

1-1-2016

## The Management Exercises: A Way Forward with Purpose

Richard W. Stackman

*Associate Professor, School of Management, University of San Francisco, rwstackman@usfca.edu*

Kimberly Rae Connor

*Professor, School of Management, University of San Francisco, connork@usfca.edu*

Follow this and additional works at: <http://epublications.regis.edu/jhe>

---

### Recommended Citation

Stackman, Richard W. and Connor, Kimberly Rae (2016) "The Management Exercises: A Way Forward with Purpose," *Jesuit Higher Education: A Journal*: Vol. 5 : No. 2 , Article 7.

Available at: <http://epublications.regis.edu/jhe/vol5/iss2/7>

This Praxis is brought to you for free and open access by ePublications at Regis University. It has been accepted for inclusion in Jesuit Higher Education: A Journal by an authorized administrator of ePublications at Regis University. For more information, please contact [epublications@regis.edu](mailto:epublications@regis.edu).

## The Management Exercises: A Way Forward with Purpose<sup>1</sup>

Richard W. Stackman  
Associate Professor, School of Management  
University of San Francisco  
[rwstackman@usfca.edu](mailto:rwstackman@usfca.edu)

Kimberly Rae Connor  
Professor, School of Management  
University of San Francisco  
[connork@usfca.edu](mailto:connork@usfca.edu)

### Abstract

This paper outlines the Management Exercises, a co-curricular program that reflects the more — the *magis* — to better prepare students as future leaders and citizens. The Management Exercises seek to further orient students toward a life of questioning and engagement as students learn to exercise discernment, to build character, and to enact citizenship. The four modules that comprise the Management Exercises are outlined in conjunction with the implementation of the Management Exercises into the school's MBA program.

### Introduction

Jesuits are never content with the status quo, the known, the tried, the already existing. We are constantly driven to discover, redefine, and reach out for the *magis*. For us, frontiers and boundaries are not obstacles or ends, but new challenges to be faced, new opportunities to be welcomed. Indeed, ours is a holy boldness, “a certain apostolic aggressivity,” typical of our way of proceeding.<sup>2</sup>

Today, more than ever, we face seemingly insurmountable challenges economically, socially and environmentally. These challenges require educated men and women willing and able to fashion a more humane and just world. Communities *demand more* from organizations and the leaders of these organizations. Organizations and their leaders *ask more* from those educated and then hired to work in these organizations. And students and graduates of our universities *seek more* from their education in order to better fathom the world's inherent complexity and contribute to its peace and prosperity.

This *more* we all seek risks becoming trivialized unless we define it in terms of *magis*, a “holy boldness,” as described the proceedings of the 34<sup>th</sup> General Congregation. The pursuit to build sustainable and inclusive communities is at the

very heart of a Jesuit university education. Our Ignatian values not only infuse what we do daily as educators but call upon us to harness the resources already at our disposal. However, *New York Times* columnist David Brooks recently wrote:

Universities are more professional and glittering than ever, but in some ways there is emptiness deep down. Students are taught how to do things, but many are not forced to reflect on why they should do them or what we are here for. They are given many career options, but they are on their own when it comes to developing criteria to determine which vocation would lead to the fullest life. ... In short, for the past many decades colleges narrowed down to focus on professional academic disciplines, but now there are a series of forces leading them to widen out so that they leave a mark on the full human being.<sup>3</sup>

Brooks challenges universities to create opportunities for students to examine moral options, foster transcendent experiences, investigate current loves and teach new things to love. They should also apply the humanities, mirroring the sentiment of Rev. Peter-Hans Kolvenbach, S.J., the 29<sup>th</sup> Superior General of the Society of Jesus, who stated: “Tomorrow's ‘whole

person' cannot be whole without an educated awareness of society and culture with which to contribute socially, generously, in the real world."<sup>4</sup>

Jesuit universities are known for educating the "whole person" through curricular and co-curricular offerings. With this in mind, Jesuit business schools are in a unique position, given their traditions and values, to respectfully emulate the Spiritual Exercises, as envisioned by Ignatius Loyola, to prepare students at both the undergraduate and graduate levels to be better leaders and, thus, better global citizens. Choosing to study at a Jesuit school entails more than the location, tradition, reputation, and cost. Students should not merely receive an education in business (management). And, management, as a profession, should be concerned with professional values about the *why* and *what* of managerial action, not just the *how*.<sup>5</sup> Therefore, students should be prepared to face the world as people of intention grounded in an ethical perspective informed by the proven technique of spiritual direction designed by St. Ignatius.

Students can acquire ethical frameworks and build character at any university, but the distinction for a Jesuit institution is the *Ignatian* model, built on the development of discernment as a life-long habit. To Jesuits, we are all leaders, leading all the time, well or poorly.<sup>6</sup> Bryon addresses the "specifically Jesuit dimension of leadership" which involves "humility, the notion of '*magis*', and the process of 'discernment.'" <sup>7</sup> He uses the word "humbition" — defined as "a blend of humility and ambition that relies on power of persuasion rather than formal authority"<sup>8</sup> — as a term understandable to the secular world but one that stills retains the characteristically Jesuit approach of humility, *magis*, and discernment.

Finally, important and specific to Jesuit education: It recognizes the whole person's context as s/he comes to the experience of education, reflects on what s/he has learned, acts on his/her informed intentions, and evaluates his/her performance in a *magis*-driven desire to improve and accomplish more for others. *Magis* embodies the act of discerning the best choice in a given situation at a given time to better glorify or serve God/the good, though it does not mean to do or give "more" to the point of exhaustion. Because *magis*

is the value of striving for the better — striving for excellence — it is an expression of both aspiration and inspiration.

In this paper, we outline the Management Exercises as created for the School of Management at the University of San Francisco (USF). The Management Exercises are our attempt to develop a co-curricular program that reflects the more — the *magis* — to better prepare students as future leaders and citizens. The Management Exercises seek to further orient students toward a life of questioning, learning, and engagement. Students, consequently, learn to exercise discernment, to build character, and to enact citizenship. We first discuss the Spiritual Exercises and discernment. The design for the Management Exercises is then provided before we outline how the Management Exercises will be implemented into our redesigned full-time MBA program curriculum. Before offering our conclusions, we address other issues and potentialities for the Management Exercises.

### **The Spiritual Exercises and Discernment**

The Spiritual Exercises prepare individuals to participate in the transformation of the world.<sup>9</sup> They involve the examination of one's consciousness through prayer, meditation, and contemplation by an individual so that s/he is aware of his/her own dignity and the "presence of God in all people and all things."<sup>10</sup> The Spiritual Exercises are a means to enhance reflection and are predicated on Ignatius Loyola's greater concern for thoughts misleading the emotions rather than vice versa.<sup>11</sup> Central to the Spiritual Exercises are imagination and discernment. The Spiritual Exercises are designed to touch the affective domain and teach people to stay in touch with their dreams.<sup>12</sup>

Jesuit spirituality is derived from the writings of the Society's founder, St. Ignatius of Loyola, who developed the Spiritual Exercises, a compilation of meditations, prayers, and contemplative practices to help people deepen their relationship with God. For centuries the Exercises were most commonly given as a "long retreat" of about thirty days in solitude and silence, a practice still observed by most Jesuits today at least several times during their vocational years. In recent

years, however, there has been a renewed emphasis on and practical adaptations of the Spiritual Exercises as a program for laypeople and even for non-religious people who can substitute “good” for “God” in their quest to deepen their awareness of the meaning of their lives and actions.

Discernment focuses on identifying a decision that we face or an issue we need to resolve.<sup>13</sup> Through discernment, individuals strive for Ignatian indifference, which is “a state of inner freedom, openness, and balance that allows us to beforehand not to incline more toward one option than to another but to allow our preference [to] be shaped by the single criterion of what will enhance our ability to love God and to embody that love for others.”<sup>14</sup> It is a time to contemplate and to dialogue with those who will be intimately affected by the decision being made. To that end, we are then able to live out the decision with “courage, hope and trust,” though tinged with some uncertainty.<sup>15</sup>

The goal of the Spiritual Exercises is an active life *and* a contemplative life<sup>16</sup> where the head, heart, and hand work in concert together. Ultimately, one has enlarged and deepened his/her grasp of the truth.<sup>17</sup> Such individuals are mindful. Mindful people avoid old ways of thinking and behaving, stay alert to new possibilities, and pay close attention to what is going on in the present moment.<sup>18</sup> An important component of the Management Exercises is, therefore, mindfulness through meditation and reflection, so that students develop empathy and humility.

Understanding character and character development is also essential to the Management Exercises with respect to negotiating and integrating the levels of analysis — individual, team, organization, and society — in their development as people of character. Character is defined as “those interpenetrable and habitual qualities within individuals and applicable to organizations that both constrain and lead them to desire and pursue personal and societal good.”<sup>19</sup> A *character-based leader* is “someone with the necessary self-control (moral discipline) to selflessly act on his or her volition (moral autonomy) to inspire, sustain, and transform the attitudes of and beliefs of both self and followers.”<sup>20</sup>

Implied in the character-based leader description is this: It is a character-based leader who can (and should) positively affect other individuals, the team, the organization, and society. When one acts in a pro-social way, the result is the individual and everyone else are better.<sup>21</sup> “*True self interest is mutual interest.* The best way to improve your likelihood of surviving and thriving is to make sure those around you survive and thrive.”<sup>22</sup> This focus beyond oneself (the individual) to the greater whole (society) is captured in the works of Katz and Bradley<sup>23</sup> and Liu and Hanauer.<sup>24</sup> In the *Metropolitan Revolution*, Katz and Bradley argue for the remaking of urban and suburban places into livable, quality, affordable, and sustainable communities that offer more residential, transport, and work options to firms and families alike.<sup>25</sup> In blending ecosystem and enterprise, “multiple public, private and civic actors are empowered to look across challenges, naturally connecting the dots between related issues,”<sup>26</sup> where these related issues reflect the economic, social and environmental challenges that combine to create “wicked problems.”

For Lin and Hanauer, people are interdependent creators of a dynamic world via the interlocking realms of citizenship, economy, and government. They note that there is no such thing as a self-made person, and they pose several pointed questions<sup>27</sup> pertinent to the Management Exercises:

- What does it mean to be a citizen, to live in public, to be a contributing and effective member of a community?
- What is the purpose of an economy, and how, in a free society, can the market work to serve all people?
- What is government for?

Reflecting on Edmund Burke, and evoking discernment, Brooks writes:

[Leadership] begins with a warm gratitude toward that which you have inherited and fervent wish to steward it well. It is propelled by an ardent moral imagination, a vision of a good society that can't be realized in one lifetime. It is informed by

seasoned affections, a love of the way certain people concretely are and a desire to give all a chance to live at their highest level.<sup>28</sup>

### The Management Exercises: The Design Overview

The marrying of head-heart-hand through a reflective practice is at the core of the Management Exercises. This practice, like the Spiritual Exercises, will be guided by questions. In his article “The Good Life: Good Money, Good Work, Good Friends, Good Questions,” Torbert contends that “the good life” begins with questions, as good questions never die.<sup>29</sup> Questions connect us to the wider universe. They grow relationships, vocations, and value/wealth. They are at the very heart of our understanding to what guides our life.<sup>30</sup> Good questions are also related to character and its development. Examples from Badaracco’s book include:

- *Do I have a good dream?* Am I dreaming with my eyes wide open? Which dreams will you abandon? Are these really my dreams? My dream or our dream?
- *Are my role models unsettling?* Does my role model meet deep needs? What does my role model elicit from me? Does my role model offer gifts of discomfort? Do I have down-to-

earth role models? Do I have “will fix” role models?

- *What is sound reflection?* Can I shift perspectives? Is my reflection messy enough? Am I encouraging real dialogue? Love or passion? Do I hold the gods in awe?<sup>31</sup>

Stressing reflection and meditation, thus creating a “spiritual retreat,”<sup>32</sup> students will work their way through four modules (see Table 1), guided by assigned readings, meditations, and activities. Students will link reflection and learning from experience (past, present, and future). Central to the Management Exercises is the integration of the levels of analysis critical to management education — individual, team, organization, and society. The “care of” each level relates to the four pillars of leadership — self-awareness, love, ingenuity, and heroism — as outlined by Lowney in his book *Heroic Leadership*.<sup>33</sup> (See Table 1 for the definitions of the four pillars.) There is an inherent logic to following the path set forth by St. Ignatius because of the spiritual logic of moving from self to society to world, or how it is further framed with respect to synchronicity, solidarity, subsidiarity, and sustainability (also defined in Table 1), which reflect the common good for ethical integrity discernment.<sup>34</sup>

**Table 1.** Structure of the Management Exercises

Module 1 Self	Module 2 Others	Module 3 Organization	Module 4 Society
<p><b>Character:</b> We form our character in defining moments because we commit to irreversible courses of action that shape our personal professional identities. We reveal something that had been only partially known.<sup>35</sup></p> <p><b>Self-Awareness:</b> Understands one's strengths, weaknesses, values and worldview.</p> <p><b>Synchronicity:</b> Is my decision true to my deepest values and uncompromising principles?</p>	<p><b>Stakeholders:</b> Students must let the gritty reality of this world into their lives, so they can learn to feel it, think about it critically, respond to [the world's] suffering and engage it constructively.<sup>36</sup></p> <p><b>Love:</b> Engages others with a positive, loving attitude.</p> <p><b>Solidarity:</b> What decision would more positively affect the most vulnerable people?</p>	<p><b>Culture:</b> Organizations should have an intentional and broadened purpose with a clear understanding that "business is a part of society and not apart from society," and businesses should consider their possible impact.<sup>37</sup></p> <p><b>Ingenuity:</b> Confidently innovates and adapts to embrace a changing world.</p> <p><b>Subsidiarity:</b> Is my decision empowering others and promoting leadership development in my organization?</p>	<p><b>Higher Purpose:</b> Individuals should find themselves in moments that are the direct result of the work, sacrifice, and passion to be disturbers of an unjust peace.<sup>38</sup></p> <p><b>Heroism:</b> Energizes themselves and others through heroic ambitions.</p> <p><b>Sustainability:</b> Is my decision making a positive change for the community and future generations?</p>

Sources: The terms *Self-awareness*, *Love*, *Ingenuity*, and *Heroism* are from Chris Lowney, *Heroic Leadership: Best Practices from a 450-year-old Company that Changed the World* (Chicago: Loyola Press, 2003); the terms *Synchronicity*, *Solidarity*, *Subsidiarity*, and *Sustainability* are from Marco Tavanti, "Integrity for the Common Good: The Missing Link Between Neoliberalists and the 'Occupy' Discontents," in *Integrity in Organizations: Building the Foundations for Humanistic Management*, eds. Agata Stachowicz-Stanusch and Wolfgang Amann (London: Polgrave Macmillan Publishers, 2012), 82-104.

Each module reinforces what has come before while simultaneously fostering what is to come next. Thus, the Management Exercises apply the Ignatian pedagogical paradigm of context, experience, action, reflection, and evaluation in a carousel model. The Management Exercises are not a get on and get off approach or check-the-box endeavor. Ultimately, the learning outcomes from participation in the Management Exercises emphasize each participant's ability to:

- Appreciate the Jesuit educational qualities of (1) a passion for quality and excellence and (2) a preoccupation with questions of ethics, justice, and values in both one's personal and professional lives<sup>39</sup>
- Integrate self-awareness, love, ingenuity, and heroism into his/her daily life across the four levels of conscious leadership (capitalism) — self (leadership), others (stakeholders), organization (culture), and society (higher purpose) — and the principles of synchronicity, solidarity, subsidiarity, and sustainability
- Enhance critical thinking skills as demonstrated through speaking and writing
- Make informed decisions through discernment
- Develop one's understanding of character, including his/her own
- Build organizations with purpose

### **The Management Exercises: The MBA Program Example**

The Management Exercises can and should be tailored to a given student population (or program). At USF, the Management Exercises will first be offered in a fully online format as a required co-curricular option in the school's redesigned, two-year, full-time MBA program. However, the Management Exercises can be integrated into any program as a required curricular element or an optional co-curricular activity. The Management Exercises can also be offered to a school's alumni. As an optional co-curricular or alumni offering, the online format

would allow individuals to complete the Management Exercises in a more individual-specific timeframe.

Each of the four modules contains three elements or assignments: (1) read/watch, (2) practice (examen), and (3) reflect. The proposed schedule with assignments for the MBA Program is provided in Appendix 1. The design is such that students complete the majority of the assignments during times when they are not consumed by coursework in their classes. The read/watch and practice assignments can be completed prior to the start of each semester, either during the summer or the fall-spring semester intersession breaks. Furthermore, several reflection assignments are completed as part of a given course, notably the Ethical Will (Module 1) and the One Block Exercise (Module 3).

If we consider Module 1, as an example, it kicks off during the student's two-day orientation. Prior to attending the orientation, students will have viewed the videos and read the assigned readings for Module 1. It is during the orientation that the Management Exercises will be formally introduced to the students after first hearing about the University's Jesuit history and values. Subsequent to the orientation students will complete the practice assignment, which in the case of Module 1 is a Discernment Examen (of two meditations) and their Ethical Wills. The Ethical Will is a graded assignment in the required core Ethics and Social Responsibility course. Students can choose the medium in which they provide the completed reflection assignment. They will be encouraged to be creative whether they upload a document or video. The subsequent three modules mimic the structure of Module 1. Appendices 2 and 3 provide the instructions for the examens and reflections, respectively.

Over the two-year period, the design should create space and time so that a habit of reflection and discernment develops. Furthermore, given the integration of two reflective assignments in the program's curriculum, we have attempted to demonstrate how curricular and co-curricular activities can work in concert with one another. Finally, while the Management Exercises curriculum is offered and managed online — that is, via Canvas at USF — students will not

experience the Management Exercises in a solitary, self-guided manner. For the MBA students, each will have a personal board to guide them through the Management Exercises. This personal board accompanies each student during the journey that is the Management Exercises. Students will rely on their respective boards — composed of at least one peer (in the MBA program), a faculty or staff member from the School of Management, and one outside individual (e.g., an alumnus or a business leader) — as they engage with the required readings, grapple with questions, and complete assignments. These personal board members are expected to simultaneously challenge and nurture. They are expected to listen quietly and to outwardly mirror behaviors. Most importantly, they are in the best position to help each student appreciate his or her growth over time. In turn, their involvement should further develop or refine their own habits of reflection and discernment.

### **Other Issues and Potentialities**

The Management Exercises remain a work-in-progress at USF. They will evolve over time as we naturally replace readings and assignments. We have specifically chosen to provide just enough detail in this paper. Each school interested in the Management Exercises will need to make them their own, given their own unique programming and student population contexts. Within our own school, we have just begun to discuss how the Management Exercises will be integrated into our EMBA and undergraduate programs. The undergraduate program is a particular challenge as it enrolls over 2,300 students, of whom over 35% are international. While the four modules lend themselves to a specific year of study from freshman to senior year, there are logistical challenges implementing the personal board element as well as tying specific reflections to graded course assignments at the undergraduate level. More thought and imagination is required here, and it is our hope that we will develop a dialogue among other schools and thus learn how other schools are implementing programs similar to the Management Exercises.

Students will be oriented to the Management Exercises during their general MBA orientation. After that, it is the student's responsibility to invite

and inform his or her external board members. The process of doing so helps the student build ownership of his/her commitment and deepens awareness of the process they are to undertake. Preparing participating faculty, however, will not be the student's responsibility. Rather, MBA faculty will be generally oriented to the program and in consultation with the program director will elect to participate should a student invite him or her to do so. Although over time faculty will come to know the program more intimately, we hope that on their first iteration, faculty and external board members will experience some of the discovery and inspiration we hope to elicit from students.

While we are agnostic regarding a final assignment following Module 4, such an assignment could be used to assess student learning and development. If so, and for AACSB accreditation purposes, a program-specific learning outcome could be assessed via a rubric tied to such an assignment.

Finally, if we have truly created a robust program, students who graduate should continue to practice discernment on a daily basis. They need not be alone in this practice. We make this point because the Management Exercises were never envisioned to be an autonomous program; they can be integrated with other practices or programs developed by other organizations. The Ignatian Business Chapters (IBC) organization, housed at Le Moyne College, is one such program.<sup>40</sup> IBC was established to support an international network of business leaders who strive to approach business decisions in ways that reflect their faith and values in order to positively impact their organizations. Members of these chapters seek to contribute to society in ways that serve the human spirit, the local community, and the world at large. The chapters operate like cells: clusters of like-minded individuals self-organizing and collaboratively investing the know-how of individuals.<sup>41</sup> We can foresee how the existence of such cells of USF graduates who completed the Management Exercises could also provide useful assessment data.



## Conclusion

As the world seemingly speeds up, the practice of discernment on a daily basis invites us to slow down and pay attention to our day and, if needed, adjust our perspective. Space and time must be created and defended for reflection. The Management Exercises are rooted in *cura personalis* — that is, the care of the person — and *cura apostolica* — that is, the care of the work or corporate body. Practicing *cura personalis* is part of the Jesuits’ “way of accompanying” each other, as a company of brothers, and their way of accompanying all of humanity. Practicing *cura apostolica* means the duty to show solicitude for the good of the institutions we identify with as a whole. Care of the work, in other words, is connected to care of the person because the soundness and well-being of our institutions directly affects the lives of everyone. Most importantly, our connections to others and their myriad of experiences are far greater than our individual differences.

The Management Exercises focus on developing a practice that informs how each of us daily practice leadership. Our development as leaders is a never-ending journey where we will be tested again and again. We will at times lose our way. Continuing to learn and reflect is the *sine qua non* to finding our way back to a better place than before. The Management Exercises provide a way to marry one’s head, heart, and hands, allowing one to refocus on the question(s) at hand. Thus, the Management Exercises have never been about the deliverables. By intention the Management Exercises do not result in a formal plan as to how one’s life should unfold linearly over time.

While the Management Exercises are not envisioned to be a capstone course, the intent for their development reflects a recent call for a capstone course

... where students explicitly focus on the purpose of business and the responsibility of management. Such a course could reinforce the mission and values of Jesuit schools of business by forcing an extended debate between shareholder value perspective, contemporary management challenges to that

perspective, and the long tradition of Catholic Social Thought. Such an interdisciplinary capstone course ... has the potential to reinforce the mission of our schools and to play a critical role in the formation of our graduates to be men and women with and for others throughout their business careers.”<sup>42</sup>

As designed, the Management Exercises should “permeate” the entire school. The Management Exercises address comments expressed by the late C. K. Prahalad at the Ross School of Business (University of Michigan), a preeminent scholar in eradicating poverty via a “bottom of the pyramid” focus:

I think business school should not become a sophisticated trade school. ... I think the difference between a trade school and a school for educating people is adding the moral and ethical component. If you had all the education and no moral and ethical component, it’s just a trade school. It’s not about just teaching a class in ethics, but it must permeate the entire being of the school because moral questions and ethical questions don’t come labeled as such. ‘I have a moral question today’ is not how we cope with our lives. It comes all the time; we have to make choices.<sup>43</sup>

Through questions, practice, and reflection, the Management Exercises add a moral and ethical lens through which graduates can make choices that benefit the many and not just the few. We can only hope they further enlighten students with respect to their chosen vocation:

Business is a noble vocation, directed to producing wealth and improving the world. It can be a fruitful source of prosperity for the area in which it operates, especially if it sees the creation of jobs as an essential part of its service to the common good.<sup>44</sup>

**Appendix 1.** MBA Program Example

	<b>Practice</b>	<b>Reflection (Assignments)</b>
<b>Module 1 — Self</b> [Orientation/Fall Semester Year 1]		
Randy Pausch video: <a href="#">“The Last Lecture”</a>	Discernment	Ethical Will
David Foster Wallace reading: <a href="#">“This Is Water”</a>	Examen	
William Torbert reading: <a href="#">“The Good Life”</a>		
<b>Module 2 — Others</b> [Intersession 1/Spring Semester Year 1]		
Krista Tippett video: <a href="#">“Becoming Wise”</a>	Gratitude	Mission Statement
Gabriel Garcia Marquez reading: <a href="#">“The Most Handsome Drowned Man in the World”</a>	Examen	
David Badaracco reading: “The Discipline of Building Character” ( <i>Available through Harvard Business School Publishing</i> )		
<b>Module 3 — Organization</b> [Summer Break/Fall Semester Year 2]		
Video: <a href="#">G-Dog</a>	Dedication	One Block Exercise
Rebecca Solnit reading: <a href="#">“Infinite City”</a>	Examen	
The Metropolitan Revolution: <a href="#">An Interview with Bruce Katz</a>		
Hollensbee reading: <a href="#">“Organizations with Purpose”</a>		
<b>Module 4 — Society</b> [Spring Semester Year 2]		
Martin Luther King, Jr: <a href="#">“Letter from Birmingham Jail”</a>	Confirmation	At The Table Exercise
University of Texas McCombs School of Business dramatization: <a href="#">Letter From Birmingham Jail</a>	Examen	
<a href="#">The Gardens of Democracy</a> reading		

## Appendix 2. Examens

### **Module 1 — Discernment**

The Management Exercises begin with two meditations that draw on Ignatian language and Buddhist contemplative practices. The first gently prepares you for meditation, so that you can learn how to adapt your life to arrange time to slow down and reflect; the second is an adapted practice of the daily examen in order to develop a reflective practice in your personal and professional life and to deepen your understanding of your own ways of identifying and embodying the God/good in your life and to prepare you for moments of active discernment.

#### Meditation 1: Stop and See

Consider Spirit as Breath. With intention and gratitude welcome Spirit into your day and in this company of co-conspirators, breathing together. Take a pose conducive to stillness. Become aware of breath. Silence and still your mind.

- Deepen your prayer by breathing it in silence
- Follow where your breathing leads to new Spirits
- Receive guidance from Spirits in your life
- Recall your own Spirit to awaken

Trust your breathing. Doubt your habits. Resolve your Spirit. Find your Way. Be mindful of each moment.

#### Meditation 2: Character Examen

Settle into a comfortable position. Be aware as you breathe in and out. Maintain this awareness with each breath.

- As you breathe, recall individuals in your life who have shown you love. Stay with each individual to appreciate his or her particular grace. Acknowledge their love with gratitude. Let your prayer to God be a silent exclamation of thanks to them. Continue to inhale love.
- After you acknowledge the ways you have been loved by others, recall those who have hurt you. Confront your fear and give it a name. Silently speak to those who hurt you. Listen and learn their fear. Continue to exhale fear.
- Now recall individuals who you may have harmed. Place them before you and ask forgiveness. Breathe deeply your awareness of their hurt and your role in causing it. Expel your selfishness.

### **Module 2 — Gratitude**

As we continue deepening our understanding of what the practice of an examen can accomplish, we ask you to conduct an examen not as a meditation (although if you can continue your meditative practice as well all the better) but as a structured act and subsequent reflection. Here are the basic steps of an examen practice that we have adapted for the second module of the Management Exercises:

1. Recall your blessings and give thanks
2. Reflect on your challenges and consider your feelings
3. Review your thoughts and ponder your actions
4. Regret your mistakes and ask for help
5. Renew your character and hope for the future

In order to appreciate your own unique traits and abilities as well as those of others, continue to practice the examen but this time with a recognition of all for which you have to be grateful for that you find in others. Consider how you accompany others through life and, in turn, how they accompany you. Begin by identifying one day a week as Gratitude Day.

### **Module 3 — Dedication**

For this module we ask you to again practice the examen but now with specific attention to your workplace, present, past, or future. We have created a Review of the Day for Managers that you can apply in your own setting as a way to recognize how discernment has shaped your professional experiences and choices as you practice your own examined way of proceeding. Some questions you might ask yourself include:

- From your perspective as a manager, what was the high point of the day? Why? Can you discern a pattern in what constitutes high points? What can you do to increase the number and duration of these high points?
- And the low point of the day? Again, look for reasons and patterns. What would you do differently if you were given the chance for a “do over”? How can you decrease the likelihood of repeating the same kinds of low points?
- When were you working at your best during the day? Recall as many details as you can. What made it your best work? Were you working alone? With others? Who brings out the best (and worst) in you? Why?
- When did you struggle to stay focused and engaged? What were you doing that challenged your focus? Was this an isolated incident, or is this something you deal with a lot of the time?
- How hectic was the day? Do you prefer to be busy and on-the-go all the time, or would you rather have more time to pause and reflect? Why?
- Think about each of your direct reports. Imagine how he/she might have pictured interacting with you. Do you think there might be a disconnect between his/her perceptions and reality? Why? What concrete things could you do to improve communication between you and your direct reports?
- Look toward tomorrow. Are you going to make any changes in your demeanor, communication styles, and attitudes? What are you going to do to help your direct reports work more effectively and with greater satisfaction?

### **Module 4 — Confirmation**

You will conclude the Management Exercises with a broader reflective examen that will ask you to step back and take on the task of a final program assessment whereby you will ask yourself how has your experience intensified and improved your life and those of others.

1. Reflect on your past: What led you to undertake an MBA degree?
2. Reflect on the present: What has changed, personally or professionally, since you became an MBA student and over the course of your degree program?
3. Reflect on the future: How do you anticipate your educational experience, as an MBA student, will chart a course for your future, personally and professionally?

**Appendix 3. MBA Program Reflections (Assignments)**

**Module 1 — Ethical Will**

An Ethical Will is an informal document that will be included with your other estate planning papers. It is a “letter to the future” in which you share the relationships, accomplishments, and values that made your life satisfying. This letter takes no special training to write, and does not have to follow any particular format; it is simply your opportunity to tell your beneficiaries what is important to you. Writing an Ethical Will is also an opportunity to explain any unexpected or unusual decisions, choices, or gifts you have made in your estate planning. In this document, you can help your executors and heirs understand and appreciate your choices.

It is important not to make any gifts, or promises of gifts, large or small, of things or assets, as these may conflict with the formal documents your attorney will write. *This is a love letter to the people you care for.* Here are some things to consider as you write this letter:

Preparatory Thoughts. To whom do you wish to write? What do you want them to learn from this letter? What would you like to convey by the way you distribute your assets?

Reflections to Consider. *About your estate:* What work and effort went into gathering your estate? To whom are you indebted for gifts you received? How have you been helped by inheritance? What are the gifts you are giving? Are you making any sentimental gifts? *About your life:* What are the important things you have done? Why are they important to you? What is your greatest achievement? What is your greatest regret? What aspirations do you have now? *About your relationships:* What does “family” mean to you? What does “friendship” mean to you? Whom have you loved? What gifts did you receive from them? What do you want them to remember you for? *About your faith and values:* What has made your life worthwhile? What do you believe about life and death? How have your beliefs helped create your life? What charitable gifts would you like to make?

The original and authoritative website for Ethical Wills is: [www.ethicalwill.com](http://www.ethicalwill.com)

**Module 2 — Mission Statements**

Many management scholars have argued that defining a strong mission for companies and corporate entities is a useful step toward performance improvement. Managers and CEOs have begun widespread adoption of formal mission statements to do just that. Although skeptics doubt that talking about organizational mission is constructive, results suggest that missions do vary substantially and that the choices that managers make in the content and rhetorical style of their mission statements can have consequences that facilitate or impair subsequent performance.

Here is some language to use when setting forth a mission statement. *Values:* the good, the right, and the beautiful, (etc.) correspond to *Ethical Systems:* utilitarianism, deontology, virtue, (etc.) which correspond to *Moral Conduct:* obligations, duties, and aspirations (etc.)

*The Jesuit Higher Education for Business* reading explains the way the academic institution in which you are enrolled envisions the relationship between its values and the practice of business and business education, beginning with the premise that “business is not a morally neutral endeavor”

(<http://issuu.com/creightonbiz/docs/jesuitbusiness/2>). Remember that Jesuits set forth this model in the context of a mission statement that affirms “The Jesuit Catholic tradition that views faith and reason as complementary resources in the search for truth and authentic human development, and that welcomes persons of all faiths or no religious beliefs as fully contributing partners to the University...”

(<http://www.usfca.edu/about/values/>).

Initial Assignment. Step 1: Using the Jesuit Higher Education for Business reading as a guide, create a mission statement for the MBA program. Step 2: Using organizational and professional mission statements related to your workplaces, refine the mission statement you just created.

MBA Six-Word Mission Statement. From there, try to get your MBA mission statement down to a six-word statement, following the inspired logic of Smith magazine’s six-word method. This method is developed from Ernest Hemingway’s famous six-word novel: “*For Sale. Baby Shoes, Never Worn.*” For fun, here are some other

examples: Most Unfortunate Misnomer (“Named me ‘Joy’. Didn’t work out.”); Most Metaphorical (“Kept my hands inside the ride.”); Most Optimistic (“Starting year number thirteen. Feeling lucky.”); Most Confident (“I’m odd. Acceptance isn’t my goal.”); and Most Adventurous (“Babyboomer wanting one more little boom.”).

Six-Word Personal Mission Statement. Now generate your own six-word mission statement to describe your professional goals and aspirations. Then offer a brief explanation of several paragraphs describing your mission statement and interpreting its importance to your professional and academic career. Describe the stages of your mission statement development, listing the iterations of each statement with a transitional description of how/why the statement was refined. Indicate what role, if any, your USF education has played in your mission formation.

### **Module 3 — One Block Exercise<sup>45</sup>**

This assignment prepares you for the social impact/innovation project. This project requires a project proposal that will be explicit in its innovation and impact — in either a nonprofit/social/community-based or corporate for-profit setting. Once your chosen organization for the project has been identified, you begin this assignment by walking, paying attention to, and noting multiple features of the one block in which the organization is physically present. By present it is meant the organization is physically located within the block or provides its services. From there, you will deepen your view of the block by undertaking a critical examination of the interconnections among many facets of the block. You are to examine the interconnections of as many facets of the block that you can identify: managerial action, civil society, and the social world. Questions to ask yourself include:

1. In what patterns of interwoven human institutions and social phenomenon is the organization embedded at any given time?
2. In each interwoven pattern, what kinds of civic life and civil society does the organization support and stymie?
3. In each interwoven pattern, what kinds of socio-cultural phenomena thrive and suffer because of the organization?
4. In what does your organization reflect layers of historical interconnections between human acts and the society inhabited there?

In this way you will be establishing a strong and informed foundation for undertaking your Innovation Project. You will have practiced the vision of a discerning and caring human who strives to look at a situation from many points of view before deciding how to act or what to do.

### **Module 4 — At The Table Exercise**

In this final reflection, consider — and appreciate — your journey during the MBA program via the Gratitude Examen. Review your Ethical Will, your Six-Word Mission Statement, and your One Block assessment. Consider the contributions of your personal board members. With a clear sense of how much you have accomplished and intend to accomplish, reflect on what *more* you can — and will — do daily to enhance life experienced by you, others, and society. In other words, what *more* can you do on a daily basis — in either small or grand ways — to unlock potential of what already exists?

This concept of *magis*, as you came to understand in your practice, brings together not just the many aspects of your experience described above but also the concept of time: who you were before the MBA, who you were during the MBA, and who you hope to become after the MBA. Thus, this concluding assignment asks you to use your imagination to create a dinner party with you and *three* invited guests. The guests may be from any time or place, personal or public, famous or common. *The only requirement is that you explain why you chose each person to join you and how that person supports your personal growth through the Management Exercises.* Finally, add a late, surprise guest who must be someone who accompanied you through the Management Exercises, either a peer, a family member, or even an author whose work you read during the Management Exercises.

Because you are limited, as with the Six-Word Mission Statement, to only invite four guests, you will be making many assumptions and choices along the way about how you support your personal development. Should there be a gender or ethnicity balance? Should your companions be familiar or challenging? Extend

your imagination beyond the guests and decide other details: the setting of the dinner party (decorations?), the menu (recipes?), the entertainment (music?), the time of day (maybe it's a brunch!), and so forth. Finally, will there be a defining question or theme for the dinner party?

Let your mind wander, noting that Jesuits practice a version of this exercise regularly in their spiritual devotions and prayers. *The composition of place*, which is described in the Spiritual Exercises, recommends to Jesuits that when contemplating or meditating, they should strive to see in imagination the material place where the object is that they wish to contemplate.<sup>46</sup>

How do you see yourself — your soul — at your imaginary gathering? Present your dinner party documentation as you are inspired: an invitation, a program guide, a newspaper account, a diary entry— however you feel most comfortable imagining yourself “at the table,” relaxing after a long journey and sharing the fruits of your labor with your fellow souls.

---

## Notes

<sup>1</sup> We thank Marco Tavanti for his helpful insights in the development of this paper. Frank Fletcher and Lynette Ferguson provided keen insights on the logistics and implementation of the Management Exercises in the School of Management MBA program at USF. John Fontana, of Le Moyne College, was enthusiastically highlighted in the potential links between the Management Exercises and Ignatian Business Chapters. Finally, a USF Jesuit Foundation Grant graciously funded this project.

<sup>2</sup> Gonzaga University, "General Congregation 34, Decree 26," accessed March 25, 2014, <https://www.gonzaga.edu/about/mission/docs/GC34Decree26.pdf>

<sup>3</sup> David Brooks, “The Big University,” *New York Times* (October 6, 2015): A31.

<sup>4</sup> Peter Kolvenbach, S.J., “The Service of Faith and the Promotion of Justice in American Jesuit Higher Education,” speech at the Conference on Commitment to Justice in Jesuit Higher Education, (Santa Clara University, October 5-8, 2000).

<sup>5</sup> Jeffrey Pfeffer, “Why Do Bad Management Theories Persist? A Comment on Ghoshal,” *Academy of Management Learning & Education* 4, no. 1 (2005): 96-100.

<sup>6</sup> Chris Lowney, *Heroic Leadership: Best Practices from a 450-year-old Company that Changed the World* (Chicago: Loyola Press, 2003).

<sup>7</sup> William Byron, S.J., “Humility, *Magis*, and Discernment: A Jesuit Perspective on Education

for Business Leadership,” *Journal of Jesuit Business Education* 2, no. 1 (2011): 9.

<sup>8</sup> Byron, “Humility,” 12.

<sup>9</sup> William A. Barry, S.J., “What Are the Spiritual Exercises?,” in *An Ignatian Spirituality Reader*, ed. George W. Traub (Chicago: Loyola Press, 2008), 121-128.

<sup>10</sup> Barry, “What Are the Spiritual Exercises?,” 124.

<sup>11</sup> Dennis J. Moberg and Martin Calkins, “Reflection in Business Ethics: Insights from St. Ignatius’ *Spiritual Exercises*,” *Journal of Business Ethics* 33, no.3 (2001): 257-270.

<sup>12</sup> James W. Fowler, “An Experience of the Contemporary Personally Guided Spiritual Exercises,” in *An Ignatian Spirituality Reader*, ed. George W. Traub (Chicago: Loyola Press, 2008), 136-138.

<sup>13</sup> Wilkie Au and Noreen Cannon Au, “Refining the Acoustics of the Heart,” in *An Ignatian Spirituality Reader*, ed. George W. Traub (Chicago: Loyola Press, 2008), 192-216.

<sup>14</sup> *Ibid.*, 204.

<sup>15</sup> *Ibid.*, 207.

<sup>16</sup> James Gaffney, “Ignatian Discernment,” in *An Ignatian Spirituality Reader*, ed. George W. Traub (Chicago: Loyola Press, 2008), 155-158.

<sup>17</sup> Robert R. Newton, “Reflections on the Education Principles of the Spiritual Exercises: Summary Conclusions and Questions for

Teachers,” in *A Jesuit Reader*, ed. George W. Traub (Chicago: Loyola Press, 2008), 274-279.

<sup>18</sup> Ellen J. Langer, *Mindfulness* (Reading, MA: Addison-Wesley, 1998).

<sup>19</sup> Thomas A. Wright and Jerry Goodstein, “Character Is Not ‘Dead’ in Management Research: A Review of Individual Character and Organizational-Level Virtue,” *Journal of Management* 33, no. 6 (2007): 928.

<sup>20</sup> Thomas A. Wright and Tyler L. Lauer, “What Is Character and Why Does It Really Matter,” *Organizational Dynamics* 42 (2013): 30.

<sup>21</sup> Eric Liu and Nick Hanauer, *The Gardens of Democracy: A New American Story of Citizenship, the Economy, and the Role of Government* (Seattle, WA: Sasquatch Books, 2011).

<sup>22</sup> Lin and Hanauer. *Gardens of Democracy*, 39.

<sup>23</sup> Bruce Katz and Jennifer Bradley, *The Metropolitan Revolution: How Cities and Metros Are Fixing Our Broken Politics and Fragile Economy* (Washington, D.C.: Brookings Institution Press, 2013).

<sup>24</sup> Lin and Hanauer, *Gardens of Democracy*.

<sup>25</sup> Katz and Bradley, *The Metropolitan Revolution*, 13.

<sup>26</sup> *Ibid.*, 8.

<sup>27</sup> Lin and Hanauer, *Gardens of Democracy*, 41.

<sup>28</sup> David Brooks, “The Leadership Emotions,” *New York Times*, April 24, 2014: A25.

<sup>29</sup> William R. Torbert, “The Good Life: Good Money, Good Work, Good Friends, Good Questions,” *Journal of Management Inquiry* 3, no. 1 (1994): 58-66.

<sup>30</sup> Torbert, “The Good Life.”

<sup>31</sup> Joseph L. Badaracco, Jr., *Questions of Character: Illuminating the Heart of Leadership Through Literature* (Boston: Harvard Business School Press, 2006).

<sup>32</sup> Byron, “Humility.”

<sup>33</sup> Lowney, *Heroic Leadership*.

<sup>34</sup> Marco Tavanti, “Integrity for the Common Good: The Missing Link Between Neoliberalists and the ‘Occupy’ Discontents,” in *Integrity in Organizations: Building the Foundations for Humanistic Management*, eds. Agata Stachowicz-Stanusch and Wolfgang Amann (London: Polgrave Macmillan Publishers, 2012), 82-104.

<sup>35</sup> Joseph L. Badaracco, Jr., “The Discipline of Building Character,” *Harvard Business Review* 76, no. 2 (1998): 114-124.

<sup>36</sup> Kolvenbach, “The Service of Faith and the Promotion.”

<sup>37</sup> Elaine Hollensbe, Charles Wookey, Loughlin Hickey, and Gerard George, “Organizations with Purpose,” *Academy of Management Journal* 57, no. 5 (2014): 1228-1229.

<sup>38</sup> Vernon E. Jordan, “Whom Shall I Send?,” commencement speech, Stanford University, Stanford, CA, June 13, 2015.

<sup>39</sup> R. A. Mitchell, S.J., “Five Traits of Jesuit Education,” in *A Jesuit Reader*, ed. George W. Traub (Chicago: Loyola Press, 2008), 111-112.

<sup>40</sup> The IBC organization is housed at Le Moyne College, [www.IgnatianBusinessChapters.org](http://www.IgnatianBusinessChapters.org).

<sup>41</sup> Raymond E. Miles, Charles C. Snow, John A. Matthews, Grant Miles, and Harry J. Coleman, Jr., “Organizing in the Knowledge Age: Anticipating the Cellular Form,” *Academy of Management Executive* 11, no. 4 (1997): 7-20.

<sup>42</sup> Stephen Porth and John McCall, “The Purpose of Business: A Jesuit Educational Challenge to Shareholder Primacy,” *Journal of Jesuit Business Education* 6, no. 1 (2015): 39.

<sup>43</sup> Lynn Perry Wooten, Anne Parmigiani, and Nandini Lahiri, “C. K. Prahalad’s Passions: Reflections on His Scholarly Journey as a Researcher, Teaching, and Management Guru,” *Journal of Management Inquiry* 14, no. 2 (2005): 173.

<sup>44</sup> Pope Francis, *Laudato Si’*, sec. 129, accessed October 11, 2015,



---

[http://w2.vatican.va/content/francesco/en/encyclicals/documents/papa-francesco\\_20150524\\_enciclica-laudato-si.html](http://w2.vatican.va/content/francesco/en/encyclicals/documents/papa-francesco_20150524_enciclica-laudato-si.html)

<sup>45</sup> Adapted from Daniel R. Gilbert, Jr., “Expanding the Significance of One Acre,” *Journal of Management Education* 27, no. 2 (2003): 236-245.

<sup>46</sup> St. Ignatius of Loyola, *The Spiritual Exercises of St. Ignatius of Loyola*, trans. Father Elder Mullan (New York: Cosimo: 2007): 35.