

INTRODUCTION - INPUT

INTRODUCTION

We enter the domain where leadership meets organisational management, administration and governance. These areas can seem secondary to leadership work or a dry topic far from what is truly important, but we should not be fooled, they are core in our role as leaders called to life in organisations. Institutions are amongst *“the other things on the face of the earth created for human beings in order to help them pursue the end for which they are created.”* The effective leader understands the value of institutions, the challenges they face and their purpose.

MAIN IDEAS

Imagine a leader without the knowledge of how the finances in his/her unit or organisation work, or without the skills to build a strategic plan, or without the capacity to deal with change in the organisation/unit. We would probably say he or she is not a good leader. The reflection about the importance of managing organisations (or units for middle line managers) is quite straightforward.

In this module you will go through the main elements of organisational structure and organisational behaviour. We will look into the main elements that constitute almost any type of institution (like organisational departments and their functions) and we will continue engaging in practical exercises that will expand our capacity as leaders. There will be suggested resources to deepen on the areas that require more attention on your part. Concretely, in this module we will focus on the following themes:

- **Discernment in Common:** The module starts with discernment in common as a key resource (or better said “attitude”) for the following sections. You will be presented a process for communal discernment that you can implement in your organisation/unit.
- **Decision Making:** Decision making has some overlapping concepts with discernment in common. However, this section is more focused on the biases we have as individuals when making decisions.
- **Mission, Vision, and Values:** These are key elements before engaging in any strategic planning process and, are therefore, previous to it. You will learn about the differences between these concepts and review your mission, vision statements, and the values promoted by your institution.
- **Strategic Planning:** Having a strong well thought-out apostolic plan to help your organisation/unit fulfill its mission is essential. This section will invite you to start a plan and help you with the process.

- **Marketing:** In this section you will undergo a process of understanding who you are really serving, from the corporate point of view we would talk about your target groups. You will be reviewing what services you are currently providing them, this includes understanding their needs and desires, the 4P's, segmentation, and other interesting ideas.
- **Financial Management:** Our relation to the financial resources of our organisation and the way we manage them was a key concern for Saint Ignatius. You should understand what this means for your institution/unit and have plan for it as well.
- **Human Resource Management:** This is the organisational perspective of managing people. It involves the process of selection (planning, selection, recruitment), formation (induction, training, recognition, and rewarding), dismissing (termination and transition).
- **Organisation:** In this section you will revise the different existing organisational configurations and you will connect with the one that best suits your institution. Understanding how your organisation is organised (or how it should be), will help you better understand the inner mechanics and how you can better perform through it.
- **Organisational Context:** There are many different courses on leadership around the world but many fail to account for contingency variables, specific situational factors that greatly influence the results of the organisation. This section will study these factors.
- **Organisational Culture:** In this section we try to dissect the beliefs, shared values, assumptions, and other such factors of our unit/organisation. We provide a simple model easy to remember and invite individuals to reflect on the reality they face in their institutions.
- **Change Management:** The final section is a reflection on how change occurs in institutions. This will be useful to promote the changes you are looking for in your organisation or at least to anticipate possible challenges that might appear during periods of change.

Organisational sustainability and Organisational Agility

Two key elements that we need to have in mind during this module are the ideas of sustainable organisations and agile organisations. These two concepts will continuously be referred to during the following sections.

When talking about organisational **sustainability** we refer not only to internal but also external sustainability. This means, how do we maintain our institution working over the pass of time (see the Ignatian note) and how do we do it in a way that also sustains the environment in which it is embedded (see [CSR](#) concept for the latter).

According to Aaron de Smet from McKinsey, **agility** is the ability of an organization to renew itself, adapt, change quickly, and succeed in a rapidly changing, ambiguous, turbulent environment (see VUCA). Agility is not incompatible with stability —quite the contrary. Agility needs two things. One is a dynamic capability, the ability to move fast—speed, nimbleness, responsiveness. And agility requires stability, a stable foundation—a platform, if you will—of things that don’t change. You are invited to take the [organisational agility assessment](#) we have developed from the insights developed by McKinsey & Co, or take the [online assessment](#) on the Agility Quotient from Bain & Co.

IGNATIAN NOTE

The following Ignatian note is a summary of a text from the book “Liderazgo Ignaciano” by Fr. José Maria Guibert. Ignatius did not speak about “sustainability” but rather about “preservation” (Conservar and *conservatio*). In part X of the Constitutions he asks “everything that God has done for us, will it be sustainable in the future? how can we help it to be?”

Fr. Guibert takes from *Part X of the Constitutions - How the whole body of the Society is to be preserved and increased in its well-being [812-827]* a list of ten commandments Ignatius mentioned for the preservation and increase of the institutions:

1. **Hope:** “Therefore in him alone must be placed the hope that he will preserve and carry forward what he deigned to begin” [812]. God created the Society of Jesus through Ignatius and the First Fathers so in God himself depends the sustainability of the institution. If God has moved a series of individuals before, He has to continue doing so. We should not forget that behind all our efforts to improve and be sustainable we have to see the hand of God. In more lay terms, we should invite people to trust life, in the goodness of people.
2. **Interiority:** “In conformity with this hope, the first and most appropriate means will be the prayers” [812] ... “the natural means which equip the human instrument of God our Lord to deal with his fellow human beings will all help toward the preservation and growth of this whole body.” [814]. If someone prays for something, this becomes part of oneself. If one prays for an organisation and its people, that organisation and those people become part of oneself. Together with prayer Ignatius mentions “kindness, virtue, charity, pure intention, sincere zeal” as the natural means that have as instruments of God to help our neighbours.
3. **Competencies:** “For these interior gifts are necessary to make those exterior means efficacious for the end which is being sought.” [813] We have already looked into the interior gifts in the previous point. The exterior means are “well-grounded and solid learning, and a method of proposing it to the people by means of sermons, lectures, and the art of dealing and conversing with others” [814]. These competencies have their relevance, but, as he suggested, from a hierarchy: the interior moves the exterior, if the interior fails, the exterior will be probably used incorrectly.
4. **Structures:** “In a similar manner, it will help greatly to maintain the colleges” [815] Institutions are a complication and a burden but they make possible a greater and steadier service. The sustainability, not only economical, of an institution makes possible the durability of the apostolate.

5. **Austerity:** *“It will be highly important for the preservation and growth of this whole body that every appearance of avarice should be banished afar.”* Ignatius was clear about it. Thinking in religious orders, poverty *“preserves them in their existence and good order and defends them from many enemies, and since the devil uses corresponding effort to destroy this bulwark in one way or another”* [816]. Therefore, institutions are invited to austerly use their resources.
6. **Humility:** Ignatius had especial sensibility towards situations in which someone wanted to climb to or really desired positions in a disordinate manner. *“It will also be of the highest importance toward perpetuating the Society’s well-being to use great diligence in precluding from it ambition, the mother of all evils in any community or congregation.”* [817] He regularly promotes humility and service.
7. **Selection:** *“Much aid is given toward perpetuating the well-being of this whole body by [...] not admitting a mob and persons unsuitable for our Institute, even to probation, and about dismissals during the time of probation when it is found that some persons do not turn out to be suitable. Much less ought those to be retained who are addicted to vice or are”.* What Ignatius and any leader wants are *“persons who are select in spirit and learning, and who after prolonged and extensive activity have become well known through various trials of virtue and abnegation, with edification and satisfaction to all”.* The reason is clear: *“This is done so that, even though numbers grow, the spirit may not be diminished or weakened, with those incorporated into the Society being such as has been described.”* [819]
8. **Union:** *“Whatever helps toward the union of the members of this Society among themselves and with their head will also help much toward preserving the well-being of the Society. This is especially the case with the bond of wills, which is the mutual charity and love they have for one another.”* Ignatius was also interested in something that nowadays produces a lot of complaints: Internal communication. *“This bond is strengthened by their getting information and news from one another and having much intercommunication”* [821]
9. **Flexibility:** Saint Ignatius can seem very strict sometimes, but then is asks for moderation in work: *“Moderation in spiritual and bodily labors and the middle tenor of the Constitutions, which do not lean toward an extreme of rigor or toward excessive laxity (and thus they can be better observed), will help this whole body to persevere and maintain itself in its well-being.”* [822]
10. **External Relations:** The last point to emphasized is the indication of not being generous with those inside our institution and selfish towards those outside: *“Toward the same purpose it is helpful in general to strive to retain the goodwill and charity of all, even of those outside the Society” ... “there should neither be partiality to one side or another among Christian princes or rulers nor should any be perceived; in its stead there should be a universal love which embraces in our Lord all parties (even though they are adversaries to one another).”* [823]

EXPECTED LEARNINGS AND OUTCOMES

1. Familiarising yourself with the framework for this module
2. Understanding the importance of sustainable and agile organisations

“I won’t belong to any organisation that would have me as a member”

Groucho Marx