

Teaching Leadership in the Ignatian Tradition
Two coasts; two business schools – one goal

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ABSTRACT

As criticism of the current approaches to educating business leaders continues to mount, we offer an alternative model for educating future business leaders. Our novel approach draws on the teaching of St. Ignatius of Loyola, the founder of the Jesuits, as well as literature that demonstrates how those teachings apply more generally to modern business. Moreover, unlike others, we teach these principles of Ignatian leadership to underclassmen undergraduate students at two different geographically diverse universities.

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INTRODUCTION

Calls for changes in the way business schools teach leadership were reignited soon after the demise of Enron, Worldcom, Arthur Andersen and the many other companies that collapsed in the early part of the century. As news channels broadcast the “perp walks” of fallen executives, multiple writers (e.g., Baradacco 2006; Bennis and O’Toole 2005; Mintzberg 2005) began to question the lessons students were learning in their business programs. In particular, there was a sense that the ethical training future business leaders were receiving was inadequate. These calls for reform in educating business leaders have all but reached a fever pitch in the wake of the “Flash Crash” (Dabu 2009; The Economist 2009; Epstein 2010; O’Toole and Bennis 2010). How could the “best and the brightest” in business have allowed personal avarice to bring the economy to the brink of an economic abyss?

For many years, Warren Bennis has been at the forefront of the calls for reform. Bennis’ early work transformed the way leaders were educated in American business schools. Notably, Bennis recognized the role of judgment and emotion in decision making as part of leadership formation, and the importance of having a strong moral compass (Shelton 2006). Recently, others have echoed the need for increased ethical

leadership among business executives, including the Association for the Advancement of Collegiate Schools of Business (AACSB) (2004), Delbecq (2009) and Sherman (2009).

Schools, as diverse as Stanford University and the University of Toronto have announced plans to change their graduate business curricula in response to the reformists (Wallace 2010). John Hopkins, likewise, has launched a new program designed to “reinvent” MBA education (Damast 2010). Undergraduate programs, however, have received much less attention to date. Moreover, the leadership education included in undergraduate programs tends to take place in the junior and senior years. Although the AACSB has pointed out the need to introduce undergraduates to the concepts of principled business leadership, this oversight has been largely ignored (Wallace 2010).

This paper offers an alternative to the status quo. In doing so, it makes two contributions. First, it chronicles two examples of introducing freshman and sophomore business students to leadership studies in two very different student populations that can serve as models for other innovators. Second, this introduction to leadership is framed, in both cases, by the principles St. Ignatius of Loyola used in founding and guiding the Society of Jesus (commonly known as the Jesuits). While these principles are drawn from a particular religious tradition, they are broadly applicable to all business practice, as illustrated below, and could be applied in most any business setting.

The rest of the paper is organized as follows. A brief review of the relevant literature on Ignatian leadership principles is included in the next section, followed by a description of the innovations introduced at two AACSB-accredited schools: one on the East coast and one on the West coast. Concluding comments follow.

LITERATURE REVIEW

An Ignatian Approach to Leadership

Bennis' (1989) pioneering work laid the groundwork for many of the modern reforms in business education. As noted above, this included recognition of the role of judgment and emotion in decision making and the importance of ethics. These concepts, while innovative in terms of traditional management theory, were not at all new to the concept of leadership first espoused by Ignatius Loyola and his "company" – the Jesuits. Two modern management writers, Lowney (2003) and Darmanin (2005), have demonstrated the application of Ignatius' principles to modern leadership studies.

Lowney

Lowney (2003) offers a leadership model that combines the best thinking from management theorists with the teachings of St. Ignatius. Drawing from his experiences, both as a Jesuit seminarian and a Wall Street executive, Lowney (2003) offers the following observations on leadership: "we're all leaders and we're leading all the time; leadership springs from within ... ; leadership ... is a way of living; ... becoming a leader [is] an ongoing process" (2003, 20). Lowney's leadership model, which he labels Heroic Leadership, includes four values that are at the core of Jesuit life: self-awareness, ingenuity, heroism and love (Lowney 2003, 9).

For Jesuits, self-awareness is an outcome of the Spiritual Exercises – a 30-day introspective journey of prayer and reflection. Lowney encourages those who don't have the time (or desire) to pursue the Spiritual Exercises to follow the pattern of the Daily Examen – a self-reflective habit of making a mental "pit stop" several times a day to

review the day's activities (2003, 107-08). This practice contributes to the continuing development of the leader.

Lowney describes ingenuity as “the ability to innovate, to absorb new perspectives, to respond quickly to opportunities or threats, and to let go of strategies that no longer work to embrace new ones” (2003, 140). The Jesuits' embrace of this concept is illustrated by the following passage Lowney quotes from Loyola in the *Constitutions*: a Jesuit “should be ready to leave unfinished any letter” (2003, 137). Loyola further identifies this attribute as “living with one foot raised” (Lowney 2003, 237).

Everyday leadership can be heroic according to Lowney. He suggests that Jesuits define heroism “not by the scale of the opportunity but by the quality of the response to the opportunity” (2003, 206). It requires that the leader desires to contribute to something bigger than him/herself.

The final tenet of Lowney's model – love – is perhaps the most surprising as a critical component of a leadership model. However, as Lowney points out, “individuals perform best when they are respected, valued and trusted by those who genuinely care for their well-being. Loyola was wise enough to perceive this bundle of winning attitudes as the essence of “love”” (2003, 170). In Lowney's words, “Love lends purpose and passion to ingenuity and heroism” (2003, 237). Thus, he suggests, that the sum of the parts of his leadership model is greater than any one characteristic by itself.

Darmanin

Darmanin (2005) approaches Ignatian practice from a different perspective and shows how many of today's buzz words in leadership theory are key tenets of Ignatius'

approach to management. He suggests that while Ignatius may not have been familiar with terms such as transformational leadership, organization culture, empowerment, accountability or globalisation [sic], he intuitively understood these concepts and applied them in founding and leading the Jesuits (2005, 1).

Ignatius started with a clear vision of the change he hoped to effect – to “help souls” (O’Malley 1993, 26), but he was able to adapt that vision to changing circumstances, allowing, for example, an expansion into the educational apostate. Thus, Darmanin argues Ignatius’ leadership was transformational in that he exhibited “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 (2005, 3-4). Moreover, Ignatius left behind a model for future generations to guide the evolution of the mission of the Jesuits in the *Constitutions*.

Ignatius also created a common organizational culture among Jesuits. All Jesuits share a common experience: the Spiritual Exercises. This shared experience lays the basis for a distinct organizational culture. Darmanin defines corporate culture as follows: “It includes a company philosophy, a set of key values and belief systems, members’ attitudes and behaviours [sic], 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.” (2005, 4)

In discussing empowerment, Darmanin picks up on a characteristic of the Jesuits that was also cited by Lowney. Ignatius vested authority to make decisions in his subordinates. This allowed the Jesuits to be more nimble and respond to changing

conditions. Such decentralization of decision-making required that authority and responsibility be delegated equally, assuring accountability (Darmanin 2005, 5-6). As Lowney notes, “ingenuity blossoms when the personal freedom to pursue opportunities is linked to a profound trust and optimism” (2003, 109).

Finally, both Lowney and Darmanin recognize the global reach of the Jesuits. Loyola viewed his ministry as universal (Darmanin 2005, 6-7). As an example of this global orientation, Lowney notes that “nationality was rarely an overriding concern” in choosing leaders for teams of Jesuits (2003, 138). Moreover, the Jesuits have continued this global commitment; today’s Jesuits are organized into ten assistancies that cover every continent save Antarctica.

An Application of Ignatian Leadership to Graduate Business Education

As Lowney and Darmanin show, the principles by which Ignatius Loyola founded and led the Jesuits are broadly applicable to business. Indeed, these principles reflect many of the best practices espoused by today’s secular business writers. Recognizing this, Loyola Marymount University (LMU) has taken the four attributes of Lowney’s Heroic Leadership model and bundled them into a concept it labels “Leadership Intelligence.” While these elements had been loosely included in LMU’s Executive MBA (EMBA) program since its launch in 2000, Lowney’s work gave LMU the impetus to integrate the elements and make the linkage between the elements explicit (Lindsey & Pate 2006, 10). To do this, the LMU EMBA program addresses emotional intelligence, “introduces a values-based ethical decision making model and principles of social

responsibility,” and incorporates such techniques as journaling, reflection and meditation (Lindsey & Pate 2006, 13).

Applying Ignatian Leadership to Undergraduate Business Education

LMU’s EMBA program is not alone in adopting Lowney’s model (see Lindsey & Petit 2008, for a description of actions to incorporate principled leadership in Jesuit EMBA programs). Few, if any, undergraduate business programs, however, have adopted this approach. Yet, researchers suggest such education is not only appropriate for the undergraduate population, but also necessary. Loeb indicates an undergraduate ethics course is needed to “set the stage” for ethical development (1988, 232). Similarly, Sims and Brinkmann propose that “faculty should include in the undergraduate curriculum a variety of experiences that assist in the student’s moral sensitivity development (e.g., increasing students’ self-knowledge …)” (2003, 75).

A course in which the students are exposed to Ignatian leadership principles would address the concerns noted by Loeb and Sims and Brinkmann. Indeed, Spitzer suggests that the problems in business ethics can largely be resolved by helping students develop a “purpose in life and principles” (2010, 104). In the following section, we discuss how we use Ignatian principles as the frame for the courses we teach to inspire freshmen and sophomore undergraduate business students both to become more self-aware and to become principled business leaders.

TEACHING LEADERSHIP IN THE IGNATIAN TRADITION

As a first step, the course in which Ignatian Leadership will be taught must be designated. In the first school, a medium-sized Jesuit school on the east coast, Ignatian

leadership principles are incorporated into a revised Business Ethics class. This class has traditionally been offered to upperclassmen, but this particular section of the course is offered to sophomores enrolled in a residential college program. The students in this school are largely traditional college-age students, and the majority of them come from upper middle-class backgrounds.

In the second school, a medium-sized Jesuit school on the west coast, Ignatian leadership principles are incorporated into a new course for incoming freshmen. The course, *Becoming Principled Business Leaders*, is one of a number of alternative “freshmen launch” business courses in which the students may enroll in. Each freshmen launch course has some business topic which is dependent upon the interests of the teaching faculty member. The students in this school are largely traditional college-age students, and the majority of them come from lower- to middle-class backgrounds.

Course Objectives and Content

The courses share certain common objectives: to increase students’ ethical perception; to introduce students to Ignatian discernment; and to improve the students’ ethical decision making skills. As earlier researchers note, the course content, design, delivery and means of assessment are all critical to the success of a course (Lavoie & Rosman 2007, 105). In both of these courses, a large portion of the content is determined by the principles associated with Ignatian leadership.

Students gain familiarity with Lowney’s model of Heroic Leadership by reading assigned sections of Lowney’s book. Other readings that echo Lowney’s themes are also included as readings, for example William Bryon’s *The Power of Principles: Ethics for*

the New Corporate Culture and certain of the Pastoral Letters issued by U.S. Catholic bishops, including of those on the economy and the environment. Additional content areas include global ethics (reinforcing the global nature of Ignatius' approach as highlighted by both Lowney and Darmanin), and a review of a significant number of cases drawn from across all disciplines in business.

Course Design and Delivery

Decisions on course design and delivery are guided by the tenets of the Ignatian Pedagogical Paradigm (IPP), an educational approach derived from the Spiritual Exercises that is clearly compatible with the principles of Ignatian leadership. The five components of the IPP include context, experience, reflection, action and evaluation. (For a fuller discussion of the IPP, see Van Hise and Massey 2010.) Moreover, the last tenet of the paradigm – evaluation – inherently incorporates course assessment as well. An additional aspect of delivery in both of these courses is that a business faculty member, rather than a faculty person from the arts and sciences faculty, teaches the course.

Lowney's Heroic Leadership Model

Self-awareness

A number of design/delivery elements of both courses help to develop Lowney's first tenet, self-awareness. The students start the course by writing an autobiographical essay. In this essay, they address such questions as

- What do I want to do?

- How will I achieve meaning through a career in business?
- How much money do I want to make?
- How will I contribute to the well-being of my fellow man?
- Who do I want to be in 20 years?

Throughout the semester, the students are also required, in both courses, to write reflective papers that help the students to personally appropriate the material in the course. These reflective papers are guided by a series of questions that serve as prompts:

- What aspects of the class most deeply affected me? Why?
- Did I gain any new insights in class?
- Did anything I experienced in class change the way I see myself? Others?

Ingenuity and heroism

Consistent with the research on teaching ethics (Coyne, et al. 2005), the students are introduced, through cases, to a number of positive and negative exemplars. The introduction of exemplars provides the context for a discussion about particular ethical decisions. Moreover, these heroes and villains open the door for a discussion of the second and third aspects of Lowney's model: ingenuity and heroism. The students discover that the "heroes" often rise to fame by choosing an uncommon response to a challenging situation. The "villains," on the other hand, may employ ingenious schemes to defraud the public, but it is unlikely that they do so to contribute to a greater good.

Love

An active learning technique used in both classes is the debate. Two teams of students debate a controversial business ethics topic, and are then questioned by the rest of the class on the issue. In previous semesters, debate topics have included gender, race and age discrimination, affirmative action, sexual harassment, whistle blowing, outsourcing and the use of sweat shops, wealth redistribution and government bailouts. Both teams are required to prepare both sides of the debate and are assigned to a particular position by a coin toss at the beginning of the class. Not only does this generate better debate since both sides are better prepared, it also helps the students to see and understand “the other;” indeed many students “switch sides” as the debate continues into open class discussion. This process also helps the students to develop empathy, a key step towards “love” in Lowney’s model.

Another classroom policy reinforces the development of “love.” In both classes, classroom conversations are treated as confidential. This extends both to comments made by individual students, and by the instructor. (The current ad campaign: “What happens in Vegas, stays in Vegas” helps the students quickly grasp this concept of confidentiality.) While we encourage the students to continue the conversation beyond the classroom – and indeed many students do just that – no one student’s individual positions should be discussed by others outside of class. The students learn that treating others with dignity and respect is non-negotiable. In our experience, this policy also generates richer and deeper classroom discussion and encourages participation from those who might otherwise not participate.

Additional Aspects of Ignatian Leadership

The debates also serve to empower the students to take on leadership roles. Often, by the end of the debate, the students have discovered that they do not find either debate position acceptable. (This is especially the case when the students debate affirmative action policies.) We then challenge the students to develop an alternative approach. This technique supports many of the characteristics of Ignatian leadership: empowerment, accountability, and transformational leadership.

In order to help the students make ethical decisions, we introduce discernment as a decision-making technique. This explicitly spiritual process is derived from the Spiritual Exercises, and reinforces all of the tenets of Lowney's model. For those students who are not comfortable engaging the spirit in decision making, Lonergan's "questing," which is, essentially, a variation on discernment, is introduced. An additional benefit of discernment is that it can be practiced in groups – the way many decisions are made in business.

Assessment

The final tenet of the IPP requires continual evaluation. In both of these classes, the students' growth is assessed largely through their writings. The students submit multiple reflective papers over the course of the semester. Mintz suggests that such reflection can be transformative (2006, 112).

In the reflections, the students demonstrate the extent to which they have personally appropriated the material covered in class. In addition, as the semester progresses, the students increasingly draw connections, in their reflections, between the

classroom material and their other classes, things that are happening in the “real world” and events in their own lives. In doing so, they demonstrate personal growth: increased ethical perception and skill in approaching ethical decisions, and a more integrated approach to life.

Finally, each course includes a capstone project that requires that the students to gain in-depth knowledge about a particular ethical dilemma. In both analyzing and reflecting upon the situation, the students bring to bear the technical and ethical skills they have learned in the class, as well as their own personal beliefs – and a final reflection on the class.

Perhaps the ultimate evaluation of classes such as these are whether this approach produces leaders who will be o more ethical business leaders. While it is too soon to know if this goal has been achieved, one additional evaluative measure can be considered – the popularity of the courses. Despite the onerous writing requirements, which typically dissuade business students from registering for classes, these classes are repeatedly oversubscribed.

CONCLUSION

While many decry the failure of leadership training in today’s business schools, we suggest a novel solution to educating future business leaders. Our approach incorporates two unusual features: 1. we start early – with freshman or sophomores; and 2. we base our approach on the leadership model derived from the teachings of St. Ignatius of Loyola, the founder of the Jesuits. To date, we have successfully adapted the

approach to serve two very different student populations. This suggests that others might also be able to successfully adapt it to meet their individual and local needs.

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