) notes that in the study of spirituality, researchers often attempt to isolate its effects from biological, social, and psychological processes which may produce similar effects. This, however, is incompatible with notions that spirit, mind, and body are interrelated parts of a whole person. Research needs to confront his dualism.

Progress will call for reconciliation between the conflicting paradigms represented by the method of study (positivism) and the object (spirituality). He advocated mixed-methods approaches, such as using grounded theory based qualitative studies to help researchers to understand the lived experience of the study's participants. The constructs identified by such studies could then be used in the design quantitative studies with larger samples.

Another question is whether there is distinctly Christian research. Speaking of Christianity in general, McNamara, Cuffey, Cherian, and Paulose (2008) note that Christian research will entail a concern for how results will serve a larger faith-related purpose, such as benefiting practitioners in the role they play in engaging the world. This mindset, however, is likely to differ sharply from those of academics seeking abstract knowledge. Therefore, researchers and practitioners need to identify shared interests regarding the generation of knowledge. In this, it is important for academic researchers to understand that FBOs may have distinct values regarding knowledge creation and the use of information.

On the issue of religion's role in society, Nagel (2006) noted that welfare reform linked religion more closely to societal and political transformation. This gives researchers the opportunity to study religion's role in modern industrial societies. Research on the macro level should examine the interaction of religious and other welfare institutions. On the micro level, it should examine the exchange of resources: who receives which kind of material or nonmaterial goods, from whom, and to which ends? For example can faith-based providers be more effective because they provide access to privileged networks? How can these networks themselves profit from this situation?

On the level of specific programs, DeJong and Horn (2008) note that religion in the context of program service delivery requires new ways to measure its effect on social service delivery models. It is necessary to understand what religion means and how it is applied in social service programs. This requires identifying the type of religious components delivered, how much of this component was received, and the mode of delivery. A program's religious elements and the manner in which they are communicated are referred to as *programmatic faith*. Programmatic religion can be a measurable component of a service, with its own measures of activities and related outcomes. They identify three distinct measures of programmatic faith: the centrality of spirituality within a program, the manner in which a program communicates its religious content to those it serves, and the type and frequency of faith-related program elements matched to a particular religious tradition. Selecting ways to measure a program's faith-related components requires an intimate knowledge of the program's religious framework. Valid measures will reflect the meaning and intended effect of each of the program's components, which originate in the organization's system of beliefs and results in program choices.

Other works discuss a variety of research challenges. For example, Reese (2000) considers issues in sampling, access, and operationalization and measurement. For random sampling, a list of population elements is required. This can be problematic in that most lists used to compile databases are incomplete or dated. Additional questions

concern the unit of analysis. Should central administrative denominational offices be included in addition to service-providing locations? Should coalitions of faith-based institutions be included? Access can be an issue. Respondents may be too busy or they may not be interested in or comfortable talking to researchers. For example, ministers may be uncomfortable with the racial and gender characteristics of the interviewers. In addition, operationalization may encounter difficulties in identifying the types of benefits provided. For example, if a day care center provides opportunities for unemployed mothers to get training to enter the job market, is it also providing economic development? In addition, institutional resources or capacities for programs and activities could be operationalized using size, income, number of clergy, and number of staff. From a methodological standpoint, all these measures can prove problematic.

Chaves (2002) also discusses a variety of research and data issues. As was reviewed above, there are many ways an organization may be considered religious. This confronts the researcher with a variety of different typologies and dimensions which could be used, which is problematic for the accumulation of consistent findings. In addition, data on the operations of FBOs is lacking for a number of reasons, including the reticence of the government to collect data due to concerns about the separation of church and state, nonprofit scholars not considering religious organizations a priority research area, and the sociology of religion's focus on the individual level of analysis. Research is needed on comparisons between religious and secular organizations in a variety of functional areas. Also, research needs to address the complexity of key independent variables and the mechanisms underlying observed religious effects.

Evaluation of Faith-Based Services

The majority of works about methodology concerned techniques to evaluate the operations and outcomes of faith-based social service programs. A special issue of the *Journal of Religion & Spirituality in Social Work* was devoted to this (Volume 25, Numbers 3/4, 2006; later republished as Boddie & Cnaan, 2006). In that publication, Boddie and Cnaan (2006) recommended the general approach of applying social science methods to measure the extent of religious components in a particular program and to track participant exposure to these components. Outcome evaluation could then be used to link religious components to client change (see also Fagan, Horn, Edwards, Woods, & Caprara, 2007; Fischer, 2004). In addition, Grettenberger, Bartkowski, and Smith (2006) advocate the use of secular comparison groups to help isolate the effect of religious components. According to Thyer (2006), research should assess whether clients receiving the program show initial improvement and, in addition, show greater initial improvement along three variables: relative to those who did not receive the program, relative to those receiving a placebo, and relative to standard care. Also, do positive results endure? Finally, is the intervention effective across a diverse range of clients, and effective when applied in everyday practice settings?

A number of research designs to carry out this agenda have been discussed. Zanis and Cnaan (2006) describe how randomized clinical controlled trials could be used to study faith-based interventions and provide a model for drug and alcohol programs.

Fischer and Stelter (2006) propose a number of ways that the requirements of these designs could be relaxed or tailored to faith-based programs. These include designs without no-service control groups and designs combining random and nonrandom elements. Other research designs include comparative case studies (Grettenberger, Bartkowski, & Smith, 2006), participatory research (Sinha, 2006) and using local networks as the primary unit of analysis (Campbell & Glunt, 2006).

However, Janzen and Wiebe (2010) maintain that the challenge is to develop evaluations that meet the standards of social science while respecting the centrality of religion inherent in interventions. For example, Harden (2006) cites the need to develop faith-based program theory in order to capture the complex nature of phenomena in religious programs. The faith factor, once identified, must be decomposed into its active and manageable components for research to be useful for program design (von-Furstenberg, 2006). For this step, researchers should model, test, and validate in detail how the faith factor arises and works. He advises that microsimulation could be used to model the effectiveness of alternative program designs and suggest the outcomes to be expected. These could then be compared to actual results. Netting, O'Connor, and Yancey (2006) propose the use of grounded theory design and methods in order to identify the specific beliefs and interpretations that are presumed to be the key to program success.

Authors also address a number of other complications in studies of faith-based programs. Grettenberger, Bartkowski, and Smith (2006) caution that selection bias may result in some faith-based programs containing primarily religious clients. They also recommend that future research should recruit larger and more representative samples of clients and take steps to limit the high attrition or loss of study participants during the course of a study. Bielefeld (2006) described research difficulties in longitudinal designs. In a study where services were funded by state contracts, the state changed funding priorities during the course of the study. In response, providers changed programs or stopped providing services, making posttests problematic.

Other Research Approaches

A number of additional research approaches have been utilized to study FBOs. These include anthropological, historical, and action research approaches. Kemper (2006) noted that while traditional anthropological inquiry contributed to the study of religious symbolism, a gap existed in the anthropological consideration of FBOs. Several compilations addressed this gap. A special issue of *Urban Anthropology* (Volume 35, Number 2-3; Summer-Fall, 2006) was devoted to faith-based community organizations. In this issue, authors examined FBOs and the material lives of the impoverished (Hill, 2006), political activism (Goode, 2006), and planning (Adkins & Kemper, 2006).

In addition, anthropological approaches were used by the authors in *Not by Faith Alone: Social Services, Social Justice, and Faith Based Organizations in the United States* (Adkins, Occhipinti, & Hefferan, 2010). The book sought to illustrate the importance and utility of ethnographic approaches for understanding the role of FBOs

across the spectrum of social service delivery in the United States. Several of the contributions to this volume have been reviewed above (Baur & Chivakos, 2010; Laird & Cadge, 2010). Other chapters examined the details of faith-based involvement in a number of social welfare programs, including a public school–FBO partnership in South Philadelphia (Mundell, 2010), the role of African American spirituality in social reform and community change in South Memphis (Lambert-Pennington & Pfromm, 2010), a faith-based community development organization's redevelopment project in Rockford, Illinois (Fitzgerald, 2010), and a faith-based drug recovery program in California prisons (Rodriquez, 2010).

In addition to the above, anthropological approaches have been used by a number of other researchers. Social capital was explored by Schneider (1999) through case studies of three Quaker-based social service organizations engaged in work in disadvantaged communities. Bartkowski and Regis (2003b) used in-depth interviews and fieldwork in Mississippi to examine how religious conviction and racial dynamics shape congregational benevolence in 30 congregations in Mississippi. Woodrick (2006) used a variety of methods to describe the key role that the pastor of a Lutheran church played in the establishment of a Latino community in Marshalltown, Iowa. Using congregational data and first-hand participation, Kemper and Adkins (2006) describe several patterns of the congruence between congregations and their communities.

Finally, the Faith and Organizations project used an ethnographic approach to study connections between congregations and their FBOs. Findings from this study are described in the *Maintaining religious identity* section above and several articles in this issue. What is noteworthy here is the study's multimethod ethnographic design and comparative examination of a number of organizations (see Schneider et al., 2009). The study utilized the histories of the relationships between religious communities and specific selected organizations, in-depth interviews with current and former key individuals from the religious community and organizations, participant observation in religious community stewardship activities and selected organization events, and analysis of recent and ongoing written material.

Historical and action research approaches have also been used. A number of books have been written on the history of major religious organizations. General histories of Catholic Charities have been provided by O'Grady (1930) and Gavin (1962). Brown and McKeown (1997) examine Catholic Charities and American welfare. Huggins (1971) considered poverty and Boston Charities around the turn of the 19th century. The Salvation Army and urban reform was the topic of Diane Winston's book (2000) and Robertson (2007) wrote about race, gender, and the YWCA. More recently, Newman (2006) identified the important themes of religion, entrepreneurship, and family in the history of philanthropy in Atlanta. He describes how the activities of FBOs in Atlanta have been influenced by and are interrelated with the agendas of local social entrepreneurs and the philanthropy of Atlanta families.

Crist, Parsons, Warner-Robbins, Mullins, & Espinosa (2009) used an *action research* approach with two vulnerable populations. Action research involves key community stakeholders in developing knowledge and taking action to solve problems. In one case, the action researcher worked with the community to identify and

interpret Mexican American families' underuse of home care services and collaborated to design interventions. In the second case, the action researcher worked with formerly incarcerated women in a community faith-based program to design priority interventions for comprehensive wraparound services following incarceration.

Each these other research approaches can provide different and nuanced information that should be used to augment the findings of quantitative and evaluation-based research in order to enhance our understanding of FBOs.

Conclusion

In this first of two articles, we introduced the scope of our review, presented the overall findings of our literature scan, and discussed the literature on the religious characteristics of FBOs and methodological considerations raised in conjunction with research on FBOs.

When we examined the pattern of publications, we were struck by its correspondence to the debates and controversies surrounding welfare reform and proposals for government to support the service provision activities of FBOs. Publications rose sharply as the debate intensified in the mid-1990s and dropped off almost as sharply as the policy issue waned. While this may be a typical pattern for research associated with policy issues and may lead one to question the enduring value of such research, our review shows that a great deal was learned about the characteristics and activities of FBOs. This countered the neglect of this topic in the past and may well provide a basis for those interested in FBOs for both policy and nonpolicy questions.

To help better understand the characteristics of FBOs, scholars developed numerous typologies categorizing FBOs and their expression of religion. These typologies illustrate the importance of understanding the nuances in the importance of religion to FBOs. Variation is found in organizational control, expression of religion, and program implementation. The development of these typologies provides a valuable resource for future scholars attempting to understand the impact of religion on the nonprofit sector, especially social service delivery. While no single typology is uniformly accepted, the variety of categorizations provide ample basis for continuing discussion about the role of religion in FBOs and other organizations providing social services. Government organizations are uniformly secular, while for-profit and nonprofit organizations may show distinct religious orientation with varying intensity. Many FBOs find it challenging to maintain a religious identity often because the requirements of government contracts or simply meeting financial needs are powerful influences toward secularization of FBOs. However, a focus on mission counteracts this trend by attracting volunteers, staff, and clients motivated by the religious tradition to the organization. This focus on mission narrows the range of services provided by FBOs, a topic we elaborate on in our second article.

A number of methodological issues have been raised in the literature. Fundamental considerations include the appropriateness of using a positivistic methodology to study aspects of religion, both from the standpoint of the validity of the research results as well as the most appropriate role of the researcher himself or herself. Methodological

considerations also lie at the heart of the policy debate, as questions about whether or not government should support FBOs revolve in one degree or another around what types of services FBOs provide and how their service provision differs from (and may be superior to) that of non-FBOs. Besides the usual challenges of evaluation methodologies, the role of faith or religious tradition in various aspects of organizational behavior and their support system has been a central concern. Proponents of government support to FBOs have usually posited that the *faith factor* is the distinguishing feature between FBO and non-FBO providers and the reason for FBO success. This faith factor proved difficult to identify and evaluate and work remains to be done on this central issue. On this topic, detailed ethnographic studies may hold the most promise in the near future.

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1. This database, compiled by The Lake Institute for Faith & Giving at the School of Philanthropy at Indiana University—Purdue University in Indianapolis (http://www.philanthropy.iupui.edu/Lakefamilyinstitute/), includes a broad selection of over 2,600 items regarding faith and giving.
2. These journals include *Nonprofit and Voluntary Sector Quarterly, Nonprofit Management & Leadership, Journal of Religion & Spirituality in Social Work: Social Thought, Research on Social Work Practice, Social Work & Christianity, and Social Work*.

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