Ignatian Leadership in Context – Significance and Challenges

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In this article, I shall explore the relevance of the Ignatian Leadership in organizations today, the tensions and challenges involved, and preliminary ideas on how they may be addressed. By Ignatian Leadership, I am referring to the leadership approach that is based on Ignatian spirituality springing from the Spiritual Exercises[2] very well explained by Fr. Elton Fernandes, SJ in a separate article.

As an exploration, this article attempts more to suggest and stimulate ideas than to preach definitive "truths".   And because it is an exploration, I have ventured to include as the "context" not just Jesuit organizations, schools or NGOs but also others, such as commercial ones.   I do not pretend that Ignatian Leadership is equally applicable to different contexts.   It will be a stretch at time, and that is partly intended, because the points of tension are very often fertile grounds for increased understanding and new knowledge.

The Macro Trend

The advancement in technology[3] has had a huge impact on the nature of work and the workplace, with key implications for leadership. Work which can be replaced by machines and computers is disappearing, such as tasks which are repetitive, or which can be structured into well-defined parts and steps. With the latest development of Artificial Intelligence, it seems that even some of the very complex tasks for which sophisticated human perception and intellect are required

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[2] This contrasts with the defining characteristics of Jesuit leadership in Chris Lowney's book *Heroic Leadership*. Lowney based his thesis on a study of words and deeds of prominent Jesuits in history. Though he did mention Ignatian spirituality in some pages, it did not occupy a prominent place in his book. As a result, the correspondence between the characteristics summarized by Lowney and those identified by Fr. Fernandes is not obvious though some connections can still be traced if one looks closer.

[3] Each phase of technological development, from mechanization, to mass production, then automation, the internet and now Artificial Intelligence, has had a different effect on the economy and society.

may soon be done by computers if there are sufficient past data for the computer to "learn" from. The transformation is still ongoing.

In this evolving context, what are the types of jobs which cannot be easily replaced by machines and computers, and are thus considered "valuable"? Some possibilities include: jobs that require one to provide solutions to unstructured or even unpredictable problems; jobs that require judgment and decision under risks which are not entirely measurable; jobs that require creativity; jobs that require sensitivity towards people (the most complicated and unpredictable of creatures); and jobs that deal with the more profound questions in life: art, philosophy, meaning of life, religious faith.

For such jobs, a lot is expected from those providing solutions. They cannot simply implement detailed orders dictated by a leader who may know less than them about the complexity and subtlety of the situation, the feelings, thoughts, concerns, culture and values of the people involved, the inadequacy of past data in fully informing the future, the potentials for creative solutions based on both grasp of objective circumstances and invoking of subjective factors (feelings, values, beliefs, intuitions) as well as randomness. In professional services such as medicine, law, and education, the leader may not have the relevant expertise (even if they are in the same profession) that the frontline workers have in tackling the problems in question. The "ignorance" of the leader also makes traditional methods of monitoring difficult, as he or she cannot easily tell high quality work from low.

In the face of this trend, taking the team by the hand every step of the way no longer works for leaders. Not only do they need to allow, but they must actually encourage the team to take charge of the matter while they take the backseat. In other words, the evolving context of work needs team members who are willing and able to handle matters independently. This is quite different from what organizations need from workers in the era of mass production, such as in factories. In factory-type organizations, obedience, rather than independence, is valued as most workers play the role of a cogwheel in a rigidly structured machine. Now, some level of discipline is still expected but the scope of behavior allowed within the rules has widened greatly, and other qualities such as initiative, creativity, flexibility, adaptability and the ability to communicate and work with different types of people have increased in importance.

Relevance of Ignatian Leadership

In the Spiritual Exercises, the person who does the retreat (the "spiritual director") should try to facilitate rather than direct, lest he/she gets in the way of the direct interaction between the retreatant and God. If we apply this approach to leadership, then the leader is there to facilitate the work of team members by being their companion and mentor. He/she is not expected to micromanage by giving very detailed instructions. Instead, the leader provides the space for the team to work out in detail how the job should be done. Even if the team's approach or solution is not what the leader finds as the best one, he/she may still refrain from outright intervention. This is perhaps why Jesuits are often seen as rather "liberal" in how they teach and lead.

This approach to leadership addresses the evolving workplace in several ways.

Firstly, there will be greater ownership and initiative. The reason is that the Ignatian Leadership approach implies empowerment of the team to take greater charge of their work. In this way, the team feels that their contributions are being valued and that they are genuinely respected and trusted. They feel safe to take risks and the urge to have their own mark in the world through their work. Such are attributes important in the new context of work but regarded as dangerous in the age of mass production.

Secondly, it is a great way to develop the team for the new context of work. Given the need for local knowledge and expertise, the team has to be trained not so much through packaged courses which just provide "canned scenarios", as through accumulation of real-world experiences. The relatively "hands off" Ignatian approach to leadership allows the team to grow organically, albeit through more mistakes and with more time.   If the organization is providing people service, then the leader is also acting as a role model for his team on how they should treat their co-workers and clients. By being more inclusive, accommodating, flexible and understanding, the team can work better with their co-workers and caters better for individual needs of clients.

Thirdly, it enables the team to find meaning in their work and nurtures among them a sense of mission. The reason is that the team is given greater autonomy and the outcome of the work reflects their own decisions. By focusing directly on the needs of those served, rather than fulfilling expectations of the leader, the team will better appreciate that they are doing something useful, addressing real world needs. It is not "just a job", a mere means to an end. Rather, they see the connection between their job and their life purposes, and in this way, affirms their self-worth. In terms of motivation, it is intrinsic which is human and enduring.

With ownership, initiative, expertise borne out of rich and direct experience, fine grasp of subtlety of the context, intrinsic motivation, and even a sense of mission, the team, as nurtured and supported by Ignatian Leadership, will be well placed to tackle needs and issues arising out of the Macro-trend described in the last section.

So far, we have shown how leadership based on Ignatian Spirituality has unique relevance to the evolving context of work. However, there are organizational constraints.

Variations in Organizational Constraints

The differences in the context of each organization would have a bearing on the extent and approach that Ignatian Leadership is to be applied.

Firstly, we need to ask the question of whether the team is ready in term of their competence and their willingness towards taking greater charge of their work, with the leader being more "hands-off". To what extent can lower quality output (or longer development time) be tolerated during the stage when the team is in the initial developmental stage? Greater autonomy implies greater responsibility and less security. Is the team willing to shoulder the enhanced role and bear the increased risk? And what if the team accepts autonomy but not the corresponding responsibility? The result will be individualism in terms of lack of concerted efforts, and worse still – selfishness and abuse. However, the fact that the team is not yet ready does not refute the applicability of the Ignatian approach to leadership, but it does call for thoughtful and patient planning of staff formation.

Secondly, the nature of the organization, including its vision, mission, objectives, technological and competitive environment, will place different levels of constraint on adoption of Ignatian Leadership. Jesuit organizations, with as their major objective promotion of their vision and inculcation of Jesuit and Christian values and worldview, will find Ignatian Leadership pertinent. Ignatian Leadership is also very much suited to educational institutions since development of the team is central to this leadership approach and development of students is what the team, who are themselves teachers, is in turn expected to do to students. It may also be easy for organizations that provide human service to this approach relevant. However, will it be too much

of a stretch to apply the approach to for-profit organizations such as the investment bank[4]? Certainly, there are greater limitations, but such limitations should not rule out its applicability entirely. Afterall, for-profit organizations exist to solve some problems ultimately traceable to *human* needs. What is more, organizations are there to enable cooperation of *humans*, not machines. And, as stated earlier, the broad evolutionary trend of the workplace as driven by the advancement in technology means that Ignatian Leadership has actually increased in relevance across the board.

Challenges and Tensions

Discussion in the previous section brings out one of the key tensions for Ignatian Leaders – the extent of systematization of the organizational processes. The respect for, even celebration of uniqueness of individual team members, and the emphasis placed on "formation" rather than on "discipline" are some of the factors behind this tension. Systematization can provide certainty to the staff, enhance efficiency, allow for scalability, and enable accumulation of organizational learning beyond the tenure of individual leaders. However, the standardization that it inevitably involves, is somewhat inconsistent with the personalized Ignatian approach. A common experience of laypersons who have worked for both Jesuit and non-Jesuit institutions is their simultaneous appreciation and frustration with the flexibility, and by inference, the underdevelopment of systems of the former. This tension is further heightened with the increasing expectation from the public for transparency and accountability.

Obviously, a balance has to be struck between standardization and personalization. However, before we see them as a simple tradeoff on a continuum, it is worthwhile to appreciate the fact that there are different ways towards "standardization". Some ways may imply less sacrifice of personalization. Here we may refer to Henry Mintzberg's theory about "missionary organizations" (of which religious orders are prime examples) which manage to get a large group of people to work together with minimum system and supervision. What fundamentally glues these people together is the common (i.e. standardized) faith they hold <u>inside</u>, and this common faith is so strong and deeply held by all members that it reduces the needs for standardization of processes on the <u>outside</u>. So here is a way of standardization which implies less sacrifice of personalization. Admittedly, this method cannot bind laypersons together to the same extent as clerics, but it does highlight the fact that the greater the consensus on and embracing of the organizational mission, the less the need for reliance on system. Hiring and formation for mission can thus

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[4] The best seller *Heroic Leadership* written by one-time Jesuit seminarian turned investment banker Chris Lowney, is about how the 5-century-old principles of leadership of the Society of Jesus can make 21th century readers, regardless of religious faith, dynamic leaders.

allow for less systematization of external structures and processes, and greater scope for Ignatian Leadership.

Another dilemma or tension faced by Ignatian leaders is role conflict. A key ingredient of Ignatian leadership is that the leader takes on the role of a mentor who develops the team in a way tailored to its characteristics, and a teacher who is inclined more to facilitate than to instruct. On the other hand, the leader is accountable to the quality of the team's work, and in this duty he/she also has the role as a supervisor who must state clearly what is expected, urge the team to move towards the desired goal in a timely manner, and pass frank judgement on how well the team has performed. In the case of consistent or serious substandard performance, he/she has to take disciplinary actions. The potential problem is that the team may be confused when the former nurturing and facilitative role and the latter supervisory role are performed by the same person.

Communication skills and allowance for sufficient time[5] for the team to reconcile the two seemingly inconsistent "faces" of the leader will be helpful. Besides skills and time, trust is also important as it will sustain the team's goodwill as it struggles with the leader's ostensibly opposite orientations. To achieve trust, sincerity of the leader demonstrated not just through words but also the concrete experiences of working together is key.

Becoming Ignatian Leaders and Humility

What makes for an Ignatian Leader? A lot of the qualities are about how he/she relate to people, such as listening skills, communication skills, coaching skills, empathy, interest in people, open-mindedness, authenticity, humility. One is tempted to sum these attributes up with the term "people skills". While some items on the list can be called "skills", such as listening, communication and coaching skills, it is problematic to refer to the others, such as authenticity and humility, in the same way. They are about "who one is", not "what one can do". Treating them as skills in the sense of "what one can do" borders on artificiality, if not dishonesty, and misses the key point about human relationships entirely. In fact, such "who" attributes are

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[5] One suggestion to reconcile this apparent role conflict is to have two separate leaders. This is surely one way, but it may violate the principle that "a man cannot serve two masters". What we cannot do by separating the person, may be done by separating the "timing" when the different roles are performed by the same person. God has shown His face over time through different interactions with man, and most of us manage to appreciate the sophisticated nature of God and his messages to us gradually, i.e. also over time, rather than instantly.

arguably more difficult to develop, yet more important. In what follows, I shall focus on what I regard as the most important and tricky one: humility.

Humility is a key attribute required for Ignatian Leadership as he/she needs to restrain himself/herself from bossing around and to let their subordinates take charge, and be recognized. However, it also poses the biggest challenge.   Leaders tend to have certain traits which make it more likely that they end up in such positions. They may be ambitious, have a large ego, want to implement their vision, or simply that they feel more strongly than others about how things should be done and would want to have a platform to realize their vision which can well be selfless rather than selfish. Thus, it is natural for them to want to take control and to speak up when things are not going as they want. However, relinquishing some control and speaking less (and when they do, then to question, stimulate, and facilitate, rather than to instruct) are important for Ignatian Leadership.   How can this be possible?

It requires more than simply disciplining oneself to be humble because team members can quickly sense that the humility is "forced". Humility that is authentic will also have much greater effect. It requires leaders to have the wisdom to see themselves as they truly are: "imperfect, yet perfectible", that they are "sinners yet loved". Recognizing that they are imperfect, they will be more open to what the team can offer and more tolerant of the team's imperfections too. Believing that they are perfectible, they feel hopeful rather than diminished, despite acceptance of their limitations[6]. With this appreciation, then the leader will be humble not because it is good or virtuous, but because it is truthful to do so. This is liberating for the leader and healthy for the organization, and it addresses the seeming contradiction between common dispositions of leaders and Ignatian Leadership mentioned earlier.

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[6] Personally, I have been very much inspired by the philosopher Karl Popper to accept my imperfections while at the same time holding out faith that I am perfectible. For me, it also echoes the Christian belief that we are all sinners yet there is chance for salvation because we are all loved.

Karl Popper is a philosopher of science. His insight is that it is through experiments that go wrong (i.e. that they do not go as predicted by our theories) rather than experiments that go right (i.e. that go as predicted), that we may get hints on how our theories can be improved. The reason is that no scientific theory can be "proved" by experiments or observations even if they repeatedly confirm the theory. Confirmation for experiments conducted or observations made just entails that no contradiction has yet been found, but "proof" means that all experiments or observations, including all future ones not yet done, will confirm the theory. This is logically impossible. For example, for the observations we have made about the sun so far, they have all confirmed that the sun rises from the east. However, they cannot prove that the sun will forever rise from the east. In fact, with our scientific knowledge today, we know that the sun, being a star, will not rise from the east one day because it will perish eventually.   Thus, it is futile to try to "prove" our theory.   The more meaningful and achievable thing to do should rather be to "improve" the theory so that it is "closer" to the truth. In other words, no theory is "perfect", yet all theories are "perfectible".

Being truthful in this way, humility as manifested is authentic. This in turn will engender trust important to any leadership-team relationships, and particularly so to relationships in Ignatian leadership. What the leaders say will not be seen as manipulative. As mentioned, humility is not a "skill" to be acquired but a "person" to grow into. It is about personal maturity at different levels: intellectual, emotional, moral and spiritual developed through experience, reflection and contemplation[7].

Conclusion

This is an exploration of the relevance of applying Ignatian Leadership in modern organizations in the context of the evolving workplace. It also ventures into possible tensions that this leadership approach may involve within organizations, between the leaders and their teams, and within the leaders themselves. It is the view of a practitioner (and not a very successful one at that) in the field, with all the biases and limitations that this entails. As such, it attempts to elicit further debates and ideas.

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[7] The Chinese words *Xiu Yang* (修養) or *Xiu Wei* (修為) may be able to capture better the quality of "maturity" of the person in this sense.