Three Popes: Lessons in Leadership

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**Three Popes: Lessons in Leadership**

*The Powerful Learnings of Predecessors in Developing One’s Own Leadership Style and Approach*

**An Experiential Exercise**

February 21, 2022

**Abstract**

As educators, we seek engaging ways to demonstrate how crucial leadership is to advancing organizational success. This exercise uniquely emphasizes how much leaders can learn from their predecessors in the same role. Participants explore leadership by researching two former Bishops of Rome—John Paul II and Benedict XVI—and the incumbent pontiff, Francis. They investigate personal traits, biographies, and accomplishments of each pope in order to understand each leader’s style and effectiveness. The exercise can be adapted to other contexts where executive leadership is essential. The aim of this exercise is for participants to make recommendations to Pope Francis—using situational data of his predecessors. In doing so, the exercise creates perspective for how participants might enhance their own leadership skills within their own professional organizations.

**Keywords:** leadership, popes, leadership effectiveness, executive leadership, leadership behavior, leadership communication, class exercise
Educators continually seek to present leadership concepts that resonate with students and contribute to their development as future leaders. We offer here an exercise where students’ reflections about leadership are paramount. The activity’s uniqueness is its focus on leader sets in the same organization, and how the study/reflection of predecessors may be valuable to a new leader. The leader sets are in some ways incidental, yet provide interesting storylines. Leaders, of course, should never be captive to their predecessors’ agendas or approaches. On the other hand, new leaders may arrogantly reject leadership lessons of their predecessor(s) to their own peril. A leader desiring to enhance their organization’s success ideally would take counsel from various sources, including the lessons she/he can learn from their predecessors. We feature in this exercise Pope Francis as a current leader who might gain valuable leadership advice by reflecting upon his predecessors’ legacies.

Exploring the leadership styles, accomplishments, disappointments of John Paul II (Karol Wojtyla), Benedict XVI (Joseph Ratzinger), and Francis (Jorge Bergoglio) illustrate many leadership themes. Yet popes are not representative of all leaders, being all men, belonging to the same religious faith, and having taken vows of celibacy. Nonetheless, popes have executive leadership responsibility which can reveal leadership excellence or missteps. Popes oversee a complex and international organization—one that must be relevant to myriad stakeholders. The modern Church cannot afford to be static. It has survived rather well for two thousand years notwithstanding the occasional schism, scandal, and fluctuations in Church attendance. In business, “built to last” enterprises seldom endure longer than a hundred years.

Through an assignment hypothetically commissioned by Pope Francis, participants evaluate three popes’ effectiveness as leaders of the Church to better understand how their life stories/“roots,” the historical context within which they operated, their communication and
leadership styles, and even how the selection of their names presaged what each of them viewed as their leadership priorities.

Distinguished from leaders in other fields, popes are unique—being elected for life. How they are perceived and the initiatives they advance have a profound effect on the Church as a social institution. Popes also start out with built-in “followers,” having been elected by their peers, the College of Cardinals. This doesn’t mean that internal stakeholder groups necessarily are willing “followers,” nor does it imply that each cardinal is an ardent supporter of a newly-elected pope. But popes begin their leadership responsibilities with considerable goodwill, which is not always the case when “new management” is brought on board or when there is a leadership change in government.

*Three Popes* deals with challenges two popes faced or Pope Francis is facing in leading the Roman Catholic Church—an organization trying to maintain relevance in a fast-changing world characterized by globalization, 24/7 news coverage, divergent social viewpoints, and an array of new communication avenues. Those challenges have included how the Vatican should exert influence in matters like:

- regime change, human rights, eradication of poverty, terrorism, immigration/refugees, climate change;
- social controversies such as same sex marriage, capital punishment, euthanasia;
- the role of women in the Church; and
- sexual abuse of minors by priests and cover-ups by bishops.

While the Church remains relevant to large swaths of the world population, its sustainability can be threatened if its lifetime-elected leader lacks leadership skills perceived as appropriate for the concerns of his tenure. The ability to pivot is crucial as this example illustrates.
‘Isolated Pope Francis Faces Yet Another Setback in Pandemic’ reads a headline article from *The Wall Street Journal* on July 7, 2020, noting, “… the lack of public events and personal interactions are particular burdens for a pope who is more at home communicating with crowds than in dealing with the Vatican’s bureaucracy.” The article further discusses the impact of COVID-19 on the solvency of the Church with decreased tourism, lack of public outreach events, and a resurgence of scrutiny over the abuse scandals and victim compensation. (Rocca, 2020, July 7). Immediately thereafter in August 2020, Pope Francis announced two papal initiatives: 1) a series of catechesis on the COVID-19 pandemic, accessible digitally on multiple platforms to address the urgent issues highlighted by the pandemic, particularly social diseases like poverty, wage inequity, and racism (Gomes, 2020) and 2) the appointment of six women to the Vatican’s fifteen-member, previously all-male Council for the Economy—making these women the most senior female officials ever to serve at the Vatican. (Rocca, 2020, August 6). Pope Francis thereby pivoted his leadership style—embracing digital platforms to communicate his social messages amid the pandemic and welcoming diverse voices to better address the Vatican’s planning. While doing so, Pope Francis did not abandon in-person and risky, travelling to Iraq to forge closer bonds with the Muslim world. (Horowitz & Arraf, 2021).

We believe the next pope, political leader, or CEO can benefit by reflecting upon situations and leadership approaches of their predecessors. We recognize new leaders do not always build upon a predecessor’s legacy or seek guidance or inspiration from past leaders. New leaders often pursue different agendas or leadership approaches. But if they care to, the lessons of history can be compelling and informative to a leader’s own legacy.

**Learning Goals and Target Audience**

The *Three Popes* activity and debriefing should enable participants to:

- gain knowledge of the lives and leadership styles of the three most recent popes;
Leadership

- compare and contrast their leadership styles and effectiveness—within the historical context;
- provide leadership recommendations to Pope Francis based on what he might learn from his predecessors; and
- reflect how they might enhance their own leadership skills after studying these leaders and related leadership concepts.

While developed for graduate students studying leadership at a Catholic university, we see no reason the exercise cannot be used at a secular university. Non-Catholics seem to perceive the Pope as an international leader—similar to how an American president is perceived outside the United States.

Overview of the Exercise

In *Three Popes* participants assume the role of global leaders. Participants are given instructions (Appendix A) to act as advisors to Pope Francis to better understand how to navigate, connect with, and advance his mission with the Church bureaucracy, the laity, and non-Catholics. Using the *Papal Archives* as a starting point, participants are encouraged to compile information on each pope—assembling data on personal attributes, professional style/effectiveness, historical context, and examples of each pope’s leadership style through quotes and actions. A suggested template for collecting this data is provided in Appendix B.

For facilitators, we have included supporting materials including: a description of the exercise logistics/materials needed (Appendix C) and step-by-step instructions for running the exercise (Appendix D).

The experiential aspect of the exercise is analyzing the data, consulting with teammates, and making recommendations to the theoretical client, Pope Francis. To that end, we suggest
resources for: leadership (Appendix G) and papal biographical sources (Appendix H). While teams should conduct independent research, providing concrete starting points via suggested resources ensures more baselined continuity in the approach to the exercise.

This exercise involves in-class time (for initial team discussions, presentation of team advice to Pope Francis, and class debriefing) and outside class time (for team research and preparation), as follows:

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<td>Stage #6: Discussion and debriefing</td>
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**Variations**

The exercise might be conducted with minimal revision focusing on United States presidents or other national leaders, leaders in a particularly large complex organization (such as Apple, Disney, or General Electric), or leaders in a particular industry (such as the automotive industry). The only requirement would be that information about the leaders is publicly available for the participants to explore.

An interesting set of business leaders might be the current General Electric CEO Larry Culp and some of his predecessors: John Flannery, Jeffrey Immelt, and Jack Welch. An interesting set of public servants—besides the United States presidents—might be the current
Prime Minister of Great Britain, Boris Johnson, and some of his predecessors: Theresa May, David Cameron, Gordon Brown, Tony Blair, John Mayer, and Margaret Thatcher.

Appendices I through L include full teaching and student materials to evaluate two pivotal United States presidents, Franklin Roosevelt and Abraham Lincoln, giving advice to current President Joe Biden about leading through times of national and global change, transition, and upheaval.

**Debriefing**

During debriefing, facilitators should integrate ideas raised by participants to leadership concepts explored in their own courses. Topics such as a leader’s communication style, authenticity, emotional intelligence, personality, charisma and cultural background naturally arise in these discussions. Included in Appendix E is an extensive list of debriefing questions and commentary in terms of typical student answers, common mistakes, and material students often miss.

**Conclusion**

By researching in-depth the last three popes and presenting what their leadership approaches were, participants should come away with many reflections about leadership effectiveness and the degree to which a new leader can learn from a predecessor’s strengths and shortcomings. The debriefing itself is crucial in this regard. Not only should certain leadership theories/concepts (such as charisma, authenticity, servant leadership, transactional vs. transformational leadership) become more vivid as a result of the exercise and debriefing, but also participants should become increasingly aware that leadership excellence often begets enterprise success. The exercise is intended to motivate participants to enhance their own
leadership skills through all means possible—including learning from their predecessors—in order that they may be instrumental in advancing their own organization’s success.
References


Appendix A: Participants - Exercise Overview, Instructions, and Glossary

Recently you were selected by Pope Francis to join a lay group of men and women called People to Pope. This recognition is richly deserved. The program calls upon distinguished leaders from all faiths and all walks of life to assist the pontiff in his mission to revitalize the Church for the future. While Francis admires all his predecessors immensely, he would like you to focus your attention on the two most recent pontiffs, John Paul II and Benedict XVI, whose relevance in terms of leadership effectiveness/ineffectiveness may be beneficial to him.

Their combined tenures as Bishop of Rome began in 1978 with the historic naming of the first Polish pope and the first non-Italian pope in more than 400 years, Pope John Paul II; continued in 2005 with Pope Benedict XVI, the first pope to resign (in 2013) since Pope Gregory XII in 1415 and the first to do so on his own initiative since Pope Celestine V in 1294; and continues now with Pope Francis, the first Jesuit pope, the first non-European pope, and the first South American pope.

As you know, over the past several decades, the Church has been pummeled by world events, scandal, and general disaffection. And while the Church’s influence and membership has grown in Latin America and Africa, its influence has declined in Europe and the United States. Therefore, Pope Francis is soliciting advice from the People to Pope program to complement the advice he’s being given from the Curia, which may or may not have its own agenda. [At the end of these instructions, refer to a glossary of terms used by the Catholic Church, ]

You are being placed in one of several teams to present your ideas to Pope Francis. You should view this as a unique opportunity to study the accomplishments/frustrations of three men who rose to the apex of the Church hierarchy. Moreover, by thoroughly studying these men’s
lives, challenges, and setbacks, it should provide insights of how you might enhance your own leadership effectiveness.

**Your job is to provide advice to Pope Francis as described in the tasks below:**

**Task #1.** Each team researches their assigned pope pair (Francis and Benedict XVI or Francis and John Paul II). The Holy See: Vatican Archives containing primary source information on each pope including Motu Proprio (papal proclamations), speeches, travel information, letters, daily meditations, audiences, and biographical information should be used as a starting off place. Though Wikipedia can be used as a complement to the Vatican Archives, each team member is expected to bring to their team’s attention five (non-Wikipedia) and authoritative sources for each pope and to produce an annotated bibliography of the sources used for each pope’s personal background. Team members should share information with each other and decide upon a subset of articles that will be included in the presentation. *Research suggestions are offered at the end of this assignment (Appendix G) as a starting/inspiration point; however, teams are not expected to use all of them. Furthermore, teams must identify resources of their own.*

**Task #2.** Describe what your assigned Pope Francis predecessor (Pope Benedict XVI or Pope John Paul II) was like and how his leadership approach may be described by these concepts, including but not limited to: *trait-based leadership, behavioral theory of leadership, contingency theory, situational theory of leadership, emotional intelligence, effective communication, transactional vs. transformational leadership, followership, managing change, Level 5 leaders, servant leadership.* Consider as well the influence of organizational or national culture on leadership style.

**Task #3.** Then, make your presentation and research findings engaging and compelling regarding the leadership lessons you have learned from this exercise as well as those you want to pass along to Pope Francis.
**Glossary of Terms.** To make your **People to Pope** job easier—below is a list of unique terms used by the Roman Catholic Church.

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
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</thead>
<tbody>
<tr>
<td>Pontiff or Bishop of Rome</td>
<td>Another name for pope, the senior most leader of the Roman Catholic Church</td>
</tr>
<tr>
<td>Holy See</td>
<td>The ecclesiastical jurisdiction of the pope over Church leaders and the laity</td>
</tr>
<tr>
<td>College of Cardinals</td>
<td>Like the pope, cardinals are appointed by life and named by the incumbent pope. As a rank, cardinal is the second-highest rank that an ordained priest can attain. Presently there are well over 200 cardinals, with wide representation across the world. The College of Cardinals is the body that elects a new pope after a pope dies or retires as was the case for Pope Benedict XVI.</td>
</tr>
<tr>
<td>Curia</td>
<td>The pontiff’s senior management team, often cardinals. They assist in the running of the Church’s vast bureaucracy.</td>
</tr>
<tr>
<td>Laity</td>
<td>The laity refers to members of the Roman Catholic Church who neither are clergy nor members of a religious order (monks, nuns). There are over 1 billion members of the Roman Catholic laity.</td>
</tr>
<tr>
<td>Vatican II</td>
<td>Called by Pope John XXIII in 1962, Vatican II addressed how the Church should relate to the modern world. It was ended in 1965 by Pope Paul VI. Changes that emanated from it were profound, including greater attention to and respect for the role of the laity as a vital force of the Church. Significantly influenced by Vatican II were four individuals who eventually became popes: Cardinal Giovanni Battista Montini, who upon succeeding John XXIII chose the name Pope Paul VI; Bishop Albino Luciani, the future Pope John Paul I; Bishop Karol Wojtyła, who became Pope John Paul II; and Father Joseph Ratzinger, there as a theological consultant, who became Pope Benedict XVI.</td>
</tr>
<tr>
<td>Catechesis</td>
<td>General educational instruction for how Catholics—young children and adults—can live a full Christian life.</td>
</tr>
<tr>
<td>Vatican or Papal Archives</td>
<td>Repository for biographical information on pontiffs, including where papal proclamations, decrees, encyclicals, and speeches are organized and preserved in order to provide research access to these materials. <a href="http://vatican.va/vatican/en.html">http://vatican.va/vatican/en.html</a></td>
</tr>
<tr>
<td>Papal Encyclicals</td>
<td>Encyclicals are papal communications on a high priority topic. They set forth the pontiff’s perspective on issues he considers to be of high priority to the Church or the world. Pope Francis’ third encyclical is “Fratelli tutti.” It was published during the COVID-19 pandemic and speaks to the importance of global brotherhood in the face of economic and social problems. He suggests we all are part of a larger human family. Pope John Paul II, given his lengthy papacy, delivered fourteen encyclicals.</td>
</tr>
</tbody>
</table>
## Appendix B: Participants - Suggested Research Template for Gathering Pontiff Biographical Data

<table>
<thead>
<tr>
<th>PERSONAL ATTRIBUTES</th>
<th>PROFESSIONAL STYLE &amp; EFFECTIVENESS</th>
</tr>
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<tbody>
<tr>
<td>Personality Traits, Education, Talents</td>
<td>Symbols/Images—including symbolism of name taken</td>
</tr>
<tr>
<td>Background, Culture</td>
<td>Message and Goals</td>
</tr>
<tr>
<td>Issues Faced in Life (Early Life Influences, Personal Struggles)</td>
<td>Leadership Style</td>
</tr>
<tr>
<td>Times He Lived In</td>
<td>Common Nouns Used to Describe Him</td>
</tr>
<tr>
<td></td>
<td>Common Adjectives Used to Describe Him</td>
</tr>
<tr>
<td></td>
<td>Big Events/Issues Faced in His Pontificate</td>
</tr>
<tr>
<td>In His Own Words—regarding the role of the pope</td>
<td>Source: Pope Francis’ Interview with Corriere della Sera, March 5, 2014</td>
</tr>
<tr>
<td>Example for Pope Francis: Depicting the Pope as a sort of superman, a star, is offensive to me. The pope is a man who laughs, cries, sleeps calmly, and has friends like everyone else.</td>
<td></td>
</tr>
<tr>
<td>His Mission for the Church</td>
<td>Source: Pope Francis. He often uses this field hospital analogy in describing the mission of the Church.</td>
</tr>
<tr>
<td>Example for Pope Francis: With a pastoral bent, Francis likens the Church to “a field hospital, where treatment is given above all to those who are most wounded.”</td>
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Appendix C: Facilitators - Exercise Logistics (Materials, Preparation)

Time Requirements

The time required to run this experiential exercise assignment is significant primarily because of the individual/team research required. The deepest insight will be gained, however, if participants take the research seriously. The facilitator can decide how much of the research and initial team discussion should take place outside of class. If all research by individuals, sharing their information, and development of the team advice are done outside of class, the time consumed in class could be 60 – 80 minutes. If individual research is conducted outside of class but initial team discussions to share and develop the team’s advice takes place within the classroom, the total time consumed in class could be 90 – 125 minutes.

Number of Participants

The Three Popes: Lessons in Leadership exercise, as described in the Structure of the Exercise section below, is designed for teams of three to five members. Ideally an even number of teams are created so that, with larger numbers of students, teams can present to another team.

Materials Needed and Room Set-up

Participants ideally sit with their teams at tables or in circled chairs so that they can discuss their research findings and develop the advice they will eventually give to Pope Francis. Movable tables and chairs work best. If the facilitator wants teams to provide visuals to accompany their advice to Pope Francis, then a computer, projector and projection screen or wall also will need to be arranged.

Preparation Needed Before Class by Participants

No preparation in advance of the exercise introduction is necessary nor do participants need to be Catholic or have prior knowledge about the Catholic Church. The participants will be
conducting extensive research in-between the introduction and when they meet with their teams to develop the team’s advice for Pope Francis. The facilitator can ask participants to review a list of leadership concepts and terms frequently associated with leadership. Although the authors have provided some suggested concepts/terms in the debriefing notes (Appendix E), facilitators are encouraged to customize that list as appropriate for their particular course, goals, or students. If dividing up the time on research further is desirable, participants could share research on Pope Francis, as all teams will be reading about him.

**Preparation Needed by Facilitator**

The facilitator will need to provide physical or electronic copies of the participant instructions and make sure recommended articles are available electronically. If the facilitator decides to take an alternative approach to focusing on three popes—such as focusing on three presidents or other types of leaders—then participant instructions will need to be adjusted accordingly. [Participant instructions for doing the exercise with U. S. presidents are offered as appendices.]
Appendix D: Facilitators – Step-by-Step Instructions for the Exercise

This exercise was designed for MBA courses, in which the majority of the participant research and preparation takes place outside of class. Facilitators can decide, however, how to balance the in-class and outside of class work as best for their particular courses.

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**Stage One: Introduction and team assignments** *(Suggested time: 10 – 15 minutes)*

The facilitator explains the exercise, its goals, the flow of the various activities, and indicates that the advice participants eventually present to Pope Francis will undoubtedly reveal to them important insights about leadership in general, including their own leadership. Then **People to Pope** teams are formed, consisting of three to five people per team. Each team is assigned a previous pope—either Pope John Paul II or Pope Benedict XVI—to research, along with Pope Francis. Participants are instructed to become familiar with their assigned popes and to review (if determined by the facilitator) leadership concepts mentioned in their instructions, as some of the concepts may stimulate their thinking about the leadership approaches of the popes. The facilitator underscores that the more in depth and serious the research, the greater insight participants can expect to take away from the experience.
Stage Two: Individual research (Suggested time: 2 – 4 hours)

Participants conduct their individual research, as instructed, outside of class on the team’s assigned popes and review leadership concepts. Appendices G & H provide resources suggestions on both leadership, and biographical sources on each pope to be used as starting points.

Stage Three: Teams meet, share and develop advice (Suggested time: 30 – 45 minutes)

Participants get together to share what they learned during their individual research. They review their findings using the lens of several of the leadership concepts and decide whether any of the leadership concepts were reflected (or not) in the approaches and actions of their assigned pope (either Pope John Paul II or Pope Benedict XVI). They begin to develop the major points they want to make in the presentation of their advice to Pope Francis and also determine how they would best summarize the insight they gained about leadership. Individual tasks for completing the team presentation are agreed upon.

Note: This stage could take place outside of class, or perhaps via an in-class Zoom using Breakout Rooms. If class time is available, however, holding these discussions in class or virtually offers the advantage of having the facilitator available to answer questions and to ask each team some questions that might stimulate their thinking.

Stage Four: Team time to develop presentation materials (Suggested time: 2 – 4 hours)

Each team is asked to create an engaging 10 – 15-minute presentation that showcases their research and the essence of the popes they have been assigned—emphasizing the popes’ backgrounds, personality traits, and effectiveness in dealing with leadership challenges. On the Internet, students will find ample visual content to enliven their presentations.

Stage Five: Presentations to Pope Francis (Suggested time: 30 – 35 minutes)
The team members who explored Pope John Paul II present their ideas and advice to Pope Francis, represented by the remainder of the class participants. The representatives of Pope Francis (i.e., the rest of the class) may ask questions for clarification or elaboration. Then the Pope Benedict XVI team members present their ideas and advice to Pope Francis (i.e., the rest of the class), followed by questions and answers. If there are multiple teams exploring the same papal predecessors and too much time would be required to have each team present their advice to the rest of the class, then teams can present to another team, whose members have studied the other papal predecessor.

**Stage Six: Discussion and debriefing** *(Suggested time: 20 – 30 minutes)*

This last stage is critical. Facilitators can ask participants questions about the experience itself as well as insight gained about leadership. For the popes, suggestions for potential questions follow in Appendix E.
Appendix E: Facilitators - Debriefing Discussions (for Popes)

Facilitators will want to conduct debriefing discussions in ways that are consistent with the learning objectives of their particular courses. There could be several different areas on which to focus.

But whether researching popes or other leaders, participants can be given opportunities to discuss their perspectives on the experience itself.

- What was it like conducting the research?
- What were the most challenging aspects of the experience?

*In response to the above questions, students typically mention they found themselves challenged by the sheer amount of research sources for each pope and had to find ways to navigate all of it. Some admitted they found Wikipedia informative and verified historical facts using the Vatican sources.*

- What helped or hindered in achieving various team goals? Probe for the ‘whys’ as well as what might have made the challenges easier.

*Students often mentioned that they found the Appendix B template helpful while doing biographical and historical research on the popes. It helped them to see where the team might be missing important parts of each pope’s storyline.*

- How did the team go about making decisions? How did the team meld individual opinions into team opinions?

**For those studying the three popes:**

An important area of questioning could be to discuss the challenge of relating what they learned in their research to a pope’s leadership style, communication, and approach to mission.

- Did any of the concepts we have been studying help you to better understand the popes’ styles or priorities?
Students often mention that researching the popes gave them real examples of how a leader’s communication style, authenticity, emotional intelligence, temperament, personality, and charisma contribute to how they are perceived as leaders.

- To what degree were the popes you studied endeavoring to build upon or repudiate a predecessor’s legacy? Or were they instead more intent on charting their own course and legacy?

Students often observe there was a closer connection between Pope Benedict XVI and Pope John Paul II—decades working together and sharing more conservative viewpoints. Yet, they do not and should not see that Pope Francis is repudiating anything that Pope Benedict XVI supported.

- How could the personal agendas/missions of each pope be described?

- To what degree were/are the personal agendas/missions different for the three popes, or were/are they—in fact—much more similar than the “face” each pope projected to internal and external stakeholders of the Church?

- How might significantly different personal agendas/missions have an impact on each pope’s leadership style?

Discussing issues related to organizational culture also can be fruitful—especially how the popes were both influenced by and may have been trying to influence the organizational culture of the Church.

- How would you describe the organizational culture of the Church?

- How did the various popes go about driving change?

- How did they articulate their personal mission in support of the broader Church mission?

- What were some concrete and symbolic actions they took to achieve those missions?

- How did they try to motivate followers?

- To which followers were they trying to appeal?
Another important area of questioning could depend on the degree to which teams integrated some leadership concepts to help explain papal behavior. The facilitator may choose to ask questions about selected leadership concepts/ideas/buzzwords.

- Did your assigned pope’s communication style affect his efforts to communicate with different kinds of constituencies?
- Do you think the national culture of the country from which the pope came influenced his behavior or priorities?
- Were there crucial moments in each pope’s life that informed his behavior or purpose going forward?
- Do you think your pope was perceived as ‘authentic?’
- How did your pope’s personality traits influence his approach? Among the personality topics, there could be interesting discussions regarding
  - humility (related to servant leadership and Level 5 leader ideas),
  - charisma (which usually stimulates debates on whether a leader must be charismatic in order to be effective), or
  - emotional intelligence.

The more we learn about these men, it is clear that they operated as executive leaders in different times, each of which presented different challenges, crises, and opportunities. The complex interplay between a given leader’s personality, background, skills, and approach—for the time and context within which they needed to lead—may mean that there can be no set recipe for leadership success. Yet we can certainly learn from other leaders how they approached their challenges/opportunities in their given time and context.
Did your team come across aspects of leadership that you see as universal and important for all leaders?

Participants often mention things like this:

- Leaders can get better at leading, which is in line with what Kouzes and Posner state, “Leadership is not a place, it’s not a gene, and it’s not a secret code that cannot be deciphered by ordinary people. The truth is that leadership is an observable set of skills and abilities ... any skill can be strengthened, honed, and enhanced, given the motivation and desire, the practice and feedback, and the role models and coaching.” (Kouzes & Posner, 2002, p. 386).

- Having a high level of emotional intelligence is critical to getting others to follow.

- Extraordinary communication skills inspire others to enthusiastically follow, especially knowing how to connect with different audiences in trying to your message across.

Did you come across aspects of leadership that you saw as not so productive for leaders?

Such discussions can ensure that there is leadership insight for all to take away.

Popes choose their own names once elected. They do this typically within hours of being elected. What, if anything, do you think about the names they chose for themselves?

What message, if any, might they have been trying to send to the world, the Church, or the laity by the names they chose?

- Profoundly affected by World War II, being anti-Nazism but nonetheless conscripted into Hitler’s Youth, Pope Benedict XVI chose his name in honor of Benedict XV who shepherded the Church after the turmoil caused by World War I and in honor of Saint Benedict widely admired in Europe and Germany for advancing the Benedictine Order and spreading Christianity throughout Europe.

Therefore, participants might be expected to point out that Pope Benedict XVI’s choice of name reflected his desire to maintain peace on the Continent and to encourage Catholics in Europe to more closely adhere to the traditional teachings of the Church with respect to being against same-sex marriage, birth control, homosexuality as a lifestyle, abortion, and Catholics taking communion if divorced.

- On the other hand, Pope John Paul II is rumored to have wanted to choose a Polish saint’s name, ever the romantic Pole, but was dissuaded by Vatican
Leadership advisors and chose instead his name in honor of Pope John Paul I (who had lasted as pope for only a few months) and Pope Paul VI, his two predecessors.

- **Pope Francis’** choice of name clearly reflected his more progressive priorities and view of how the Church should prioritize its mission. He picked Francis in honor of Saint Francis of Assisi, a man who was dedicated to the poor and downtrodden and who believed in peace and respecting God’s creations.

- And most importantly, are there “takeaways” from this exercise that will help you on your own leadership journey? Explain what those are.

  *If participants are having a hard time with this question, pose the following questions:*

- In the last few decades, how has the role of the leader changed?

  - The old rules are changing, even for popes. Increasingly hierarchy is yielding to flatter organizations, matrix organizations, multidisciplinary work teams—predicated on the notion that individuals closer to the “front lines” have valuable perspectives that should not be ignored by the leaders at the top. While Benedict was decidedly more of a “command and control” pope, Francis rejects that leadership style with his push towards more decentralized decision-making by local bishops. Regardless, there has been no significant distance between the two about Church doctrine.

- To what degree does leadership excellence lead to enterprise success?

  - Pope Francis’ humanness has done much to re-energize the Church. Of interest is the fact that he has not deviated to any great extent in the doctrinal teachings of the Church, though he is delivering the Church’s message in a less severe way. He graciously expresses admiration for his predecessors, including Pope Benedict XVI. Compared to Pope Benedict, his message comes across in a less judgmental way.

    *In Pope Francis’ words: “Yes, I believe that this is a time for mercy. The Church is showing her maternal side, her motherly face, to a humanity that is wounded. She does not wait for the wounded to knock on her doors, she looks for them on the streets, she gathers them in, she embraces them, she takes care of them, she makes them feel loved.”* (Pope Francis, 2016, p. 6).

    Like a Level 5 leader (Collins, 2005), Pope Francis’ humility is likely to resonate in ways that better ensure the Church’s relevance in the 21st century. (Krames, 2015).
Appendix F: Facilitators - Exercise Outcomes and Experiences

As discussed, the exercise has been used in two MBA courses where students concentrate on developing their management and leadership skills and competencies. As always, we are somewhat concerned with whether the students will put in the required time and research to extract the level of learning that the exercise is structured to provide. To serve as a catalyst for what could be a large research effort, the authors have identified many traditional and online research resources (Appendices G & H), including the Papal Archives, Wikipedia, and major news outlets to readily commence biographical research.

Clearly, the exercise has the side benefit of getting students to speak and give advice to others—a crucial skill for business professionals trying to advance in their careers. Their critical thinking and team-building skills are likely to be enhanced as they are asked to seek consensus in their final recommendations to Pope Francis. Students in the aforementioned courses found the exercise to be of value, especially because it brought forth interesting examples of the importance of leadership in advancing an organization’s mission and the importance of crafting one’s own authentic leadership style.
Appendix G: Leadership Resources in General and by Theme

I. Online Sources

While leadership and management textbooks will have sections on major leadership theories, here are some additional Internet sources that can be used for quick reviews:

- http://changingminds.org/disciplines/leadership/theories/leadership_theories.htm
- http://www.leadership-central.com/leadership-theories.html#axzz3x9RqBP50

II. Articles and Books

Below are selected leadership articles or books, organized by themes considered relevant to the Three Popes: Lessons in Leadership activity.

General Leadership


**Leadership Traits and Behavior**

*Trait-based Leadership, Charisma, Emotional Intelligence, Leadership Style & Communication, Transactional vs. Transformational Leadership*

**Trait-based Leadership:**

**Charisma:**

**Emotional Intelligence:**

**Leadership Style and Communication:**

**Transactional vs. Transformational Leadership:**

**Servant Leadership**


**Leadership and Organizational Performance**

*(Level 5 Leadership and Authenticity)*


**Level 5 Leadership:**


**Authenticity:**


Appendix H: Research Resources: Popes

I. General Sources and Online Sources

- The Holy See: Vatican Archives
  http://www.vatican.va/content/vatican/en.html which include Motu Proprio (papal proclamations), speeches, travel information, letters, daily meditations, audiences, and biographical information for each Pontiff:
  - http://www.vatican.va/content/benedict-xvi/en.html
  - http://www.vatican.va/content/francesco/en.html


- Blogs/Weekly Columns: “All Things Catholic” (John L. Allen, Jr.’s weekly column)

- Wikipedia: with specific attention to references cited at the end of each pontiff’s report
  - https://en.wikipedia.org/wiki/Pope_Benedict_XVI
  - https://en.wikipedia.org/wiki/Pope_Francis

II. Articles and Books

Pope John Paul II (pontificate—1978 to 2005):


**Pope Benedict XVI (pontificate—2005 to 2013):**


**Pope Francis: (pontificate—2013 to present):**


Appendix I: Participants - Exercise Overview & Instructions

Recently you were selected by President Joe Biden to join a group of esteemed colleagues called People to President. This recognition is richly deserved. The program calls upon distinguished leaders from many walks of life to assist the new president in his mission to Build-Back-Better. While President Biden admires several of his predecessor presidents, he would like you to focus your attention on two past presidents: Abraham Lincoln and Franklin Delano Roosevelt whose relevance in terms of leadership effectiveness/ineffectiveness may be beneficial to him.

As you know, over the past several decades, the country has faced its share of challenges: 9/11, the Great Recession, the rise of emerging economies like China and India, scandals, grass-roots political movements, climate-induced disasters, and last, but not least—the COVID-19 pandemic. These challenges have been aggravated by increasing economic and political divisions within the citizenry. And while the United States’ influence remains high, its influence has decidedly declined with some of the country’s previously-staunch Western allies.

Therefore, Joe Biden is soliciting advice from the People to President program to complement the advice he’s being given from his own Cabinet and Congressional leaders, but some of his staunchest supporters may not fully share in the ideas/policies of the Biden-Harris administration.

You are being placed in one of several teams to present your ideas to President Biden. He is inviting you to the Oval Office to remind him of the leadership lessons of these two presidential predecessors who rose to the same pinnacle of power as he now holds. You should view this as a distinct opportunity to study the accomplishments/frustrations of two U.S.
presidents as they strove to lead our country. Moreover, it should provide insights in terms of how you might enhance your own leadership effectiveness.

*Your job is to provide advice to President Biden as described in the tasks below:*

**Task #1.** Each team researches their assigned president pair. The National Archives is one source that contains collections of Public Papers of the Presidents from 1992 to 2016 (https://www.archives.gov/federal-register/publications/presidential-papers.html). Also, many Presidential historians comment on presidential leadership, with Doris Kearns Goodwin having recently focused on four U. S. presidents [Abraham Lincoln, Theodore (Teddy) Roosevelt, Franklin Roosevelt, Lyndon Johnson] in her book 2018 *Leadership in Turbulent Times*. Though Wikipedia can be used as a complement to your research, each team member is expected to bring to their team’s attention five (non-Wikipedia) and authoritative sources for each U.S. president and to produce a bibliography of the sources used for each president’s personal background. Team members should share information with each other and decide upon a subset of articles that will be included in the presentation. *Research suggestions are offered at the end of this assignment (Appendix K) as a starting/inspiration point.*

**Task #2.** Describe what your assigned president predecessor was like and how his leadership approach may be described by these concepts, including but not limited to: *trait-based leadership, behavioral theory of leadership, contingency theory, situational theory of leadership, emotional intelligence, effective communication, transactional vs. transformational leadership, followership, managing change, Level 5 leaders,* and *servant leadership.*

**Task #3.** Then, make your presentation and research findings engaging and compelling regarding the leadership lessons you have learned from this exercise as well as those you want to pass along to president, Joe Biden.
Appendix J: Participants - Suggested Research Template for Gathering U. S. Presidents Biographical Data

<table>
<thead>
<tr>
<th>PERSONAL ATTRIBUTES</th>
<th>PROFESSIONAL STYLE &amp; EFFECTIVENESS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personality Traits, Education, Talents</td>
<td>Symbols/Images</td>
</tr>
<tr>
<td>Background, Culture, Party Affiliation, Experience in Elected Office (local, state, national)</td>
<td>Message and Goals</td>
</tr>
<tr>
<td>Issues Faced in Life (Early Life Influences, Personal Struggles)</td>
<td>Leadership Style</td>
</tr>
<tr>
<td>Times He Lived In</td>
<td>Common Nouns Used to Describe Him</td>
</tr>
<tr>
<td></td>
<td>Common Adjectives Used to Describe Him</td>
</tr>
<tr>
<td></td>
<td>Big Events/Issues Faced in His Presidency</td>
</tr>
<tr>
<td>In His Own Words [Franklin D. Roosevelt]—regarding tenacity and overcoming what life throws at you</td>
<td></td>
</tr>
<tr>
<td>• The only thing we have to fear is fear itself.</td>
<td></td>
</tr>
<tr>
<td>• When you reach the end of a rope, tie a knot in it and hang on.</td>
<td></td>
</tr>
</tbody>
</table>
Appendix K: Facilitators - Debriefing Discussions (for U. S. Presidents)

Facilitators will want to conduct debriefing discussions in ways that are consistent with the learning objectives of their particular courses. There could be several different areas on which to focus.

But whether researching presidents or popes or other leaders, participants can be given opportunities to discuss their perspectives on the experience itself.

- What was it like conducting the research?
- What were the most challenging aspects of the experience?
- What helped or hindered in achieving various team goals? Probe for the ‘whys’ as well as what might have made the challenges easier.
- How did the team go about making decisions? How did the team meld individual opinions into team opinions?

For those studying the three presidents:

An important area of questioning could be to discuss the challenge of relating what they learned in their research to each president’s leadership style, communication and approach to stated agendas.

- Did any of the concepts we have been studying help you to better understand the presidents’ styles or stated agendas?
- To what degree were the presidents you studied endeavoring to build upon or repudiate a predecessor’s legacy? Or were they instead more intent on charting their own course and legacy?
- How could the overall agendas of each president be described?
• To what degree were/are the agendas different for the three presidents, or were/are they—in fact—much more similar than the “face” each president projected to supporters and non-supporters?

• How might significantly different agendas have an impact on each president’s leadership style?

Discussing issues related to organizational culture also can be fruitful—especially how the presidents were both influenced by and may have been trying to influence the organizational culture of the government.

• How would you describe the organizational culture of the governmental offices they led?

• How would you describe the other branches of government with which they had to contend or influence?

• How did the various presidents go about driving change?

• How did they articulate their personal agenda and tie that into what they considered to be the nation’s purpose/mission?

• What were some concrete and symbolic actions they took to achieve their agendas?

• How did they try to motivate followers—both staff and their constituencies?

• To which followers were they trying to appeal?

Another important area of questioning could depend on the degree to which teams integrated some leadership concepts to help explain presidential behavior. The facilitator may choose to ask questions about selected leadership concepts/ideas/buzzwords.

• Did your assigned president’s communication style affect his efforts to communicate with different kinds of constituencies?
• How might the regional culture of his upbringing, or his party affiliation influence (have influenced) his behavior or his goals?

• Were there crucible moments in each president’s life that informed his behavior or purpose going forward?

• Do you think your assigned president was perceived as ‘authentic’?

• How did your president’s personality traits influence his approach? Among the personality topics, there could be interesting discussions regarding
  o humility (related to servant leadership and Level 5 leader ideas),
  o charisma (which usually stimulates debates on whether a leader must be charismatic in order to be effective),
  o emotional intelligence, or
  o temperament.

The more we learn about these leaders, it becomes clear is that the three presidents operated in different times, each of which presented different challenges, crises, and opportunities. The complex interplay between a given leader’s personality, background, skills, and approach within the time and context within which they needed to lead may mean that there can be no set recipe for leadership success. Yet we can certainly learn from other leaders how they approached their challenges/opportunities in their given time and context.

  o Did your team come across aspects of leadership that you see as universal and important for all leaders?
Did you come across aspects of leadership that you saw as not so productive for leaders? Such discussions can ensure that there is leadership insight for all to take away.

To what degree did the presidents you studied behave like managers, or like leaders?

Why do you think that? Provide examples of when they acted like managers and examples of when they acted like leaders?

Presidents more freely demonstrate their own styles and agendas once elected. They do this in many ways, as they assume power. Often their Inaugural Addresses give us a glimpse of the type of president they will be, as they articulate the goals, legislation, and codes of conduct they intend to pursue in order to advance the country. What, if anything, do you think about the style these presidents chose to demonstrate early on? What message(s), if any, might they have been trying to send to the world, other elected government officials, or the country’s citizens/residents as they began their presidencies or upon re-election?

And most importantly, are there “takeaways” from this exercise that will help you on your own leadership journey? Explain what those are.
Appendix L: Research Resources by Subject Area—for U. S. Presidents

I. General Sources and Online Sources


- Lincoln and FDR Speeches (The Gettysburg Address and the Four Freedoms Speeches, respectively and how these pivotal speeches created a unified common vision forward with actionable and concrete ideas regarding citizenship, unity, and what the future of America should look like and what we should—collectively—be fighting for.

Lincoln - Gettysburg Address (November 19, 1863)

- An audio recording of the Gettysburg Address https://archive.org/details/gettysburg_johng_librivox (2 minutes)

- Transcript of the Gettysburg Address via National Archives


- National Geographic Entry on the Significance of the Gettysburg Address https://www.nationalgeographic.org/encyclopedia/gettysburg-address/

FDR - Four Freedoms Speech (January 6, 1941)

- The National Archives remastered video of the 'Four Freedoms' speech as and its significance https://fdr.blogs.archives.gov/2016/01/06/four_freedoms/

- YouTube Link (from FDR Library) of Four Freedoms Speech: https://www.youtube.com/watch?v=qrNDwyj4u1w (2 minutes)

- 'Teachable Moments' from FDR Library regarding the Four Freedoms Speech
https://www.youtube.com/watch?v=0JNK1UcoUr4 (2 minutes) - part of the FDR Library 'Teachable Moments' WWII video series
https://www.youtube.com/watch?v=WXverYvGFDI&list=PLnYXL2y0SAPHgTO3_oKdMWcaxCFLjIrqv

- Link to Norman Rockwell Four Freedoms Paintings
  https://rockwellfourfreedoms.org/about-the-exhibit/rockwells-four-freedoms/

- Films/Documentaries/Mini-Series:
  ○ *The Roosevelts*, a Ken Burns documentary
  ○ *Lincoln* (2012), director: Stephen Spielberg


- YouTube

- Wikipedia: with specific attention to references cited at the end of each U. S. president’s report
  ○ https://en.wikipedia.org/wiki/Joe_Biden
  ○ https://en.wikipedia.org/wiki/Franklin_D._Roosevelt
  ○ https://en.wikipedia.org/wiki/Abraham_Lincoln

II. Articles and Books

*Abraham Lincoln* (16th U. S. president—1861 to 1865):


**Franklin Delano Roosevelt (32nd U. S. president—1933 to 1945):**


**Joseph Biden: (46th U. S. president—2021 to present):**


