

Management, Change, Strategy and Positive Leadership

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**Daniel E. Harris · Lori Holyfield ·
Linda Jones · Rhonda Ellis ·
Judi Neal**

Spiritually and Developmentally Mature Leadership

Towards an Expanded Understanding of
Leadership in the 21st Century



Springer

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of Leadership in the 21st Century



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We dedicate this book to emerging leaders who are seeking greater meaning, purpose and spirituality in their work; and to those who are committed to developing the next generation of wise and compassionate leaders.

Preface

Why Do We Need This Book?

This book starts from the assumption that most current models of leadership are inadequate to meet the challenges of the mid-twenty-first century. It is particularly crucial to prepare emerging leaders for the challenges they will face in coming decades marked by the relentless acceleration of complexity, diversity, and technological change. The world is growing in complexity and speed far more rapidly than our society is producing leaders with the mental complexity and agility to respond effectively. More techniques for “coping and dealing” will not suffice: we need “bigger minds” (Kegan and Lahey 2009). Current leadership training relies heavily on teaching leaders through theories, models, interpersonal skills, and competencies. Relying on the competency model to prepare leaders is liked adding more and more sophisticated software to the same hardware: at some point, the hardware will slow or even crash (Petrie 2014).

Two recent leadership books offer refreshing approaches to dealing with complexity at speed. Lt. General Stanley McChrystal commanded special operations in Iraq and Afghanistan in the early 2000s. To cope with the rapidly shifting demands of counter-insurgency in hostile terrain, he developed an operation based on “shared consciousness” and “radical delegation”, which allowed lower ranking soldiers near the point of action to take decisions, some with potentially far-reaching consequences (McChrystal 2015). Interestingly, Lowney (2003) describes a very similar approach taken by Ignatius Loyola in the sixteenth century when he founded the Jesuits. While McChrystal makes no mention of spirituality, the Jesuits were deeply grounded in spiritual practices. McChrystal had instant communications with any point in the world whereas Loyola might not hear from his far-flung Jesuits for months or years at a time. Both leaders needed subordinates to take decisions on the ground without specific direction from the top. Though Loyola used different terms, he and McChrystal both relied on “shared consciousness” and “radical delegation”. Both leaders commanded elite, highly trained, diverse forces of intensely dedicated, often young, individuals. Very few modern

organizations can boast of such elites, any more than McChrystal's Joint Special Operations Command represented the U.S. Army as a whole.

One purpose of this book, then, is to explore capacities in leaders—especially emerging leaders—that will enable them to face unprecedented complexity, diversity, and speed in the coming decades. We believe the cultivation of spiritual maturity in leaders, *at all levels*, opens capacities in individuals to create organizational cultures that build the resilience, trust, and shared consciousness required to respond wisely and rapidly to accelerating changes in our world.

Andre Delbecq devoted the last 20 years of his career to exploring the added value of spirituality to leadership, and it was he who created the heuristic of a “spiritually and developmentally mature leader.” But a heuristic is like a brainteaser—it points one's thoughts in a certain direction but with no definitions or further guidance. Above all, a heuristic generates questions. Indeed, the deeper one explores a heuristic, the more questions may arise. For example:

What is the added value of spiritual maturity to an already competent leader?

Can we distinguish spiritual maturity from the skills, wisdom, and insights our better leaders acquire from experience?

Even if we can articulate some added value from spiritual maturity, what qualitative and quantitative impacts would it bring to individuals and organizations?

Given that we do not have widely accepted definitions for “leadership”, or “mature”, or “spiritual” or “spirituality”, how do we articulate a coherent description of “spiritually mature” in a leadership context?

Are spiritually mature leaders born, or are they made? In other words, is spiritual maturity a capacity that emerges from a set of inborn personality traits, and is therefore available to some leaders but not others?

Finally, how would one go about forming spiritually and developmentally mature leaders in a secular, pluralistic society where the very notion of “formation” may be regarded with deep suspicion? How would one overcome the apprehensions of current leaders to encourage spiritual growth in workplaces, where spirituality is often conflated with religion and therefore deemed a purely personal preference like following a professional sports team?

What would a process for training/forming spiritually and developmentally mature leaders look like? What would it demand of current leaders? What methods and tools already exist? What are the risks versus benefits of creating such a program?

This book does not provide comprehensive answers to these questions—but it does shine considerable light on a path for exploring them.

Founded on the distilled wisdom of thirty scholars and practitioners who explored Delbecq's heuristic (May 16–17, 2017), the book includes insights from the fields of psychology and leadership and tells three stories that illustrate the impact of spiritually and developmentally mature leaders on individuals and organizations. The penultimate chapter offers opportunities, methods, and tools for

application of these concepts by both scholars and practitioners. The final chapter adds important insights that were not included in the data analysis chapters, and some concluding thoughts that include responses to questions posed above.

This book is a beginning, not an end.

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As with any undertaking to expand the boundaries of a domain as complex as leadership, we acknowledge many contributors of both ideas and resources.

Professor Andre Delbecq provided the heuristic of spiritually and developmentally mature leaders, but more importantly, he provided the inspiration that drew together 30 very accomplished people as explorers in common.

The 30 participants in the retreat brought their ideas, observations, intuitions, and their expertise from their respective fields. They shared these contributions in a spirit of openness, mutual respect and a passion, in order to reframe our notion of leadership to take account of the whole person, including spirituality. Taken together, their collective wisdom is the foundation of this work.

Mr. John Tyson of Tyson Foods founded the Tyson Center for Faith and Spirituality in the Workplace. As a business leader, he recognized the importance of spirituality at work and pioneered a multi-faith workplace. He also contributed generously to this retreat.

The Tyson Center for Faith and Spirituality in the Workplace, at the Sam M. Walton College of Business, University of Arkansas, organized and hosted the Delbecq Retreat.

The Advisory Board of the Tyson Center for Faith and Spirituality in the Workplace wrestled with the practical applications of Andre Delbecq's challenging heuristic and shaped the questions examined by participants at the Delbecq Retreat.

Donors to the Delbecq Retreat included Fadil Bayyari of Bayyari Properties, Todd Simmons of Simmons Foods, and Earvin Young of Sam's Club.

Three facilitators from the Ministry Leadership Center brought their expertise in the Nominal Group Technique as well as their experience of working with Andre Delbecq to provide structure and sensitive guidance throughout the day.

The Research Team diligently reviewed and analyzed the contributions of participants before and during the retreat. They also reviewed and synthesized academic and organizational literature to place retreat findings in a larger context. Not least, they brought their own expertise, insights, and passion to interpret retreat

findings and to imagine possibilities for further research and application. William McCready assisted with data analysis.

Three experts in leadership provided important feedback on the penultimate draft of the manuscript. The insights and comments of Jody Fry, Laurence O'Connell, and Chris Reina enabled the Research Team to see the work with fresh eyes and broader perspectives in its final stage of preparation.

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Chapter 1

Introduction and Summary of Themes



Background

A few years before his death in October 2016, Prof. Andre Delbecq (University of Santa Clara) created a heuristic around “spiritually and developmentally mature leaders” in order to stimulate a more expansive understanding of leaders and leadership. He had observed that outstanding leaders often seem to draw strength and wisdom from sources that are not typically studied or taught in leadership courses. He referred to such leaders as “spiritually and developmentally mature,” but without defining his terms.

A group of 30 scholars and practitioners gathered in Fayetteville, Arkansas on May 16–17, 2017 to explore this heuristic, employing the “Nominal Group Technique.” The group accepted Delbecq’s heuristic as the starting point to develop a more complete understanding of leadership—one that looked at spiritual components that do not lend themselves to quantification or clear causal links, and their relationship to established developmental traits. Participants recognized themselves as explorers in common, seeking to move toward an understanding of leadership better suited to meet the current and future challenges of an increasingly complex and fast-changing world. Exploring a heuristic allows participants to draw freely on their experience and knowledge without having to prove anything, or to hold any expectation of finding an optimal solution.

The Delbecq Retreat brought together a diverse mix of academics, chaplains, and business people, yet there was a shared passion and understanding that blurred the distinctions between practitioners and scholars. Each participant had sacrificed other important work to engage in these intensive conversations. Anecdotal feedback from participants indicates that their experiences in this retreat changed the way they understand their working lives, especially their outlooks on spirituality and leadership.

The seeds for this book come from the findings that resulted from the Delbecq Retreat. It builds, however, upon the data by constructing a larger picture of the literature on spirituality and leadership. We, the authors, offer our analysis of the participants' observations and intuitions, and draw upon research literature that supports or expands upon our findings. Together with the growing interest among academics and practitioners in the added value of spirituality to the workplace, this research enables us to validate these findings as more than just opinions of one group of people on a given day.

Summary of Themes

Several overarching themes run through the findings. Taken together, they provide a coherent shape to the musings, observations, and intuitions that surfaced at the retreat.

The distinguishing feature of a spiritually mature leader is an active inner life, based on regular contemplative or mindful practices that enable him/her to transcend ego and connect to a sense of higher purpose beyond serving one's own ego needs. It is this transcendence of personal ego that is the *sine qua non* of a spiritually mature leader. From this inner life and practice emerge the salient traits we associate with spiritually mature leaders.

A disciplined inner life does not inevitably result in spiritual maturity; spiritual practices can be intended to produce results that serve, rather than transcend, the ego's desires. For example, a practitioner of martial arts might have a rigorous "inner life" based on meditation and other inner practices, but if the desired outcome is to win championships, there may be little transcendence of personal ego needs and consequently limited fruits to share with others. Intentions matter. Having said that, an inner life that makes space for reflection tends to be transformative.

In virtually every session, both academics and practitioners observed that honest reflection and regular spiritual practices constitute the rich soil that nourishes a spiritually mature leader. The term "inner life" includes spiritual practices such as (but not limited to) prayer, meditation and mindfulness exercises that lead to open-ended reflection, transformation and a sense of connection to something greater than oneself.

Spiritually mature leaders may or may not participate in religious communities or believe in a supreme being; but they do connect to "transcendent mystery" (Delbecq's term), which brings the leader a sense of connectedness to something greater than oneself. This may be a divine being, the universe, nature, music, family, a profession and/or a sense of one's own place in the sweep of history, among others.

In order to serve a greater good, the spiritually mature leader must be willing and able to translate the fruits of inner growth to the outer world. These inner fruits manifest outwardly as the salient characteristics we associate with spiritually mature leaders. Participation in transcendent mystery enables a spiritually mature leader to manifest a characteristic disposition of humility—for example, a recognition that

he/she needs to be open to more than what one can grasp with the intellect alone; and, by extension, that one has limitations that can be complemented by others. Such humility is also associated with compassion and service to others, the containment of self-importance, and encouraging leadership in others. A spiritually mature leader may also manifest a willingness to take personal risks for a greater purpose. As retreat participants repeatedly emphasized, spiritually and developmentally mature leaders incorporate the fruits of their inner growth into the service of their communities.

A sense of peace under stress, and the ability to retain one's balance, even in the stressful circumstances of our very hectic 24/7 world, are seen as qualities of spiritually mature leaders. This sense of peace does not imply immunity to stress, rather a sense that the individual is not spiraling out of control in the cauldron of pulls, demands, and conflicts. It includes an ability to see oneself within the context of longer time frames or expanded event horizons.

These qualities that flow from a deep inner life and an awareness of transcendent mystery lead to qualitatively and quantitatively different outcomes in both the individual and organizational domains. This is partly because spiritually mature leaders typically articulate transformative, far-reaching goals for the organization; but, also, because positive organizational outcomes result from better decision making, that, in turn, rests upon an ability to take a holistic, long-term view, to remain calm in the midst of turmoil, to hold paradox, to seek deeper insights from non-conforming information, and so on.

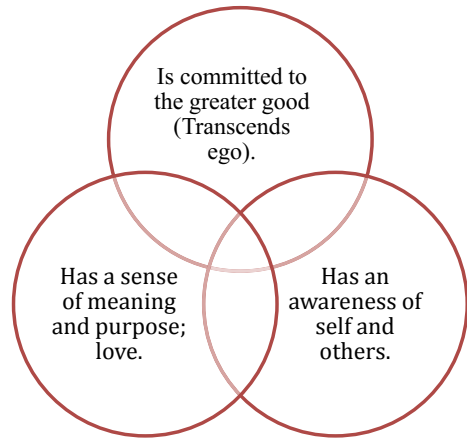
Spiritually mature leaders cultivate cultures that celebrate creativity, trust, community, and personal/professional growth. "Trust" was one of the most frequently used words in the retreat. Participants and literature reviews point to the stress and burnout that comes from fear-based motivations vs. the flourishing that can occur in an environment of faith and trust. This is especially crucial for the spiritual development of emerging leaders who need trusted mentors and reflective exercises that encourage mindfulness.

The formation of spiritual maturity in emerging leaders demands a great deal from current leaders. Developmental traits and technical skills can be taught by didactic methods, but spiritual growth requires mentors and role models who will build trusting relationships that permit deep sharing. This, in turn, requires a degree of openness and humility that may be uncomfortable for current leaders. Thus, spiritually and developmentally mature leaders intentionally create a culture that promotes trust, creativity, and transparency *at all levels*.

Emerging leaders can thrive in such cultures, especially when current leaders avoid creating replicas of themselves in favor of developing the unique gifts and styles that emerging leaders will need to face the challenges of their own time in history.

We recognize that spiritual and developmental traits are not mutually exclusive, but flow along a continuum; i.e., that certain traits we associate with spiritually mature leaders may also be practiced by developmentally mature leaders. We understand developmental traits to be those that can be learned and practiced using the intellect and emotional techniques, even with no discernable inner life. We posit, however, that skills and qualities such as active listening, empathy or far-sighted goal setting,

Fig. 1.1 Characteristics of spiritually and developmentally mature leaders



can be enhanced and elevated to a significantly higher level in leaders who are both spiritually and developmentally mature. Further, the key characteristics of spiritually and developmentally mature leaders (as articulated by retreat participants) must work together in mutually supportive ways. These characteristics are:

- Is committed to the greater good (transcends ego);
- Has a sense of meaning and purpose/love; and,
- Has an awareness of self and others, and the relationship between the two.

We posit that none of the three key characteristics identified by retreat participants can stand alone. Each characteristic needs the others; and all necessarily overlap as illustrated in Fig. 1.1.

Having said all of this, a crucial question remains: *What is the added value of spiritual maturity to a developmentally competent leader?*

In other words, if a talented leader has rigorously trained him/herself in technical skills and modern leadership practices, including emotional intelligence, how would spiritual maturity lead to different outcomes? Scholars in the psychology of religion (Pargament 2013; Piedmont 2012) have found that spirituality is a non-reducible human trait, which adds a dimension to personality analysis and should be considered the sixth factor in the Five Factor Model (used by psychologists to assess personality traits). Their findings on spirituality and the impact of spiritual transcendence align closely with many of the observations and intuitions of retreat participants; and they provide empirical evidence from the field of psychology that a developed capacity for spiritual transcendence may lead to qualitatively and quantitatively different outcomes (see Chap. 3).

We have not provided a definitive answer to the added-value question in this book, but we have posited that spiritual maturity combined with technical (developmental) mastery leads to qualitatively and quantitatively different outcomes in both human and organizational terms. We must note that value judgments (e.g., “better” or “more positive” outcomes) depend upon the criteria used. Nevertheless, we return to our

premise: that rapidly increasing complexity and speed require leaders to employ all their capacities, including their spirituality, to face the awesome challenges of the twenty-first century.

Finally, the rich data emerging from the retreat promises far more than the research team can provide in this book! Our analysis of the insights and ideas that surfaced from retreat participants is intended primarily to stimulate further thinking in our readers. Many questions are left unanswered and new ones are posed. For this reason, we are already planning further retreats on related topics. Participants in this first Delbecq Retreat explored the heuristic; the research team analyzed their thinking and added some conceptual constructs as presented in this book. We encourage scholars and practitioners to build upon those constructs. We hope teachers and practitioners will be inspired to experiment with new approaches to leadership training. To that end, we include in this book ideas for further research and application—including the notion of a “toolkit” for the formation of spiritual leadership (Chap. 10).

We warmly invite readers to use whatever they find of value to expand our understanding and practice of leadership!

Overview of This Book

This layout of this book allows readers to approach the material in a logical order, or selectively, according to their particular interests. The four broad segments of the book are

- The background and introduction of main themes (Preface—Chap. 2);
- The data and analysis, beginning with the literature review (Chap. 3), followed by a summary and analysis of retreat outcomes for each of the six questions/statements (Chaps. 4–9);
- Concepts and tools for application and further research (Chap. 10);
- Concluding Thoughts (Chap. 11) summarizing material relevant to the questions posed in the Preface, plus other important material that supports or elaborates on themes from the retreat.
- Appendices provide further detail for researchers and links to extensive resources.

In short, Chaps. 4–9 focus on the methodology and actual data and language emerging from the retreat (e.g. the top three items that were voted on by participants in each of the forums and plenaries). The chapters that follow the retreat data analysis incorporate other very important themes that arose during the retreat (e.g., the central role of community) or came up during our research (e.g., insights from the psychology of religion). We consider this material highly relevant for further research and application, but want to distinguish between data emerging from the retreat and supporting material.

In the Preface, we describe our purposes in preparing this book, namely that we find current models of leadership insufficient to meet the challenges of the twenty-first century because these models rarely engage the spiritual capacities of leaders. We

acknowledge that our exploration of Andre Delbecq's heuristic raises questions that are only partially answered in this book; nevertheless, we posit that the insights from the Delbecq Retreat shine considerable light on a path to more holistic leadership models that will yield more positive outcomes for individuals, communities and the society at large.

This chapter provides a brief outline of the Delbecq Retreat and summarizes the principal themes—including an overview of the distinguishing characteristics of a spiritually and developmentally mature leader. We begin to explore the added value of spiritual maturity to a developmentally competent leader; and posit that spiritual maturity combined with technical mastery will produce quantitatively and qualitatively different outcomes from a leader with technical mastery alone. Readers looking for an executive summary may start here.

Chapter 2 begins by stating our objectives for this book. Our first aim is to report on the findings of the retreat, which we place in the context of a literature review. Second, we want to move beyond the exploration of a heuristic towards the formulation of conceptual constructs and practical skillsets that we believe will be useful to scholars and practitioners in creating more holistic models for twenty-first century leadership. “The origins story” relates how the retreat came about under the inspiration of Andre Delbecq, even after his death in October 2016. Chapter 2 also offers two definitions of a spiritually and developmentally mature leader, formulated by retreat participants. A description, based on conversations with Delbecq and others, fleshes out the picture of a spiritually and developmentally mature leader.

The literature review in Chap. 3 is divided into four topic areas: (1) Andre Delbecq's Work on Spiritually and Developmentally Mature Leadership, (2) Developmental Models of Leadership, (3) Spiritual Leadership and Workplace Spirituality and (4) Insights from the Psychology of Religion. Each of these sections provides a rich context for the outcomes of the Retreat, often adding perspectives and support for the overarching themes stated in this chapter. Some of the key insights are cited again in following chapters. To avoid overwhelming the reading with broad surveys, the authors stayed focused on the most directly relevant literature, but cited more extensive reviews for readers who want more.

Chapter 4 provides a deeper look into the methods and approaches used at the Delbecq Retreat, including the origin of the six questions/statements considered, the selection of the Nominal Group Technique (NGT), the demographics of participants and the research methods employed. This chapter elaborates on the use of Delbecq's heuristic as the focal point of the Retreat, and provides further information on the research team that analyzed the data that emerged.

Chapters 5–9 present the data that emerged from the Retreat and the analysis by the research team. Each chapter follows a similar (but not identical) structure: background, a summary of findings (the top three ideas chosen by participants), the elaboration and analysis of those findings (including illustrative verbatim comments by participants). An NVIVO analysis of frequently used words and graphics such as a word cloud or word tree provide additional perspectives on the outcomes.

Two exemplar narratives (as parts of Chaps. 5 and 7) take us from theory to real life. Both of the exemplars are foreign-born, American entrepreneurs who manifest the

qualities, skills, and competencies of spiritually and developmentally mature leaders. Neither are household names but both have made very significant contributions to their communities, both personally and professionally. These stories add texture to the findings.

Recommendations For Research and Application (Chap. 10) is an ambitious chapter oriented towards applying the concepts presented in this book to the workplace. The first section begins with theoretical underpinnings, then references works on leadership formation (especially Delbecq) and looks at obstacles to implementation, especially the fear that arises from conflating religion and spirituality. The second section surveys a specific organizational behavioral model, lists assessment tools for leadership formation, and outlines a pilot project for leadership formation in a secular workplace. The third section poses a series of questions designed to stimulate further research. Most of these questions have a pragmatic bent that makes them suitable for inter-disciplinary and/or practitioner/academic collaboration.

The final chapter—Concluding Thoughts—brings in material that speaks to the questions posed in the Preface. We do not pretend to provide definitive answers to these questions, but to highlight what we have learned in the process of analysing retreat outcomes and searching the related literature. In addition, we point to very important themes that ran through the Retreat, and are supported in the literature, but which did not rise to the top three responses to the questions/statements. Community and Spiritual Transcendence, in one form or another, were present in every discussion. We end with a call to action.

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