

INTRODUCTION

"Leadership is not a state, it's a journey"
Leonard D. Schaeffer¹

You are going to embark on a path to self-discovery and personal development, a path that many others have walked before and in which they have learned more about themselves, about their relationship to others, and their relationship to God. Just as on any other journey, we can go forwards or backwards, we can get lost, we sometimes encounter obstacles and sometimes places to rest. It is a path where we sometimes go alone and on foot² or accompanied by others; where we learn about life and about ourselves.

Before we begin we need to learn something about the journey. Just as a pilgrim prepares a backpack according to the kind of trip he or she is going to make, in the same way we need to prepare by taking stock of some important aspects of this learning journey before we embark on it.

This introduction is divided into three parts:

1. Preparing for the Journey
2. The Way of Proceeding
3. The Fruits of the Journey

¹ Schaeffer, L. (2002), *The Leadership Journey*, Harvard Business Review

² To get in touch with the Ignatian tradition, you are invited to read Fr. Brian Grogan's SJ book, *Alone and on Foot* (2009) <http://amzn.to/2C4nYS6>, a summary of Saint Ignatius of Loyola's life and an adaptation of Fr. José Ignacio Tellechea Idigoras's, *Ignacio, solo y a pie* (1986) <http://bit.ly/2ys4h4l>

Preparing for the Journey

Starting from the Purpose

Before setting out on any journey or beginning a new project, you might want to take 5 minutes to consider the reasons why you are doing it. Leadership for what?³ What end do you want to reach?⁴ And why? Take a minute to write down your thoughts about your intentions and hopes.⁵

Ignatian spirituality invites you to clarify constantly the intentions with which you do things⁶. It might be mere curiosity. You might want to improve how you lead others. Or you might want to achieve better results in your institution. Or again, your reasons might be more anthropological as you seek to understand yourself and others better. Or, quite simply, you may have been asked to do this. You may not even know the real motive as to why you are starting this journey... Whatever your reasons or apprehensions might be, taking the time to be aware of your starting motivation will help focus your efforts. This does not mean that during this journey your intentions might not change but having some inkling about what you desire to achieve from the start will help you recognize how you are gradually developing.

Beyond the Leadership 'Buzz'

'Leadership' is a word we hear frequently, whether positively or negatively. It is actually a very recent term. Saint Ignatius never

³ The Jesuit Province of Loyola issued a document in 2013 on leadership. The Province posed some interesting questions to help you to reflect on the topic of leadership before starting out on the journey, e.g. Why are you reflecting on leadership? What is "your" story? What life plans do you have? What are you looking for? How did you arrive at this leadership task? Who entrusted you with this mission?

⁴ Under the subheading "The Spirit behind Our Plan of Studies" (*Iuxta Spiritum Rationis Studiorum*), Włodimir Ledóchowski SJ affirmed that the ultimate end of Jesuit education is to help students know and love God more deeply.

⁵ You might want to start your own leadership diary at this point

⁶ Guibert, J.M (2017) *El liderazgo ignaciano*. Cantabria, España: Editorial Sal Terrae

used the term "leadership" in his writings and, in many languages, it still does not have a precise translation.

What is your personal relationship to the word or concept of 'leadership'? The way you relate to this concept is important for the journey ahead. Your answer might be on a spectrum that goes from a firm belief that leadership is the solution to all your problems to a complete disbelief in the entire leadership debate.

Although interest in leadership has been growing throughout the past century, there is still no agreed-upon definition of the concept. Often, it is quite personal. Empirical research has demonstrated that how leadership is viewed and the status and influence given to leaders vary considerably across cultures.⁷ Some cultures tend to glorify the concept of leadership and consider it is quite acceptable to discuss it in the context of both the political and organizational spheres. Other cultures, may have clearly different views and may be even sceptical about the value of leadership. Even the word "leader" is defined differently across various groups and, therefore, carries assumptions that affect the essence of leadership and the expectations as to how it should be exercised.⁸ In some settings, terms like "leader" and "manager" carry a profound stigma, whereas in other settings these words denote strength or dignity.

Building Capacity for the Mission

The whole point of studying leadership is to answer the question, "what is good leadership?"

**Philosopher and ethicist,
Joanne Ciulla**

⁷ Refer to The Global Leadership and Organizational Behavioral Effectiveness Research Program (GLOBE) - Cultural Influences on Leadership and Development, Project GLOBE. Advances in Global Leadership, Volume 1, pages 171-233. Also refer to the work of House, Wright, & Aditya, 1997.

⁸ Allan David Walker, Leader Development Across Cultures, 2006, Journal of Research on Leadership Education

Bearing in mind the multitude of theories and interpretations associated with the word 'leadership', we attempt in the following section to put this concept in context; to emphasize the intentionality of leadership development and to highlight the values underlying it.

We believe that growing in leadership is a process to serve a higher purpose and not an objective in itself. It is the result of engaging in a journey that helps us grow in our own humanity. We refer here to the journey of becoming "men and women for others and with others" (Kolvenbach 2008, p. 260).⁹ So, what matters is not "leadership" in itself, but to what extent the process allows us and the people we meet in the journey to live more abundantly and to help our institutions fulfill their final purpose.

The ultimate purpose behind this learning journey, as we see it, is to be in relationship, to communicate, to mobilize teams and other stakeholders and to build and structure our institutions ***in service of our higher purpose***. Put simply, leadership development is at its core personal development with practical tools that help us fulfil together the mission entrusted to us¹⁰.

Keeping an open disposition

*"It is very profitable for the exercitant to begin the Exercises in a magnanimous spirit and with great generosity"*¹¹. With these words, Saint Ignatius invites us to begin the Spiritual Exercises (one of the foundational documents of the Society of Jesus). In turn, Saint Augustine reminded us that *"it is no advantage to be near the light if the eyes are closed"*¹².

⁹ Lozano, J. M. (2016). Leadership: The Being Component. Can the Spiritual Exercises of Saint Ignatius Contribute to the Debate on Business Education?, DOI 10.1007/s10551-016-3117-7, *Journal Business Ethics*, published online.

¹⁰ See Ex. 23 - *"The other things on the face of the earth are created for human beings in order to help them pursue the end for which they are created"*

¹¹ SE [5]

¹² Saint Augustine of Hippo, excerpt from Josiah Hotchkiss Gilbert's, *Dictionary of Burning Words of Brilliant Writers* (1895) (p. 607)

It is amazing how many times we can see or hear something and, in reality, we are not receiving it the right way.¹³ Learning requires that we keep an open disposition all throughout this journey: remaining open to making mistakes and learning from them; open to being hurt; open to getting lost; open to receiving both the gifts and limitations of others and allowing them to impact us. This might come as a surprise to those who see leadership development as a process to control mistakes and pain or to avoid them altogether. This is not our approach. As our world is getting more complicated, leadership demands that we become comfortable with being uncomfortable. Growing our capacities to respond to these new challenges rests on our internal disposition to welcome and manage this discomfort and learn from it. You will, therefore, benefit from this manual and the learning journey you are about to start to the extent that you develop your receptiveness to new experiences and insights.

While it is natural that in the face of uncertainty, we resort to previous experiences to help us move forward, leadership often demands admitting our not knowing in a spirit of openness and innocence.¹⁴ For the sake of this journey, we are called to be open, surprised by the wonders and joys that the learning generates, as well as the insight and wisdom that come from learning through failure and hardship.

Gathering the necessary resources for the way

“Therefore I tell you, do not worry about your life, what you will eat or drink; or about your body, what you will wear. Is not life more than food, and the body more than clothes? Look at the birds of the air; they do not sow or reap or store away in barns, and yet your heavenly Father feeds them.” (Mt 6,25). Although in Matthew’s Gospel we are invited not to worry about what we take with us for

¹³ Iriberry, J.L. & Lowney C. (2015) *El Camino Ignaciano*. Bilbao, España: Ediciones Mensajero

¹⁴ Ronald Heifetz and Marty Linsky, “Sacred Heart”, excerpt from *Leadership on the Line*, chapter 11

the journey, there are some useful resources that might help us along the way and that it is best to be aware of.

This is a leadership manual from an Ignatian perspective. Therefore, we will be making many references to Ignatian sources. We will mainly draw insights from the Constitutions of the Society of Jesus, the Spiritual Exercises, the Autobiography of Saint Ignatius, his personal letters, his Spiritual Diary, as well as the writings of several Superior-Generals of the Society of Jesus such as: Fr. Claudio Acquaviva SJ; Fr. Pedro Arrupe SJ; Fr. Hans-Peter Kolvenbach SJ; Fr. Adolfo Nicolás SJ and Fr. Arturo Sosa SJ, amongst others¹⁵. There are also many worthwhile resources from individual Jesuits and partners in mission (lay men and women inspired by the teachings of Saint Ignatius) that have immense value for this purpose and which will be also shared throughout the manual.

In addition, there will also be references to resources from the academic and corporate environments developed by different experts in the field. We will find resources from Ronald Heifetz, Henry Mintzberg, Otto Scharmer, Leonard Schaeffer, Bill Torbert, Daniel Goleman, amongst many others.

The Roadmap: what the manual is and what it is not

Although it is impossible to determine everything that we might encounter along the way, the following lines are useful to consider:

This manual is a support for the journey. Leadership development, just like personal development¹⁶, is a continuous process of improvement. We invite you to take this manual as an additional resource for your journey to become a better person, a better leader, and to live life more abundantly. The hope is that at

¹⁵ See list of Generals of the Society of Jesus - Link

¹⁶ "Leadership development is first and foremost personal development, meaning that we need to go about developing the whole person". Muff et al. (201). *Management Education for the World: A Vision for Business Schools Serving People and the Planet*. Edward Elgar Publishing. (p. 83)

the end of this manual you will find the inspiration and energy to continue with this journey on your own.

This manual does not cover everything. There are countless theories and books on management and leadership and if we add the ones that exist on the topics of faith and spirituality we could easily double or triple that number. Summarising and putting everything into one manual is not possible. This manual offers a compilation of leadership and developmental theories that were chosen as helpful instruments for the sake of the programme.

Leadership from an Ignatian approach not “the Next Ignatian Leadership Theory”. In the book “the Nature of Leadership”, David D. Day and John Antonakis did an excellent research on the history of leadership and its different schools of thought from the early 1900’s until today. One of the schools that has received much attention in the last years is the ‘New Leadership’ school which contains theories such as the ‘neo-charismatic leader’; ‘the visionary leader; and ‘the transformational leader’ amongst others. We are aware of the risk of expanding the aforementioned list by using the terminology “Ignatian Leadership”. We feel adjectives like these ones can easily limit the understanding of what leadership really is. We see leadership as a discipline of its own that can be enriched by the Ignatian tradition and spirituality. . This approach focuses on a more holistic view of the person and the person’s self-transcendence¹⁷; it offers a way of doing things that makes sense in a competitive world, that can move things forward in a sustainable way because it is built on a fundamental respect for persons, for dialogue and that pushes always towards the frontiers.¹⁸

The manual does not provide pre-cooked answers to your problems. We recognize that there is a tendency today to blame every personal and organisational problem on a lack of leadership. This approach can promote leadership development as a

¹⁷ San Juan, K. (2012). Leadership and Ignatian Spirituality: Formation Capacities and Dispositions in a Complex World and SE [21]

¹⁸ Dardis, J. (2016). Water in the Desert

one-size-fits-all solution. But, just as attending an EMBA¹⁹ is not going to solve all your workplace problems²⁰, this manual is not going to make leadership problems disappear like magic. But the manual will give you tools to enable you to deepen your understanding of yourself, of your job, of your relationship to your team, of your institution, and of the purpose you are serving. To use the title of one of Ron Heifetz's books, this manual also is about *Leadership Without Easy Answers*. Furthermore, this manual is not a substitute for the *Spiritual Exercises* or any kind of support you might receive from professionals such as coaches, spiritual directors or psychologists.

This manual is not an academic paper; it gathers knowledge from academic sources. As already stated, there is a great deal of research in this area. What this manual offers is a more practical approach. It is based on existing theories and much of the research available in academic articles and books in order to offer a set of practical recommendations useful for your day-to-day life.

The way of proceeding²¹

Rooted in our own reality and in relationship with others

In the *Spiritual Exercises*, Saint Ignatius wrote that the Exercises are to be adapted to the capabilities of those who want to engage in them, i.e. age, education or intelligence are to be taken into consideration.²² This is the same case for this manual. We are aware that our starting points will be different. Middle-level managers have different concerns and needs than top managers; school directors have different concerns and needs than retreat-house directors, and young Jesuits have different concerns and needs than senior partners in mission.

¹⁹ Executive Master in Business Administration

²⁰ Mintzberg, H (2005). *Managers not MBAs*. Berrett-Koehler Publishers

²¹ Not to be confused with the Ignatian "way of proceeding". In this context, we mean: how we will be making this journey.

²² SE [18]

For this reason, this manual is designed with a **modular approach**, meaning that the different modules and sections can be used separately. It will be left to the discretion of the reader and/or the facilitator giving the course to determine what aspects of the manual should be used and which ones should be left aside according to each one's reality. Normally, there is an inherent value in using the manual as a whole and some aspects should be addressed before others. We might be tempted to start building the house from the roof down²³ and leave aside important things for the future; we need good judgement along the way to determine what should come first, what later, and what can be left aside.

It is recommended that at the beginning, middle and end of this journey the person connects with someone who knows them well and whom they trust in order to share ideas and discuss the progress made. This person can be a coach, mentor, friend, colleague, spiritual director, etc. This is especially important for those people using this manual individually.

Taking into consideration the wider context

One of the many good recommendations included in the *Constitutions of the Society of Jesus* is to **take into account circumstances of times, places, persons, and other such factors**.²⁴ Saint Ignatius was aware of the speed with which the Society of Jesus was expanding and starting works in locations all over the world. Needless to say, Ignatius wanted Jesuits and lay collaborators to be sensitive to the different realities in our world, to perceive them and to adapt to them. Benedetto de Goes, Matteo Ricci and Christopher Clavius²⁵ are three examples of Jesuits who shared a similar formation and yet they were able to adapt to

²³ Spanish expression (empezar la casa por el tejado) that means "beginning from the end"

²⁴ Const. [64] [66] [70] [71] [136] [211] [238] [343] [351] [455] [458] [462] [746]

²⁵ Lowney, C. (2003) *Heroic Leadership: best practices from a 450-year-old company that changed the world*. United States of America. Loyola Press. To be fair with the hindsight of history, Lowney writes that Benedetto de Goes died a failure.

different realities and contexts each in their own way. This manual invites you to follow this rich tradition.

This manual read by different people, or the same course given in a different context and for a different cohort will generate an outcome that is specific and unique to that setting and group in question. Unfortunately, a written document like this manual cannot completely capture the unique fruits and synergies that take place in a given time, in a given place, and with a given number of people. However, this also has a beauty to it - we are invited to make our own journey and learn from it instead of simply repeating other people's experiences.

Comparing ourselves slavishly to others' experiences will seldom be beneficial. We do not want to make the exact journey as Saint Ignatius, Pedro Arrupe or Matteo Ricci. What we desire is to be inspired by their example.

Tensions and traps throughout the journey

“The fibers of all things have their tension and are strained like the strings of an instrument”.

Henry David Thoreau

Tensions are part of our everyday life and will definitely be part of this journey. Healthy tensions and polarities are neither problems to solve, nor simply right versus wrong ways of acting. They are nuances that we are called to recognize and manage.²⁶

Ignatius' *Formula* expresses an inherent tension: “not only...but...”; this mentality of holding tensions together [...] is a distinctive characteristic of the Society. The harmonizing of this and all tensions [...] is not contained in abstract formulas but rather obtained over the course of time through that which Pierre Favre

²⁶ Arnold, T. (2017). *The Power of Healthy Tension*. Amherst, Mass., HRD Press Inc.

calls “our way of proceeding”.²⁷ Pope Francis here refers to the fact that we cannot eliminate these tensions; they are inherent in what we do. What we need to do is to hold them in balance so that with time and experience we are able to harmonize them.

In this journey we will need to deal with all types of tensions²⁸ that can both hinder our progress or enrich it as we move along. We list here below some possible tensions:

- Balancing learning from the best practices of the business world while remaining authentic and genuine to the Ignatian tradition and to Christian values.
- Balancing theoretical inputs and instructional learning (seeking to learn by increasing our knowledge) with practical implementation and experiential dynamics (learning by doing and practicing).
- Balancing times for contemplation and reflection with the pressures of getting things done and moving forward through action.
- Balancing simplicity and striving for the *Magis*.
- Balancing our need to structure and plan our learning journey while remaining fluid, adaptive to what is arising and leaving spaces for God to work.
- Balancing the focus on individual needs and the growth and development of the person with the attention to group needs and collective progress.
- Balancing our focus on tasks versus our focus on people and relationships.
- Balancing keeping in mind the end goal while appreciating what surrounds us and the richnesses of each of the steps taken. For it is not walking many kilometres, but realising and relishing things interiorly, that contents and satisfies

²⁷ Pope Francis. (2016). Discourse of the Holy Father Francis to the Members of the 36th General Congregation of the Society of Jesus. <http://bit.ly/2AwZuEQ>

²⁸ This includes spiritual tensions as well (i.e. Own Salvation and the salvation of others; Community and Mission; Contemplation and Action, *cura personalis* and *cura apostolica*...)

the soul.²⁹

The journey ahead might carry other tensions that you will be called to recognize and manage yourself. Admitting our biases in the direction of one or other of these polarities might help us embrace the opposites and respond to them. When we fail to do so, we tend to fall into the trap of seeing a win-lose situation.

The Beatitudes delivered by Jesus on the mountain-top, have the character of a theophany and constitute one of the most beautiful pages of universal wisdom. They speak of a strange happiness that opens up in the midst of adversity and contradiction.³⁰ We will often find ourselves dealing with adversities and contradictions in our exercise of leadership - this is part of the job. It is the way we live with these tensions that will make all the difference.

The fruits of the journey

This learning journey will engage each one of us at various levels, and will carry fruits that will differ from one person to another depending on many factors.

The most obvious and clear learning outcomes are:

- Building practical leadership **knowledge** (through reading, presentations, theories and input, discussions, sharing with others...)
- Acquiring and practicing of **skills** relevant for our exercise of leadership, for our work in teams and organizations and for our mission (through engaging in exercises in the course or in between modules, application and experimentation in our workplace, and personal lives).

²⁹ Iriberry & Lowney, *óp. cit.*

³⁰ Meloni, *óp. cit.* (p. 49)

Other fruits can enrich the practical purpose of this learning journey:

- **Enriching the “being” component³¹:** Our development does not consist solely of theories, models, and frameworks (the “knowing component”) or skills, competences, and techniques (the “doing component”). As individuals called for leadership, we definitely need to display a certain level of competence and possess a given amount of knowledge, but it is our character (“the being component”) manifested through our values, beliefs and self-awareness that will strongly define how we exercise our leadership and live out our mission.
- **The Four Dimensions:** Father Kolvenbach (the 29th General Superior of the Society of Jesus) warned about focusing exclusively on the pragmatic elements of education as it can easily isolate this learning experience to a narrow academic perspective that overshadows other dimensions. In addition to the practical purpose of education (*Utilitas*), Father Kolvenbach (in reference to Father Ledesma) spoke about how Jesuit education is called to help individuals grow in a social-ethical dimension (*Iustitia*), in a humanistic dimension (*Humanitas*) and in a faith dimension (*Fides*).

³¹ See Lozano, J. M. (2016). Leadership: The Being Component. Can the Spiritual Exercises of Saint Ignatius Contribute to the Debate on Business Education?., DOI 10.1007/s10551-016-3117-7, Journal Business Ethics, published online