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## Mission and *Magis*: Strategic Planning in the Constitutions of the Society of Jesus

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### Abstract

Part VII of the *Constitutions of the Society of Jesus* addresses “The distribution of the incorporated members in Christ’s vineyard and their relations with their fellowmen.” In the process of presenting guidelines for assigning the members of the Society to various works, Ignatius reveals an approach to strategic planning that is richer than models in use today. Mission and *Magis* rather than simply goals and objectives. “Learning” the environment, not just scanning it. Preemptively attending to human resources. Focusing on “works which continue longer and are of more lasting value.”

*His genius lay, not in charming style like  
that of St. Theresa or St. Francis de Sales,  
nor in speculative wisdom like that of  
St. Thomas, but more in the practical  
wisdom of an apostolic organizer.<sup>1</sup>*

### Preamble

Strategic plans come and go. Some are blueprints for prosperity. Others fail to survive contact with reality. One has guided a global organization for centuries.

That plan was detailed by Ignatius of Loyola in the *Constitutions of the Society of Jesus*.<sup>2</sup> By 1550, he had crafted an initial version of the guiding documents for the Society he founded in 1547. The strategic plan embedded in that masterwork has inspired and guided the men of the Society ever since.

Part VII of the work is most relevant. The issue Ignatius tackles there is placing the members of the Society throughout the world in a manner that most effectively serves their collective mission over the long term. Mission is central. The members are the resource. The Jesuit sphere of influence – the Church and the world – is the environment within which the members serve. The goal is works “which continue longer and are of more lasting value.” [623, g]<sup>3</sup>

The Founder was contemplating the future of a brotherhood dispersed into a geographic, religious, social, and political environment that was by turns rich and hostile. He knew that his supply of men – his crucial resource – was limited in the face of the task ahead. And he was clearly focused on the long-term future of the Society. (That the Jesuits and their Constitutions have endured for 450+ years is proof enough of this last point.) Mission – environment – resources – long-term future: the essence of planning, strategic or otherwise.

At its most basic, strategic planning is a series of informed and prudential choices about the future directions of an organization. Over the long term, which set of actions and programs will best ensure the advancement of mission and accomplishment of organizational purposes? Strategic choice is the central issue. Strategic planning typically requires attention to these elements:

- Organizational mission – the *de facto* objective function of the system
- Environment – scanning and assessing the arena within which the system operates; often

codified in terms of opportunities and threats observed in the environment

- Resources – reviewing and positioning the system’s resources to accomplish the plan; frequently expressed in terms of organizational strengths and weaknesses.
- Planning horizon – consistent attention to the long term; at least three years, more often five or more.

The Ignatian model we examine here attends fully to each of these dimensions and enriches them in distinctive fashion. Organizational mission is broadened to encompass both global and local challenges and simultaneously joined with pursuit of the Ignatian *Magis*, the “more universal good.” Environment is not simply the setting for the organization’s actions but linked with mission as the opportunity for members of the Society to learn “. . . the ways in which souls can be helped in those places.” [636] All resources other than the human resource – the members of the Society – are treated as background. The planning horizon is not time bound; it is concerned only with “. . . works which continue longer and are of more lasting value.” [623,g] This is Ignatian strategic planning.

### Constitutions

The work entitled Constitutions of the Society of Jesus (Constituciones de la Compania de Jesus) is the collection of statutes or ordinances composed by St. Ignatius of Loyola for the inspiration and government of the religious institute he founded . . . the term Constitutions . . . is employed in a comprehensive sense to designate four separate treatises which he left . . . Frequently, however, the term Constitutions is also used in a more restricted sense . . . to designate the third of these four treatises, which is the pivot about which the other three revolve.<sup>4</sup>

Even at the macro level of the full document, there is harbinger of the Ignatian approach to planning. As Lowney observes in *Heroic Leadership*:

Loyola’s final project was translating the Jesuit vision into a set of rules and procedures robust enough to govern the fledging company. The result was the 250-page Jesuit Constitutions.

Fully two-thirds is monopolized by guidelines for selecting and training recruits . . . the implied message in the lopsided Constitutions is obvious: ongoing success depends on turning recruits into leaders.<sup>5</sup>

Whether we are talking about the members of the Society or the human resources of today’s jargon, the lesson is unmistakable. Planning is fundamentally about people.

The *Constitutions* are divided into ten Parts:

. . . he treated first of the individual members, their admission, formation, definitive incorporation into the Society, and application to its work (Parts I-VII), then of their relations among themselves and with their head or superior general (Part VIII), then of the general himself (Part IX), and lastly of the body of the Society as a whole and of its preservation and development (Part X).<sup>6</sup>

Our focus here will be on Part VII that addresses “The distribution of the incorporated members in Christ’s vineyard and their relations there with their fellowmen.”<sup>7</sup> Chapters within consider the missions received by the Society, the assignment of members to serve those missions, and the supports the members are to provide to one another and their fellowmen.

Chapter 1 identifies the Mission as the promotion of “the greater glory of God and the good of souls.” [603] Jesuits are to “travel to any place where they judge that greater service to God and the good of souls will follow.” [603] In accordance with the fourth vow of service to the Holy Father, “the members were to go to any place whatsoever where he judges it expedient to send them . . .” [603] “. . . they made that promise or vow in order that His Holiness might distribute them for greater glory to God.” [605] Ad Majorem Dei Gloriam is the global Mission.

In deciding mission assignments, the superior is charged with “pondering the greater universal good.” [611] This is the Jesuit *Magis*, the “more universal good,” as defined by Geger in “What *Magis* Really Means and Why it Matters.”<sup>8</sup> Mission and *Magis* together are the foundation of the Ignatian plan.

In serving Mission and seeking *Magis*, the men of the Society “may be sent to some places or others by the supreme vicar of Christ our Lord or by the superiors of the Society.” [603] If the superior is in a position to advise His Holiness, he “may give him better information” [607] or advise him against “some place which is not conducive to the common good of the Society and greater service to God.” [608] The details of the plan must be scrutinized before implementation.

The Jesuit who is missioned is advised to learn “how he desires him to accomplish the journey and to remain in the destination.” [610] “It is highly expedient that the mission should be entirely explained to the one who is to be sent...” [611] What are the details – the particulars – of the assignment? Actions guided by Mission and *Magis* proceed after careful discernment.

An assignment may be adjusted so long as the change does not conflict with the overriding mission. “. . . he ought to consider, but without prejudice to his mission, as has been said, in what other things he can employ himself for the glory of God and the good of souls.” [616] The plan may be revised in response to conditions and opportunities. The plan is not rigid.

With the primacy of Mission and the essential role of the *Magis* established, Chapter 2 treats the responsibilities of the superior in sending “any of the Society’s members whomsoever to whatsoever place these superiors think it more expedient to send them” [618] In doing so, the superior is advised to always use that procedure “which is conducive to the greater service of God and the universal good” [618]; “to keep the greater service of God and the more universal good before his eyes . . .” [622,a]

The *Magis* serves as the basis for an extensive list of factors that guide the superior in making decisions about distribution of members. These guiding questions form the substance of the Ignatian plan. Figure 1 lists these factors in the form of text excerpts from the *Constitutions*, Part VII.<sup>9</sup>

Guidance is provided to ensure that the members dispatched are those “who are more select and in whom greater confidence is had.” [624,a]

Choosing these members involves considerations of physical health, virtue and reliability, discretion and grace of conversation, skill and learning, talent for preaching, and balance among the members of a group. [624,a-j]

A larger number of members should be sent only if “the Society can provide more laborers without prejudice to other things conducive to the greater divine glory and the universal good.” [624,k] Distribution of members must always be guided by advancing Mission and pursuing the more universal good. An integrated perspective must be maintained throughout the planning process.

The remainder of Part VII addresses the details of sending members on specific missions. The superior should provide “complete instruction, ordinarily in writing about the manner of proceeding and the means which he desires to be used for the end sought.” [629] This is an echo of the careful discernment involved in defining mission assignments.

Of particular note is the recommendation that wherever the members are dispatched, “it is important to have learned the ways in which souls can be helped in those places.” [636] This is advice to *learn*, not simply examine, the environment within which the members will be serving.

Overall, Part VII of the *Constitutions* provides a complete guide to the missioning and deployment of the members of the Society. For our purposes, we may think of the superior as the planner, keeping an eye fixed on Mission and *Magis*, learning the environment where the members are to be sent, reviewing the fit between the members to be assigned and the work to be done, and strategically choosing works “which continue longer and are of more lasting value.” [623,g]

### **Mission and *Magis***

Ignatian strategic planning begins with mission. No surprise there. Most strategic planning starts with some sense of the organization’s reason for being, whether called “mission” or differently labeled. Modern Jesuit colleges and universities routinely anchor their strategic planning in institutional mission. Ignatius goes on to broaden the concept of mission but he unambiguously

**Magis-inspired questions to guide the superior in making choices about distribution of the members**

... keep the greater service of God and the more universal good before his eyes ... [622,a]

... that part of the vineyard ought to be chosen which has greater need ... [622,a]

... where the greater fruit will probably be reaped. [622,b]

... where one sees the door more widely open [622,b]

... a better disposition among the people [622,b]

... places where our indebtedness is greater ... [622,c]

... where there is a house or college of the Society ... [622,c]

... where there are members of it who study and are the recipients of charitable deeds from those people ... [622,c]

... preference ought to be given to those persons and places ... which can spread the good accomplished to many others who are under their influence or take guidance from them. [622,d]

... aid which is given to important and public persons ought to be regarded as more important ... [622,e]

... to the great nations ... to important cities, or to universities ...

... labor more intensely in those places where the enemy of Christ our Lord has sown cockle ... [622,f]

... where he has spread bad opinion about the Society or stirred up ill will against it ... [622,f]

... especially to be observed if the place is an important one of which account should be taken ... [622,f]

... the spiritual needs ought to be preferred to the bodily, the matters of greater perfection to those of less, and the things more good to those less good. [623,b]

... some things ... which are more urgent ... [623,c]

... things which are especially incumbent upon the Society ... [623,d]

... it is seen that there are no others to attend to them ... [623,d]

... when some are safer for the one who cares for them ... [623,e]

... when some are easier ... [623,e]

... and more quickly dispatched ... [623,e]

... some occupations which are of more universal good and extend to the aid of more of our fellowmen ... [623,f]

... works which continue longer and are of more lasting value ... [623,g]

Figure 1: Ignatian Guidance Concerning Distributing Members of the Society

begins with it. The planning principles shown in Figure 1 are twice introduced by affirmation of mission:

To proceed more successfully in this sending of subjects to one place or another, one should keep the greater service of God and the more universal good before this eyes. [622,a]

For better success in the choice of undertakings for which the superior sends his subjects, the same norm should be kept in view, namely, that of considering the greater divine honor and the greater universal good. [623,a]

The Mission of the Society is *Ad Majorem Dei Gloriam*, “the distinguishing characteristic of the Jesuit way of proceeding”.<sup>10</sup> Ignatius makes it clear: all Jesuit works are wrapped in this imperative. When a Jesuit college declares “This is a Jesuit school” it is explicitly embracing AMDG as the defining force of the institution’s work.

Having established Mission as the keystone, Ignatius enriches it in two important ways. First, the global mission is made particular or “local” by relating it to *needs* to be served and *fruit* to be reaped. Second, advancement of Mission is irrevocably aligned with pursuit of the Jesuit *Magis*, the more universal good. Not simply the universal good; the *more* universal good.

In Ignatian planning, the global Mission is tailored to specific times and local circumstances via two pieces of guidance. The superior is advised:

When other considerations are equal. . . that part of the vineyard ought to be chosen which has greater need . . . [622,a]

Consideration should also be given to where the greater fruit will probably be reaped . . . [622,b]

Notice that “greater need” and “greater fruit” are distinct concepts. *Need* pertains to the nature and scope of the problems to be addressed. Need is the opportunity for *applying* institutional mission. *Fruit*, on the other hand, refers to results; outcomes or value-added. Fruit is the potential for *advancing* institutional mission.

The juxtaposition of greater need and greater fruit is the first of several opportunities to observe the interrelatedness of the Ignatian planning criteria. No single measure should be applied in isolation. This is what Ignatius means by “When other considerations are equal (and this should be understood in everything that follows)” [622,a].

Institutional capabilities and proclivities must be considered in examining the trade-offs between need/opportunity and fruit/results. Serving some needs may simply be beyond the reach of the institution. Some fruit, though desirable, may be obtained only at too high a cost. Ignatius takes care to periodically remind us that a system perspective must be maintained throughout the planning exercise. Strategic choice is multi-dimensional.

Today’s Jesuit institutions may follow a similar path in relating mission to both need and fruit. Local ambitions, needs and circumstances, resources and constraints, history and tradition must all be considered. These individual institutional missions vary widely, even dramatically. The College of the Holy Cross would not be mistaken for the University of San Francisco (or vice versa). Georgetown, Gonzaga, and Xavier may all be blessed with fine basketball teams but are otherwise unique in their orbits. The four Loyolas cover all points of the compass but exhibit an even broader range of academic and professional specialties. And so on across the twenty-eight.

Distinctive (and even idiosyncratic) as these individual missions may be, Jesuit schools are bound to one another by their global mission. There is another – we suggest crucial – element to this bonding; namely, the Jesuit *Magis*. The *Magis* is the second distinguishing characteristic of the Ignatian model; the element that most clearly separates Ignatian strategic planning from the norm.

Twenty years ago, General Congregation 34 affirmed this linking of Mission and *Magis*, going so far as to place the *Magis* on virtually even footing with AMDG. GC 34 Decree 26 reads in part:

The entire life of Ignatius was a pilgrim search for the *magis*, the ever greater glory of God, the more universal good, the more effective apostolic means. . . . The *magis* is not simply one among others in a list of Jesuit characteristics. It permeates them all.<sup>11</sup>

Ignatius emphasizes the essential character of the *Magis*. “The more universal the good is, the more it is divine.” [622,d] The *Magis* is linked with both Mission imperatives referenced above. [622,a; 623,a] One alternative ought to be preferred over another “since it is a more universal good.” [622,e] The *Magis* is even presented as a kind of tie-breaker. “When everything mentioned above is equal and when there are some occupations which are of more universal good . . . preference should be given to the first set” [623,f]

The Mission is the lighthouse; the *Magis* marks the channel.



Drawing by Violet Mitchell, Regis College student

This reliance on the *Magis* should be comfortable for today's Jesuit colleges and universities. Their affinity for the *Magis* is readily evident. Some reference it explicitly in their mission statements or strategic plans. Others more implicitly. Many employ the *Magis* as a kind of talisman for various specialized works. Geger comments on this pervasiveness of the *Magis*:

. . . it is now commonly used as a proper noun to denote a key element of Ignatian spirituality. Especially in Jesuit schools. “*Magis* Student Groups,” “*Magis* Classes,” “*Magis* Retreats,” “*Magis* Scholarships,” “*Magis* Auctions,” “*Magis* Institutes,” and “*Magis* Committees,” are ubiquitous.<sup>15</sup>

Some years ago, this author was closely involved with the crafting of a strategic plan for Regis University that relied heavily upon the *Magis*. “*Searching for the Magis*” was ratified by the University Board of Trustees. Each component of the plan was located in terms of relationships to the *Magis*. *Striving for the Ignatian magis by celebrating the academic mission. Honoring the Ignatian magis by enriching diversity. Seeking the Ignatian magis by fostering meaningful growth.* Seven dimensions in all. The *Magis* permeated the entire plan.

Thus far, Ignatian strategic planning is both familiar and distinctive. Familiar in that it begins with and rests upon the centrality of mission. Distinctive in that it further grounds the mission by simultaneously linking it to both “greater need” and “greater fruit.” And most importantly, unique in that it requires pursuit of the *Magis* as an integral part of the planning process.<sup>12</sup>

### Learning the Environment

Ignatian strategic planning includes an innovative approach to understanding the environment within which the plan will unfold. Central to this approach is the advice that “it is important to have learned the ways in which souls can be helped in those places.” [636] The emphasis is twofold. *Learning* the environment is the objective, not simply scanning or surveying. *People* (“souls”) are the heart of the matter. With this dual emphasis as context, the model delivers an array of guidance; a selection drawn from items listed in Figure 1.

Ignatius turns first to seeking opportunities in the environment. The superior should be disposed to choose works “. . . where one sees the door more widely open and a better disposition among the people along with compliancy favorable to their progress. This disposition consists in the people’s greater devotion and desire . . .” [622,b] This is an attempt to locate fertile ground for the Mission, *Magis*, and works of the Society.

This advice may be taken literally or figuratively. Direct mission and ministry work, for example, will likely progress more successfully in an environment enthusiastic about renewal of the spirit. Students attending Catholic high schools may well be more inclined to attend a Jesuit college. Educational renewal may encompass spiritual renewal.

More literally, “the door more widely open” comes in many forms. What better result of environmental examination could be found than enthusiasm for the programs and works under consideration? What more could a college ask than a “better disposition” among its potential students? Although Ignatius would not have used the term, this criterion may easily be seen as addressing “market,” one of the key dimensions of any organization’s environment.

Note that we speak of “market” rather than “need.” There can be tension or even conflict between these two concepts. *Need* refers to an opportunity to be of service. *Market* refers to the willingness of some sector of society to expend resources in pursuit of a want. Mission-related need and market-identified want will sometimes align well. For example, students in *need* of a liberal arts education may also *want* such an experience. Alternatively, need and want may conflict as when students in *need* of a value-based education may only *want* a pathway to a well-paying job after graduation. Here again, the necessity for a holistic perspective in balancing the Ignatian criteria is evident.

Though he does not explicitly address “competition,” Ignatius appears to appreciate the value of identifying sectors of the environment that are not crowded with others engaged in the same work. The superior should choose “. . . things that are especially incumbent upon the

Society or it is seen there are no others to attend to them.” [623,d]

In strategic terms, this is advice to put distinctive capacities of the institution to work in arenas where such works are not in evidence, i.e., where there are no direct competitors. Which sectors of the environment have the fewest competitors for the programs and works of the institution? Which sectors are most crowded with competitors of one form or another? Where is it “especially incumbent” for the institution to proceed because there are “no others” crowding the same sector of the environment?

Ignatius also suggests that part of learning the environment is identifying direct support and regard for the works of the Society. In his words:

In places where our indebtedness is greater, for example, where there is a house or college of the Society where there are members of it who study and are the recipients of charitable deeds from those people. [622,c]

Strategic questions are evident here. Which individuals/organizations are the benefactors of the institution? Which organizations/individuals may serve as collaborators and partners in extending the reach of the institution’s mission? This idea is cousin to and reinforcement of the earlier advice to seek sectors of the environment “. . . where one sees the door more widely open.” [622,b]

Opportunity may exist in the environment where there are prospects for a mission multiplier effect. Ignatius advises that “Therefore preference ought to be given to those persons and places which . . . can spread the good accomplished to many others who are under their influence or take guidance from them.” [622,d] This is a long-standing Jesuit preference for serving the movers of society. Today, the language of “leadership” predominates in expressing this preference.

Many a Jesuit university expresses its mission as some form of “education for leadership in the service of others.” Designing programs and works that develop the knowledge and skills of future leaders or that enhance those of current leaders is strategically very much in keeping with this

Ignatian imperative to serve the influential in society. Serving current and future leaders directly creates a multiplier effect for the institution's mission.

Strategic planning cannot ignore aspects of the environment that are less than welcoming. Quite the contrary,

“... the Society ought to labor more intensely in those places where the enemy of Christ our Lord has sown cockle [Matt, 13:24-30], and especially where he has spread bad opinion about the Society or stirred up ill will against it so as to impede the fruit which the Society can produce.” [622,f]

Today's strategists may not often speak of “sowing cockle” as Ganss's translation renders it here but most would recognize Matthew's meaning.

This Ignatian criterion pertains to neighborhoods of the environment that may include hostile forces (“enemies”), “bad opinion,” “ill will” or otherwise “impede the fruit” and works of the Society. In other words, the aspects of the environment that represent threats. Threats may be religious, economic, political, social, or demographic. Whatever form they take, threats must be recognized so that the Society can therefore “labor more intensely.”

These threats ought not be intimidating. Quite the contrary, a threat to mission ought to inspire the institution to overcome the threat; to “undo the evil opinion founded on false reports.” [623,f] In the limit, this is Ignatian advice to turn environmental threats into opportunities, a useful strategic perspective for any *Magis*-seeking institution.

Ignatian planning underlines one aspect of the encounter with hostility and threats. Intense labor is especially needed “... if the place is an important one of which account should be taken . . .” [622,f] Which environmental threats are most “important,” i.e., represent the greatest obstacles to advancement of mission and works? What is the direct response to the most important hostile forces in the environment? How should the

environment be made more receptive to the mission and works of the Society?

### Distributing Resources

When considering resources, Ignatian strategic planning concerns itself almost exclusively with the human resource, i.e., the members of the Society. Other resources – physical, fiscal, information, . . . – must obviously be considered but this is not particularly Ignatius' concern.

The Ignatian model treats the members of the Society as a scarce (or at least limited) resource. For Ignatius, it is the members who are the heart of the work. For Jesuit colleges and universities, it is the faculty, staff, students, graduates, and benefactors – the people – who are the heart of advancing Mission and pursuing the *Magis*.

The resource question is raised early in Part VII. When “His Holiness issues the command to go somewhere . . .” “it is considered appropriate to ask “how he desires him to accomplish the journey and to remain in the institution.” [610-E] How shall we get the work done? How shall we deploy our members – our resources – most effectively?

Ignatius provides the superior with considerable guidance as to distributing those members in service of the Mission. The objective is “. . . sending to each place those who are more suitable and who will fit in better with the men and the work to which they are sent.” [624,a] A kind of litany of talents is provided, suggesting in each case the nature of the work for which that member would be best suited:

. . . subjects ought to be sent who are more select and in whom greater confidence is had . . . persons more strong and healthy . . . persons more approved in virtue and more reliable . . . members seem most suitable who excel in discretion and grace of conversation . . . those are more suitable who likewise have a special gift of skill and learning . . . those will generally be most apt who have talent for preaching, hearing confessions, and the like. [624,a-f]

Applying this Ignatian advice is less straightforward than some other elements of the model. Criteria pertaining to qualities such as “virtue,” “grace of conversation,” and “talent for preaching” are less obviously relevant to current-day issues. Still, resonance is there.

If we focus on the Founder’s intent, we can craft a set of questions that flow from these *Magis* principles and are useful for strategic human (and other) resource planning.

- Which resources merit “greater confidence”; which less? [ala 624,a]
- Which resources are in the best condition; which are less than completely “strong and healthy”? [ala 624,b]
- Which resources are “more reliable”; which less so? [ala 624,c]
- Which human resources best represent the institution’s mission, “excel in discretion and grace of conversation”? [ala 624,d]
- Which human resources are most equipped with the specific “skill and learning” required for the work? [ala 624, e]
- Which human resources are the most eloquent; have a “talent for preaching” or teaching? [ala 624,f]

Ignatius also guides the superior as to the advisability of assigning groups of members rather than only single individuals. We might speak today of the utility of teams or the value of a multi-dimensional approach to the deployment of resources. Here Ignatius essentially argues for a mixture of balance and diversity. Balanced teams allow the members to proceed “. . . by distributing among themselves the labors in the service of their neighbor, be more profitable to those to whom they are sent.” [624,g]

The rookie should be paired with the old hand; the daring with the cautious; other combinations utilized in order that “. . . the diversity may, when united by the bond of charity, be helpful to both of them . . .” [624,j] The superior is at leave to

increase the size of teams but if and only if this can be done “. . . without prejudice to other things conducive to greater divine glory and universal good . . .” [624,k] Here again, Mission and *Magis* remain paramount.

Ignatius has relatively little to say about the other resources that may enable or constrain the mission and works of the Society. Writing of the places where the members are to be sent and the work they are to do there, he does note, for example, “. . . the spiritual goods ought to be preferred to the bodily, the matters of greater perfection to those of less, and the things more good to those less good.” [623,b] Which resources are “more good” – more useful – and which are “less good” – less effective?

Similarly, which resource applications are “more urgent”? [623,c] Or which resources are the most reliable; “. . . are safer for the one who cares for them . . .”? [623,e] When some resources “. . . are easier and more quickly dispatched and others are more difficult and finished only in a longer time, the first should be similarly preferred to the second.” [623,e] Which resources are most flexible and can be applied most quickly?

Both speed of execution and degree of difficulty relate to questions of efficiency and productivity. The quicker option is likely to be the more efficient; the more productive; the better use of resources; the better strategic choice. As always, *ceteris paribus*.

Of course, efficiency in the use of resources must be embedded in the full set of strategic considerations and not allowed to assume disproportionate importance. It is possible, after all, to achieve maximum efficiency and still be proceeding in the wrong direction. This is yet another example of maintaining the broad view; of remembering the interrelatedness of the *Magis* principles.

Today’s planners might well take a lesson from Ignatius’ unswerving attention to the people resource. Unedited, he seems to be saying that if the people – the Society’s members – are well placed in service of the Mission, other resource details will fall into place. This represents, among

other things, an implicit separation between planning and budgeting.

As the strategic plan unfolds, do not allow fiscal issues to prematurely constrain ambitions and possibilities. Rather, ensure that Mission, *Magis*, and people drive the planning process. As the plan emerges, then proceed – most likely in iterative fashion – to bring financial resources into the picture. As this happens, adjust the particulars of the strategic blueprint as necessary. In the end, the budget should be a consequence of the plan, not a set of constraints that stifle its vision.

A final piece of advice completes the resource considerations of the Ignatian strategic planning model:

Wherever anyone is stationed, if he is not limited to the use of some means such as lecturing or preaching, he may use the means which he judges more suitable among those which the Society employs. [634]

This is the Ignatian way of calling attention to the necessity of examining *all* the institution's resources as part of the planning exercise. And the utility of not being "*limited*" at this stage in considering which resources are "*suitable*" for a given application. Implicit in this advice is the caution not to be bound by previous or initially chosen paths toward furthering Mission. Resources must be creatively and comprehensively employed as the plan proceeds to fruition.

### More Lasting Value

We close where we began: the Ignatian strategic plan endures.

Ignatius does not neglect the long-term nature of strategic planning. Indeed, a long-term perspective permeates the *Constitutions*. The enduring nature of the Ignatian plan has been ratified by the passage of time. Four and a half centuries after the first version of the *Constitutions* was created, the Society still flourishes under the guidance of that original plan. (Not without multiple challenges and even detours along the way but that's a story for another time.) In a very real sense, the model identified here may be seen as a direct ancestor of

the strategic plans of today's Jesuit colleges and universities.

The Ignatian model does, however, take a distinctive approach to the question of planning horizon. The Founder does not follow the common approach of stating the planning horizon in terms of multiple years, multiple budget cycles, or multiple whatever. Rather, the work itself – the substance of the plan – is the principal determinant of the planning horizon.

The most direct statement of the long-term Ignatian perspective comes from the text of Part VII:

Similarly too, when there are some spiritual works which continue longer and are of more lasting value . . . and other works less durable which give help on a few occasions and only for a short while, then it is certain that the first ought to be preferred to the second . . . since that is a greater service to God and a greater good for our fellowmen. [623,g]

The planning horizon is not defined as a period of time or some temporal distance from the present moment. Instead, the focus is on the actions of the plan; the works "which continue longer and are of more lasting value." [623,g] In the end, this may be the real secret of a strategic plan that endures.

### Conclusion

So. Ignatian strategic planning is fully charted. The model is summarized schematically in Figure 2.

Recall that the essence of strategic planning includes four dimensions: organizational mission, environmental understanding, resource assessment, and long-term horizon. The Ignatian model detailed in the *Constitutions* richly addresses each of these essential components.

The global Mission – Ad Majorem Dei Gloriam – is particularized in terms of greater need and greater fruit and then integrated with the *Magis* – the pursuit of the more universal good. Together, Mission and *Magis* provide foundation, context, and inspiration.

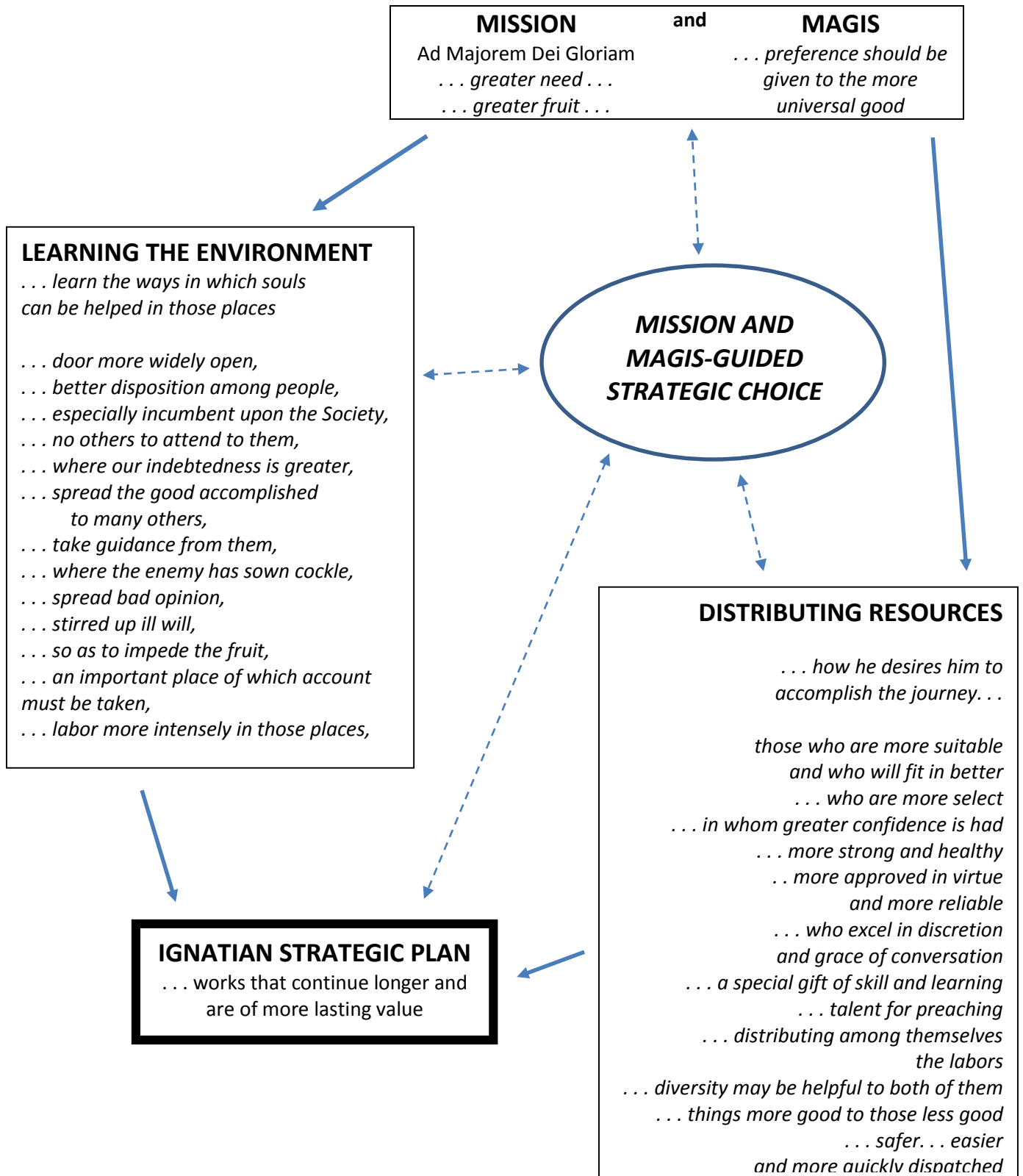


Figure 2: Ignatian Strategic Planning

Environment is learned so as to reveal “the ways in which souls can be helped in those places.” [636] Both opportunities and threats found in the environment are revealed through an extensive set of guiding principles inspired by the *Magis*.

Resources, especially human resources, are guided toward the best way to “accomplish the journey.” [610-E] The members of the Society – its people – are at the absolute center of the resource assessment process.

The planning horizon is defined in terms of the substance of the plan and the work rather than some time-bound specification. The entire planning exercise is characterized by focus on “. . . works which continue longer and are of more lasting value.” [623,g]

This is the making of the strategic plan found in the *Constitutions of the Society of Jesus*. This is the fruit of planning guided by Mission and enhanced by *Magis*. This is Ignatian strategic planning – “the practical wisdom of an apostolic organizer.”<sup>14</sup>

## Thanks

As is the case with any ideas that endure more than briefly, the observations presented here have multiple roots. This author has long personal experience in the Jesuit tradition of higher education – eight years as Jesuit secondary and collegiate student and nearly thirty as academic dean, vice president, and provost at a Jesuit college growing into a university. Both Ignatius and strategic planning were part of those rich experiences.

The *Constitutions of the Society of Jesus* are clearly the essential resource. Their masterful translation by George Ganss, S.J. played an obvious and crucial role. All the authors and works listed among the references were helpful, most especially Bart Geger, S.J. and his paper “What *Magis* Really Means and Why it Matters.” All have the author’s deep thanks.

Most importantly, this author matured in Jesuit work as part of the leadership team of David M. Clarke of the Society of Jesus. As the long-time president/chancellor of Regis University, the late Father Clarke was unrelenting in pursuit of both

Mission and *Magis*. This simple work is dedicated to his memory with love and gratitude. HJE

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Notes

<sup>1</sup> E. George Ganss, S.J., *The Constitutions of the Society of Jesus*, (St. Louis: Institute of Jesuit Sources, 1970), 27.

<sup>2</sup> Ibid. Unless specifically noted otherwise, all references to the Constitutions and excerpts from the text are taken from this Ganss translation of the Constitutions.

<sup>3</sup> *Constitutions* 623, g (Ganss, *Constitutions*, 276) Unless specifically noted otherwise, all further citations of the form [6xx, y] are from Part VII of the Constitutions (Ganss, *Constitutions*, 267-284). Henceforth, specific page numbers for these citations are not individually noted.

<sup>4</sup> Ganss, *Constitutions*, 35-6.

<sup>5</sup> Chris Lowney, *Heroic Leadership: Best Practices from a 450-year-old Company that Changed the World* (Chicago: Loyola Press, 2003), 105.

<sup>6</sup> Ganss, *Constitutions*, 37.

<sup>7</sup> *Constitutions*, Part VII (Ganss, *Constitutions*, 267-284).

<sup>8</sup> Barton T. Geger, S.J., “What *Magis* Really Means and Why It Matters,” *Jesuit Higher Education: A Journal* 1, no. 2 (2012):16-31.

<sup>9</sup> All text excerpts in Figure 1: Ignatian Guidance Concerning Distributing Members of the Society are from Part VII of the Constitutions as found in Ganss, *Constitutions*, 274-276.

<sup>10</sup> Geger, “What *Magis* Really Means,” 18.

<sup>11</sup> General Congregation 34 of the Society of Jesus (1995) , Decree 26, Note 26.

<sup>12</sup> Lowney makes this observation about the linkage of Mission and *Magis* in the life of the individual Jesuit. “Jesuits are exhorted to always ‘choose and desire’ the strategic option that is more conducive to their goals.  
... That detail comes as each recruit mentally shapes the mission and the *magis* to his circumstances, not only during the Exercises but throughout his life.” Lowney, *Heroic Leadership*, 121-2.

<sup>13</sup> All text excerpts in Figure 2: Ignatian Strategic Planning are from Part VII of the Constitutions as found in Ganss, *Constitutions*, 276-278.

<sup>14</sup> Ganss, *Constitutions*, 27.