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IGNATIAN SPIRITUALITY
AND LEADERSHIP
IN ORGANIZATIONS TODAY

Half a millennium ago, Ignatius was not cognizant of certain terms considered nowadays as fundamental in organizational leadership: such concepts as transformational leadership, empowerment, organigrams, organizational culture and learning organizations. Yet, judged by his writings, he seems to have had an intuitive grasp of these and other ideas in the way he applied them to govern an organization like the Society of Jesus.

Ignatian spirituality has often been approached from the individual and group point of view but rarely from a corporate or organizational perspective. How, and to what extent the principles, concepts and processes of organizational leadership applicable to today's organizations can be found already, at least implicitly, in Ignatius' vision of a religious institution?

This article intends to study those characteristics found in today's organizational leadership literature and practice and their corresponding traces both in St Ignatius' writings and in his role as organizational leader. Some of these characteristics are clearly and directly related to Ignatian principles. Others are less familiar and not so applicable to his "way of proceeding". On the other hand, there are elements of leadership in Ignatius' intuitions not yet taken up in today's secular leadership or management. Finally, a few characteristics still need to be developed both in organizational leadership today and in Ignatian leadership. The sequence of this article follows these four types of characteristics.

Preliminary Considerations

In reviewing the history of leadership research and practice, we have witnessed recently a shift in perspective. A shift from vertical to horizontal structures, from a command-and-control hierarchy to an empowerment strategy, from centralization to decentralisation of authority, from clarity, certainty and predictability to chaos, doubt and the unpredictable.

Vertical structures are making room to accommodate the lateral, informal, and inherently horizontal networking. The command-and-control hierarchy required front-line employees to follow and the CEO to lead. Everyone in between led those below and followed those above. Leading meant making decisions and providing direction; following meant obeying. Authority and accountability are now decentralized so that the organization becomes a collection of small, interchangeable units working toward a common goal. The future is uncertain for current and potential leaders. Never in history has so much change occurred so fast in our organizations. In today's fast moving organizations, rules cannot replace thinking, meetings cannot replace doing, and processes cannot replace responsibility.

While there are certain similarities between religious and secular (business, educational, civil, political) organizations in terms of characteristics common to both, important differences, nevertheless, do exist. Both may have similar structures as to concepts, similar dynamics as to processes and similar development as to stages. Yet, the content and the thrust of these common elements may vary considerably. Radical differences between business organizations and religious institutions are also found in the latter's "transcendent" aspect, the goals pursued, value priorities, the development of their original charism, and the motivation of their members. In the case of religious life, members live together and make a life-long commitment. These differences point to specific roles and functions of religious leadership.

Shared Vision/Mission

In a recent book edited by Hesselbein et al. (1996) titled "The leader of the future", a group of well renowned leaders and executives expressed what they considered to be the main qualities a future leader ought to have. The one which was practically mentioned by all was that of sharing a common goal, mission, vision or direction.

It remains a fundamental role of any leader to guide members towards a shared vision and to help them achieve the corresponding goals. It is normal to expect that vision and direction come from the top of the

organization. But that vision has to percolate down the pyramid to reach all employees. This "visionary" leadership implies providing a specific mission which is communicated clearly to members as a source of inspiration and motivation to commit themselves to action. It is also interesting to note how the concept of a *"mission statement"* has become a motto for today's organizations.

In his biography of St Ignatius, Jesuit William Meissner (1992) indicates how Ignatius was truly a master of visionary leadership. In reading the Constitutions one is struck by Ignatius' constant reference to mission as a continuous criterion. The phrase "according to our mission" is often repeated. Just as in an organization its goals and specific orientation determine its structures and tasks, so for Ignatius it is in function precisely of our mission that government structures in the Society are established, decisions by superiors are made, apostolic discernment is guided, candidates for the Society are examined, and the type of formation is chosen. Furthermore, Ignatius expects Jesuits to share his own spiritual vision by internalising the directives he expounded in the Constitutions.

Leadership Models

Until the sixties, the various leadership or management models attempted to answer the question "which is the best leadership style?" Then in the late sixties, both researchers and practitioners began to realise that there is no such thing as a best leadership style applicable to every situation and to all circumstances. In 1967, Fiedler developed the familiar "contingency theory of leadership" where he argues that particular styles of leadership are only effective in particular kinds of situations. In the late seventies, Hersey and Blanchard (1977) elaborated on the Contingency Model and made it more specific through their famous theory of "Situational Leadership".

In reading the Constitutions one is impressed by the repetitive insistence of Ignatius to add at the end of a declaration the phrase "according to the subjects, places, conditions and times." When giving guidelines to Superiors about criteria for making decisions, he felt the need to add similar phrases. Concerned about being misinterpreted as enunciating absolute or eternal truths regarding ways of proceeding, Ignatius allows for great flexibility in respecting contingencies inherent in reality.

In the early eighties, Burns' concept of transformational leadership began to develop. This expanded the focus of leadership beyond task-and-relations-orientation as found in previous models. Transformational leadership is the set of abilities that allow the leader to recognize the need

for change, to create a vision to guide that change, and to execute that change effectively. Transformational leadership is based on the principle of "mutual stimulation and elevation" and includes four interrelated components: charismatic, inspirational, intellectually stimulating, and individually considerate.

Ignatius' insight into the need for change in his times prompted him to take action by bringing together a group of dedicated men ready to commit themselves for Christ's Kingdom. His original vision to guide that change was eventually translated into founding a new religious order, the Society of Jesus. And to ensure the concrete and effective implementation of that change, he wrote the Constitutions elaborating details on governance in the Society. Throughout this whole process which inspired so many followers, he did not waver from his personal concern for each individual. Ignatian spirituality offers a spiritual model for leaders on how to become agents of change in today' world and an effective way of proceeding to achieve that goal.

Organizational Culture

The concept of organisational culture was promoted in the mid-eighties by organisational psychologist Edgar Schein in his book "Organizational Culture and Leadership" (1985). It includes a company philosophy, a set of key values and belief systems, members' attitudes and behaviours, their shared norms and assumptions, and the whole atmosphere experienced within an organization. This corporate culture is like the character or personality of an organization. The importance of an organizational culture is widely acknowledged today since it gives members a sense of company identity and generates among its members a commitment to particular values and ways of doing things. As a result, members feel more integrated within the company and develop better relations among themselves and with their bosses.

The Spiritual Exercises of St Ignatius already provide a sound and solid foundation on which to build a corporate culture for the Society. At least, they represent the spirit underlying that culture. Then in the Constitutions Ignatius supplies a body to that spirit. In reality, we cannot separate our Jesuit spirituality from the Society's organisational culture. Ignatius' favourite phrase "our way of proceeding" captures succinctly what our "company culture" consists of. That phrase even goes beyond our Jesuit culture because it is more than a written code of values and norms. It is the way we live our vocation and mission as Jesuits. It is by internalising and owning our Constitutions that we actually create our corporate culture in the Society in the way Ignatius expects us to. That, also, is the whole

purpose of the formation process. And that process is ongoing and lifelong.

Empowerment

Empowerment has become one of the most popular "buzz words" in organizations today. It is being applied to education, parenting, management and leadership. The concept of employee empowerment can now be found in almost every modern textbook on management. Empowerment may be defined as the process of enabling people to set their own goals, make decisions, and solve problems within their sphere of responsibility and authority. As such, it includes previous leadership practices like motivation, participation, delegation, and autonomous decision-making.

Ultimately, the long-term role of a good leader is to empower people. Empowerment is not limited to sharing information with employees but also sharing in decision-making and responsibility. If those empowered are not ready to handle the new power given, then the leader must create conditions

in which the followers can receive the training, coaching and feedback necessary to take their responsibility.

Without knowing this leadership concept, Ignatius practiced empowerment in his governing style. He trusted his men and willingly delegating authority to those directly involved in the apostolic works. Through his example and personal accompaniment he prepared and formed his followers to assume important leadership responsibilities. In the Constitutions, he describes the role of Provincials as sharing in the General's governing responsibilities and similarly for superiors at lower levels. This empowerment reaches even the level of the cook to whom power is given to manage his area of responsibility with those assigned to help in the kitchen. Ignatius himself, but also in his writing the constitutions, was careful in the choice of personnel to make sure that they are well equipped to be empowered. Similarly, the formation of Jesuits should be such that they achieve spiritual and human readiness to assume responsibilities and be receptive to empowerment.

Accountability

Empowerment, as opposed to the historic command structure, does not do away with accountability. But the difference is that empowered people can accomplish more for the organization than ordered-about people ever could. Empowerment implies accompanying the conferring of responsibility

with delegating the corresponding authority. Otherwise, responsibility without authority leads to frustration. However, accountability has to be added to responsibility and authority as a basic ingredient to ensure effective leadership. There is vertical accountability at various levels between leaders in organisations and their employees, and horizontal accountability among the employees themselves within each level.

Ignatius takes accountability seriously into consideration and gives concrete norms about governance in the Society. In part IX of the Constitutions and in the Complementary Norms, the system of account-ability is clearly spelled out at the various levels – individual, community, province or region, and the whole Society. Thus, the individual Jesuit's accountability to his local community superior or Director of works, that of the superior to the provincial, and the provincial to the General. Even the General himself is accountable to the General Congregation as his superior. Besides this vertical accountability there is also a certain type of horizontal accountability in the Society. In part VIII, union in the Society, members are exhorted to live the union of mind and heart, including through fraternal correction.

At the structural level, lately the Society has developed horizontal structures of authority. These have already been operative for some time now, particularly at intermediate levels between the provincial and the general level through Conferences of Major Superiors. Such structures have been found to be effective in promoting inter-provincial collaboration and has created a sense of solidarity and accountability among provincials themselves.

Globalisation

The phenomenon of globalisation is profoundly changing the way today's organizations are perceived and operate. Leaders are responsible today to determine how their companies fit into a global context. Living in a global village makes us aware of the international dimension of our organizations. The challenge facing today's firms and their executives is that of being attentive to global homogeneity where things become the same and global heterogeneity where cultural differences are to be respected. The global perspective of today's organizations is forcing them to adapt their authority structures, decision-making processes and operating procedures. Perhaps the adage "think globally, act locally" should rather become "think and act both globally and locally".

The genius Ignatius already in his time had a global perspective when founding the Society of Jesus. His vision was that of an international apostolic organisation to respond to the call of the King. The universality

dimension was very present in his mind when formulating the criteria for the choice of ministries. For him "the more universal the good is, the more is it divine" (Const. 622d) This universality as an apostolic priority was precisely the reason for placing Jesuits at the disposition of the Supreme Pontiff who is in a position to regard the universal needs of the Church and of the world.

Training and Development

For quite some time, the training and development of employees in organizations was not given sufficient attention. Gradually, certain organizations began to realise that training of personnel was a necessity, not a luxury. So they invested money, time and energy in providing intensive training for their members at all levels. The result was having an effect not only on the quantity of their productivity but also on the quality of their performance. More important, the employees became more motivated and felt the company showed care and concern for them. Nowadays, it is a cliché to say that training is important for an organization to develop its human resource potential. If training is expensive, non-training is even more expensive.

We are all familiar with the seriousness of our formation as Jesuits. Ignatius dedicated long sections in the Constitutions on how a candidate admitted to the Society should be formed. Especially in his time, he was aware of the lack of sufficient preparation and formation given to priests. For Ignatius, formation is seen as a preparation for mission and hence it should be geared towards fostering apostolic effectiveness both individually for each Jesuit and collectively for the whole Society. Compared to the amount and type of training being given today in secular organizations, we should be proud as Jesuits on the quality of formation we receive in the Society. Just as a good leader in an organization gives importance to the continuous training and development of personnel, so in the Society we know that for superiors formation is a priority and hence they give special attention to those in formation.

Leadership vs Management

The two roles of management and leadership have often been assumed to be synonymous when in fact they are two distinct executive functions. Not all leaders are managers and not all managers are leaders. The managerial role has evolved mostly in response to organizational needs for stability, rationality, systematisation and power distribution. Leadership denotes another type of characteristic behaviour like risk-taking, personal

power, inspiration, and so on. Managers give attention on how things get done in contrast to the leaders' focus on what the events and decisions mean to participants. John Kotter (1996) of the Harvard Business School maintains that leaders create vision, shared values and strategy by keeping their eyes on the horizon, while managers organize, control and plan by keeping their eyes on the bottom line.

The famous expert on leadership, Stephen Covey (1991) states that leadership deals with vision, with keeping the mission in sight, and with effectiveness (doing the right things). Management deals with establishing structures and systems to get results, focusing on efficiency (doing things right). Accordingly, his suggestion is "Manage from the left brain, lead from the right brain."

According to this distinction, was Ignatius a leader or a manager? Clearly, the answer is that he was both. For he certainly practiced both leadership and management roles. He had a vision, a direction, a mission, an objective to promote in view of apostolic effectiveness. At the same time, he presented efficient strategies, means and methods, structures and resources adapted to attain the intended goals. Besides, in describing the qualities of a superior in the Society, he mentions qualities or characteristics that require both leadership and managerial skills. However, the leadership qualities are given more importance than the managerial ones. That is still true in the tradition of the Society today in the choice of superiors. When the management skills are lacking in a superior, his assistants (socius, minister, treasurer etc.) can make up for that lacuna.

As regards Covey's advice "manage from the left brain, lead from the right brain," Ignatius had already understood that idea. At times we make decisions based on rationality, logic, analysis and argument (left brain) and at other times through intuition, imagination, creativity, "feelings" (right brain). Ignatius in fact applied these two ways of mind processing to spiritual discernment. While combining these two approaches in searching for God's will, he seemed to give preference to the right brain activity. Thus, in proposing the three moments for making a discernment, he suggests as a second moment the process based on the experience of spiritual consolation and desolation ("subjective" criteria, more like right brain). Then as a third moment he resorts to left brain processes ("objective" criteria), a moment of tranquillity when one can consider reasons in favour and against the various options: putting oneself in the role of counsellor to someone else, imagining being at the moment of death, picturing oneself in judgment day. Applying all this to apostolic discernment on the part of superiors, this would mean that in that process the superior exercises both a leadership and a managerial role.

Communication

Much has been written on communication and, needless to say, its fundamental importance is here to stay. The new leader or manager is the person who builds trusting relationships through effective communication. The issue today is how to make it more effective by choosing and improving the appropriate medium without compromising the value of personal communication. While appreciating and using modern technology, we should not undermine the importance of personal relationships.

In the time of Ignatius it was not so easy for the first Jesuits to communicate with each other, the means of communication being so limited in speed and efficiency. Yet he still insisted on his followers to stay in touch by sharing information and experiences. He explicitly mentioned this point in the Constitutions as a special means for the union of minds and hearts: "Another very special help will be communication by letter between subjects and superiors, and their learning frequently about one another and hearing the news and reports which come from the various regions" (Part VIII8, 673). This type of communication, however, was not considered as a substitute for face-to-face conversation, something which Ignatius encouraged both in our apostolate and among ourselves. The "cura personarum" of the superior towards his subjects remains a central aspect of the superior's function.

Organizational Structures

An organigram or an organizational chart represents an organization's authority structure, roles, communication networks and decision-making processes. It also reflects, therefore, an organization's management style and culture. In creating new organizational structures, today, there is a shift from vertical to horizontal structures based on work processes rather than departmental functions. Boundaries between departments are thereby reduced or eliminated.

Nowadays, companies are breaking down traditional boundaries to create lean, adaptive and flexible organizations. Horizontal networks and inter-functional teams which cut across boundaries are taking their place alongside, and sometimes even replacing, functional, hierarchical organizational structures. The trend is therefore to break down the bureaucracy and the pyramidal levels in the organization in order to allow the flatter, network-driven organization to emerge.

The way Ignatius envisaged the Society of Jesus incorporated a government structure as outlined in the Constitutions which catered for the

exercise of proper authority, with roles at the various levels well-defined, and decision-making processes established. That Ignatian heritage is still observed today among Jesuits. However, the hierarchical, pyramidal or vertical structure is still very present.

The question is: if Ignatius were to be living in our day, with the knowledge of contemporary trends in management, would he have conceived a more flexible structure for the Society allowing for more horizontal governing structures and networks? Before answering this question, we must realize that hierarchy as understood by the Society is not mainly a question of power, control, supervision or discipline though it also includes these. The hierarchical structures are not intended to replace the members' inner freedom, motivation and commitment. Nor do they suppress initiative, creativity or incentives for new projects. The real test for fidelity to our charism is to be found in an authentic discernment.

Organizational Metaphors

In his now classic book "Images of Organization", Gareth Morgan describes various developing metaphors or images to depict the nature of an organization. He lists the following: organizations as machines, as organisms, as brains, as cultures, as political systems, as psychic prisons, as flux and transformation, and as instruments of domination. Obviously, the metaphor chosen reflects one's understanding of an organization and its management.

What would be Ignatius' metaphor for the Society of Jesus he founded? Some authors and spiritual writers have wrongly interpreted him to adopt a military model, given his pre-conversion background. Some concepts he uses may lead one to think that, for example, general, order, strategy, chains of command, the summons of an earthly king in the Exercises, etc. As a matter of fact Ignatius takes up the organic metaphor, that of the body which he uses throughout the whole of the Constitutions. St Paul and the Church today also adopted that image of the mystical body.

Again, if Ignatius were living in our era which witnessed the development of new images for organizations, would he perhaps have also adopted one of the metaphors mentioned by Morgan, or more creatively he would have invented a new one?

The Learning Organization

In today's environment, leaders and managers are redesigning their companies to what is being termed as "learning organization". Instead of aiming at efficient performance, importance is given to knowledge and

information. In the learning organizations, skills are developed in acquiring, transferring, and building knowledge which enables the organization to continuously experiment, improve, and increase its capability. All employees are involved in identifying and solving problems.

As a result, organizations today are in the process of shifting from a training to a learning orientation. Thus, training is seen as a way of organizing learning processes at work rather than as traditional formal training away from work. In other words, a learning environment is created at the workplace itself. Examples of learning arrangements at the workplace are work-related learning projects, coaching, reflection-in-action, mentoring, self-study and learning-by-doing.

This new concept could perhaps be applied to Ignatian or Jesuit spirituality in the way our apostolate is conducted. To what extent do we create and develop apostolic projects that serve at the same time as a learning experience for us? Is our ongoing formation limited to sabbaticals, attending courses, making the long retreat, reading books and articles, spend time in a third world country, etc. or are we also constantly and regularly forming ourselves through the way we evaluate our apostolate and practice discernment?

Servant Leadership

Robert Greenleaf was the originator of this notion and applied it to business and educational institutions. For servant leaders, leadership is not a rank, privileges, title or money. It is a responsibility toward service. They do not ask "What do I want" but "What needs to be done?" Thus, servant leaders are givers, not takers. They never hold on to a position or title. They listen and learn from those they lead. They make themselves available. They are out and about talking and listening to people at all levels of the organization. And servant leaders want to serve only until a successor is identified and ready, not one moment longer. So, serving and supporting, rather than commanding and controlling, are the watchwords for the new leaders.

Ignatian spirituality is a spirituality of service. Already in the Principle and Foundation of the Exercises Ignatius states that we are created to *serve* God our Lord. For Ignatius, love is expressed in service. In our intentions and decisions or choices we are expected to seek what is more expedient for the divine *service*. Secular organizational leaders may not be concerned primarily with service, seeing in it spiritual or religious connotations. But certainly in the mind of Ignatius, Jesuits should seek to exercise their apostolic leadership by serving their fellow men and women. This has continued throughout the tradition of the Society and encapsulated in

Arrupe's famous dictum "Men for Others"

Democracy

While the so-called democratic style of leadership has served companies and countries well because of its advantages over other systems, we are becoming increasingly aware of its considerable deficiencies. Choosing a leader for having obtained a numerical majority in a group does not guarantee that the best choice was made. Experience at group, organizational and national level of elections has conveyed that message. On the other hand, the alternative to this type of democracy is neither autocracy nor anarchy.

So when we insist that the Society, like the Church, is not a democracy, that does not exclude forms of active participation and consultation in the process of choosing a leader. Such a process, in fact, is what is being done in the Society by involving all concerned in a personal and communal discernment process. This is happening in the choice of Director of Works or local superior, and in the choice of a new provincial and his consultors. The results appear to be quite positive.

In the case of the General, who in the mind of Ignatius has lot of power and authority in the Society, he is the only one who is technically elected and not appointed. The General is elected by representatives from all the provinces, most of whom were elected as delegates for their province. But even the General is not like a king with absolute power and with no superior because the General Congregation is even above the General. This electoral system may perhaps be applied to the choice of leadership in secular organizations.

Related to this notion of democracy is another Ignatian characteristic which is not much practiced in today's leadership in organizations. It is that of representing to superiors one's thoughts which go contrary to an order received (Const.627 I). It is within Ignatian spirituality to share with one's superior a personal discernment process which has led to a decision different from the superior's. In secular organizations this could be misunderstood as undermining the leader's authority.

Leadership as Plural

This idea is something which is neither found in today's organizations nor in the Ignatian concept of leadership. Leadership cannot remain the prerogative of one single person. It has to become plural, team-based, collegial. Leaders of the future will have to involve others and elicit their participation, because tasks will be too complex and information too widely

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distributed for leaders to solve problems on their own. Such leaders will share power and control according to people's knowledge and skills, in order to permit and encourage leadership to flourish throughout the organization. In an increasingly interdependent world, leadership must be created through relationships more than through individual results. In the case of the Society today, perhaps this is a new concept which may be applied to develop a type of co-leadership with our lay partners. Having said all this, it is still understandable that in

certain governing structures it might be more feasible to have one person on top for greater effectiveness.

Creativity

The rapidly accelerating rate of change taking place is creating new types of organizations never imagined before. And changing organizations require changed leadership. This in turn requires creative leaders, capable of inventing new and original ways of seeing reality, creating new energy and life into the organization. Effective leaders have the vision required to see things differently from others. In order to be creative, the future leader may have to become proactive and not just reactive, an agent of change, not only incremental but especially transformational change. This demands a new and different way of dealing with issues and problems which go against the traditional, stereotype ways.

Our challenge in the Society today is to imbibe Master Ignatius' creativity and apply it to our current situation. We would be practicing "creative fidelity" to our founder if we could imagine what changes he would make in the Society were he alive with us today and then to implement those creative changes.

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