An MSR Webinar in Conjunction with the

Tyson Center for Faith and Spirituality in the Workplace

June 2, 2016

**Panelists** – Andre Delbecq, University of Santa Clara (California),

Kathryn Pavlovich, University of Waikato (New Zealand),

Charlie Tackney, Copenhagen School of Business (Denmark) and

Daniel Harris, Walton College of Business (Arkansas)

**Background: Daniel Harris**:

This is survey is exploratory research designed to find commonalities among scholars and teachers who have created or modified courses that speak to the changing needs of students. Many such course focus on meaning, purpose, values, character, spirituality in business. Is this an incipient movement in higher education? If we identify the commonalities and describe some terms, can we begin to define research questions for future? Andre mentioned at an earlier time that this is like the early days of the automobile when all the early models had in common was that they used an internal combustion engine to move people from A to B -- otherwise they varied greatly.

Where should we go with further research?

KP: Would like to see a book that includes different approaches and practical guidance for teaching courses of this nature.

Andre: There are different options for approaching the topic: I see a bifurcation between ethics and spirituality.

Charlie: “Ultimate values” is one way to bring philosophy and epistemology into a discussion that may open into spirituality, but religion and spirituality are not discussed at CBS, nor in most secular European universities. He likes the idea of more research leading to a book but should try to integrate spirituality with philosophy and epistemology.

KP agrees this is a different ontological way of looking at the world. If you are enacting your spirituality, it’s an oxymoron to be a purely rationalist person.

**Dan Harris present results of the survey** -- **See Dan’s power point**.

50 Respondents of whom 31 created a course to address student needs for deeper connection with life and 9 who created a course they describe differently. Forty scholars created or modified a course to address needs they believed were not being met.

When asked why they created/modified a course, 61% named: “My intuitive sense that something was lacking”. It may be hard to put your finger on what’s lacking but observation of social trends and interaction with students motivated scholars to address these needs in the classroom. Others were stimulated by feedback from business and personal experiences

Factors that particularly motivated these scholars included a lack of direction for life among our students. Vague moral frameworks, aimless hedonism and lack of civic engagement were also named by at least a third of participants. Of the 19 comments on this topic, several were stated positively, e.g., students need self-awareness and meaning to relate to others, to find connections and meaning in work and life, and to prepare for leadership in a complex world. Other comments expressed concern about the lack of caring about others, the lack of a moral foundation at the individual level and a belief that consumption will bring happiness.

It is encouraging to see that a third of participants felt supported or at least given the benefit of the doubt by their academic colleagues in creating or modifying a course to address perceived needs. Another quarter said their colleagues were not aware of what they were doing. About 17% felt hostility, indifference or skepticism.

Students tend to be very enthusiastic about these courses, which intrigues and surprises academic colleagues.

Nearly 70% of these courses are part of the curriculum (vs. experimental or special topics) and a surprising 60% are required rather than electives. The majority are undergraduate but about 45% are offered at the graduate level.

In terms of broad approaches to teaching, values and spirituality in business were named most often, followed by ethics or authenticity. Comments included others such as identity development, sustainability and the introduction into business courses of topics more often found in liberal arts curricula.

What resonates with students varies a great deal, indicating that instructors use a rich variety of options to stimulate reflection and learning. Topics or themes such as finding a sense of meaning and purpose was named by 45% of respondents. Mindfulness/meditation and experiential learning were each cited by a quarter of respondents. Comments from participants provided valuable detail on topics, books, experiential learning, etc. Different readers may pick out different themes. For example, I see that reading and experiential learning (including mindfulness exercises) help students discern what gives them a personal sense of meaning and purpose. When they then connect that discovery to their future lives (e.g. through personal mission statements), it can be quite powerful.

Evidence that courses make a difference tends to be heavily anecdotal, though student evaluations and analyses of student essays through the term provide significant support. Thirty percent of respondents cited either an instrument or research as providing evidence of impact. Three respondents indicated they used instruments: a research survey normed to the National Study of Youth and Religion, the Moral Foundation Survey and Emotional Intelligence Survey, and unnamed “standard instruments on mindfulness, compassion, subjective vital energy, engagement, perceived stress.”

Best Practices were rich and varied. The slides cite them verbatim and arrange in several groups:

1) Use experiential learning and academic sources to give students rational frameworks that reassure them that their experiences are supported by credible sources;

2) Take students on a journey, an adventure, and ask them to be open.

3) Start slowly to overcome skepticism and build towards your goals, using your intuition to adapt to each group of students as you go along the way.

4) Offer multiple perspectives – ask hard questions, provide a rich mix of varied inputs, offer objective but caring feedback and encourage them to find their personal “Aha!” moments.

5) Bring your passion but don’t preach. Let the students see and feel that you are fully engaged in promoting their development – but let them decide where the journey will take them.

6) Stimulate self-awareness – one must first be self-aware and open to self-improvement – only then can one lead or interact genuinely with others.

7) Reflection and Personal Mission Statements

8) Insight – one approach especially where spirituality cannot be discussed as a means to stimulate awareness and self-discovery.

9) Appreciation Exercise – an exercise in feeling grateful and recognizing others.

10) Getting to “Yes” – tips for getting your course approved by the faculty

**Andre Delbecq**: Professor at the University of Santa Clara

Andre’s Course title: Spirituality of Organizational Leadership

Andre compared his experience at Santa Clara with the data. He finds a good deal of his experience is supported by the data. See Slides.

Andre began teaching spirituality in business in 2000 as an Advanced MBA elective with senior executives participating. Also taught similar program for healthcare executives – thus mature adults.

Always asked students why they gave up weekends to do this course. Many reasons including the complexity of work, moral dilemmas, mischief at work – but the overarching reason was the search for meaning. Work in Silicon Valley is so intense, so consuming, that unless it has significant meaning, you will burn out and leave. There was an intriguing shift about 2010 – a different and even more predominant reason: word of mouth both in the Valley and among the students that there were spiritual practices that would be life-changing, especially the meditation practices. Previous participants indicated their lives had changed through the course and they had adopted continuing practices. As word spread, more people wanted in.

See: Spirituality as World View and Path - Cavanaugh, G., Hanson, K., Hanson, B. and Hinojoso, J. (2001)

The unmet need mentioned by 48% of respondents also motivated Andre and his colleagues; they recognized another dimension of life had not been tapped. Note: The primary movement occurred in society first. Spirituality had become a mega-trend long before the Academy began to offer courses to respond to that unmet need. It was motivation for deeper meaning that lead people to offer and pursue a seminar like this. Note: Ethics had been offered at Santa Clara for years as a different part of the curriculum. The path as a route into spirituality was a very different path.

The seminar was always built on the dilemmas executives were facing, the gaps in life, the special challenges that we could explore through the wisdom of a religious and spiritual perspective. Andre’s focus groups with senior executive showed clearly some critical topics that mattered greatly. These executive looked for evidence of understanding the same issues in new hires. For example, what evidence did they find new hires were entering into leadership as a vocation as opposed to just a task; what was their grasp issues around discernment in making complex decisions. How does one access wisdom and not just a rational analytic process that misses emotional intelligence?

The executives and students began each course looking at the dilemmas and searched for the wisdom of various religious traditions for insights. Students were highly diverse, including atheists. After looking at what social science had to say about an issue, they would look at wisdom traditions, then engage in a spiritual practice, such as simple meditations such as threshold meditations so you are centered and do not bring the remains of previous tasks into the current one. Over time, they experienced movement from meditation into silence in meditation.

Assignments required application of the concepts in the following two weeks to see how it changed their interpretation of experiences of leadership; also how the meditation practice affected their behavior and what feedback they received from others about changes in their behaviors. Though the conceptual assignments were critical, the most robust discussions about behavioral change centered around spiritual discipline assignments. What drew them into significant behavioral change were the spiritual practices. This echoes the survey finding that 76% of instructors focused on the importance of spirituality and meditation practices, not just conceptual, intellectual aspects.

About 45% of survey respondents cited change in meaning and purpose. Andre’s students ended up with a very, very different perspective on what the call to leadership meant -- what the challenges of the contemporary organization were and how leaders should be present. This created a serious shift in their understanding of meaning and purpose. Likewise they came to value the meditation, journaling and spiritual practices. (Survey indicated 45% valued these.) Many of those who remained in touch say they continued those practices, which have become part of who they are and how they behave as leaders each day.

Getting to ‘Yes’: The course was initially vetoed unanimously by the graduate curriculum committee, so it was taught as a special topics. The feedback from students was so positive that resistance faded. After six years it became a formal part of the curriculum, not due to the support of the Academy but the overwhelming support of executive and student participants. Andre remembers the introduction of OB, corporate ethics, CSR – about a 25 years projection from pioneers to positive acceptance by students, to affirmation of value by employers and finally acceptance by the Academy as a serious part of the curriculum. Andre believes MSR is on a similar trajectory. Andre’s course experienced continuous development based on consultations with other pioneers and student feedback. The MSR interest group in the Academy and support from the business executives in Silicon Valley and healthcare allowed the development of both the conceptual and the spiritual practices that made the course a success.

**Outcomes** can be measured by exceptional student evaluations, powerful anecdotal feedback, and content analysis of student assignments showing their movement through the stages of spiritual development using examples from their leadership experiences at work. Focus groups of past participants in the seminar resulted in very positive evaluations. The executive cohorts in the health care industry (that builds on the experience in the seminars) provide quite sophisticated feedback through content analysis and other means.

# Kathryn Pavlovich – University of Waikato in New Zealand

Course Title: Managing the Spirit 🡪 Self-actualizing Leadership

Fifteen years ago, her university made sustainability a theme. KP created “Managing with Spirit” and it was approved by her department, but the rest of the University was against it. Took a lot of effort to win allies but it was approved by the University.

KP was motivated by a sense she needed to teach in a different way rather than the rationalist, economically-driven method of teaching. The development of the course flowed naturally around inner leadership, self-awareness and mindfulness. She brought in other perspectives like the chakra system to understand values and virtues through a different lens. Second, she looked at what purpose means in organizations and encouraged students to go discover how purpose manifested in the workplace. This gave them more confidence in what they were learning. Third, she brought in quantum physics to explore inter-dependence and connectedness. She has brought many different concepts in the course to give students stronger resonance around what spirituality means, most recently neuro-theology.

The course is an elective, but many strategy and HR majors must take the course, so you get a number of skeptics. She has to take them on a journey. Resistance is much greater at the beginning but many find it one of the best courses in their university experience. She tells them she is taking them out of their comfort zones and encourages them to embrace this.

Journaling around personal purpose, conscious leadership and summarizing their learning through art at the end of the course all are mentioned in student feedback. She always starts the class in a circle to share experiences and lager experiments with different types of meditation.

Evidence is mostly anecdotal but powerful, especially from students who were skeptics. Some say it changed their lives; or she receives an email from students’ years later who refer to it as crucial in recent decisions. We may not be able to measure impact at the end of a term, but we stimulate students to examine their own narratives. How on earth can you manage others before you can manage yourself?

If there’s one course I would teach for free, this is it! I teach it from my own passion so my students can see the world from a different perspective.

**Charles Tackney**: See Slides

The Copenhagen Business School has own philosophy department, which indicates an interest in broader training of students. CT has been there since 1999 as Asian Studies Director, and as such has wrestled with questions like: How do you reconcile culture with economic studies when one is qualitative and the other is quantitative? How do student understand and reconcile the differences? He began to draw on *Insight* by Bernard Lonergan – a Jesuit theologian, economist, and philosopher – and continues to use Lonergan.

CT teaches “insight-based critical realism” in courses at undergrad level and business language and culture and inter-disciplinary research methods at undergraduate and graduate; e.g., Applied Quantitative Methods for Non-Quantitative Doctoral Students.

Where do you go to resolve the apparent contradictions between qualitative/quantitative research? CT starts with “insight.”

At the master’s level, CT teaches leading and managing in inter-cultural projects and looks at what constitutes authentic leadership. This goes back to cognitional operations – the way the mind works.

Comments on the Survey: Does the survey have data to permit breakdowns between US/EU and/or international responses? Any patterns between public or private higher education projects, e.g., in the degree of support or resistance from faculty. How do scholars in private institutions see spirit and spirituality manifested in curriculums? CT notes that one would expect to find Ignatian spirituality running through leadership courses in Jesuit universities but this is not always the case.

CT is at a national university in the EU. How do “ultimate values” evidence themselves in the EU as it is developing? Through the Bologna Declaration (1999), national universities are required to participate increasingly in the European Higher Education Area (EHEA), an integration project. It’s been happening for 16 years. What is this leading to and how does it relate to the research interest of this survey?

The Bologna Declaration aims at “a Europe of knowledge…as an indispensable component to consolidate and enrich European citizenship…” Every university is supposed to be engaged in this EU effort to educate good citizens. CBS has 50% non-Danes.

CT focused attention particularly on Bologna Process objective #6: “Promotion of the necessary European dimensions in higher education, particularly with regards to curricular development…” This is specifically about European dimensions. CT thus assumes that his curriculum should teach students from different cultures and different nations. He begins with Lonergan’s slogan:

“Thoroughly understand what it is to understand, and not only will you understand the broad lines of all there is to be understood, but also you will possess a fixed base, an invariant pattern, opening upon all further developments of understanding.” (Lonergan, 2005, *Insight: A Study of Human Understanding*)

This opens possibilities to speak to ultimate values. First, ask students to share an insight they have experienced with each other, then each student shares the other person’s insight. A brief discussion at the start of classes aims to grasp what this insight process is for each individual. Second, drawing on statistics, ask students to see in their mind’s eye what a normal distribution is and why this is compelling and interesting. If you can visualize a normal distribution, then you know that something is real that you cannot sense in any way – yet you can reason yourself to seeing that this has reality in itself that cannot be denied. This is one of two principles of statistical inference. Once students grasp this, they are less afraid of statistics; and they are also open to the notion of values beyond simple sense experience. We end these classes with Lonergan’s Epistemological Theorem (what is the relation between Person, a datum and the universe?) that knowledge in the proper sense is knowledge of reality, that knowledge is intrinsically objective. Even if you’re in love, you need some feedback that it’s actually true. That objectivity is the intrinsic relation of knowing to being and that being and reality are identical.

When you get students to this point, following Lonergan’s insight-based critical realism, we come away with four principles: to be attentive, to be intelligent, to be reasonable, and to be responsible. We don’t get into faith issues because it’s not part of the brief in a national business school designed to integrate students for the future of Europe. That’s how we proceed here.

**Discussion**

Panelists agreed to share syllabi and other materials related to the course. They will be on the website of the Tyson Center for FSW either as documents or as links.

What do you see as opportunities for further research?

CT asked for a further breakdown of data but the survey was done anonymously so would have to ask respondents to identify themselves and their institutions. Will have to see if it’s possible to do this through Qualtrics.

KP: One of our problems is that we are in a different ontology. When she is talking about spirituality, she’s referring to the self-narrative, so we are looking at first-person methodologies when we’re looking at research. That means we need different frames of reference, different ways of understanding and presenting this. So we are challenging the dominant, scientific community. Many of us are in research institutions with an expectation to publish in high quality journals and that creates a tension. Still, we are passionate about this so we want to do this research, but we are aware that of the critiques of the first person narratives.

JMSR and some journals in MED are interested. There is an increasing interest in and validation of spirituality, so you see articles published in journals such as *Organization*. Egos has a whole section on mindfulness. So we are moving forward in legitimization and acceptance.

Andre: I am struck with the fact that three years ago the theme of AOM was “compassion.” Who would have imagined that ten years ago? I can’t think of any topic whether it’s compassion or vocation or discernment or other topics of the spirituality legacy that is not approachable through lenses that would make it a legitimate publication. Younger scholars are bringing much more dexterity in terms of qualitative research; but it’s not just qualitative. If you can do neuro-science studies on the impact of brain functioning, you can certainly do social-science studies on the impact of shifts in consciousness in response to exposure to spiritual wisdom.

Viewer comment: If you are on a tenure track, your more empirical colleagues are not likely to respect your publications. It seems that tenured professors and practitioners are the ones who can take the risks to work in this field.

DEH: Personally, I am working with a sociologist to do some inter-disciplinary work. She studied my experimental course. There are five articles in preparation. Whether this is of interest to our Academy remains to be seen, compared to journals on religion or sociology.

What other areas do you see for expanding the research? How would we know if this were an incipient movement? Would it be useful to have a conference around these themes?

CT is interested in the relationship, the interface, between scholars and their universities around these courses – whether welcomed and encouraged or opposed. Is there more to look at later? What are the institutions doing?

How can we legitimize the shift that’s taken place by referring to other domains; e.g., Hertzberg’s Hygienic Needs Theory, which looks at that which motivates us vs. what only comes to our notice if it’s not there (e.g. toilet paper). For example, diversity studies are struggling to become established in Europe; but things seem to shift in culture and areas that were seen as odd-ball can, in a brief time, become a really hygienic need. We’re seeing this in marriage equality in the United States. It happened really quickly. In the same way, it may become standard to have spirituality courses be required. What’s the relation between institutional norms and the individual initiatives within the institution? Could be seen on a macro scale.

Andre: There’s no question that relationships are increasingly critical to leadership. Artificial intelligence can do many things, but the relational aspects of leadership will not disappear, rather become increasingly salient. Scholars at Stanford are looking at the cultural impact of big data, robotics, sensors, etc., and the whole shift on the human side towards relationships and quality of relationships as being the unique contribution of the human being. Thus for leadership, the capacity for that deep, inter-personal relationship indicates that spirituality will be more and more important in the future, not less. There is both growing evidence from physiological, neurological and social science, as well as a cultural movement that says the personal relationship will be increasingly central and therefore leaders must be able to deal with the whole person, including the spiritual dimension. This area will accelerate more rapidly in the coming years.

Judi Neal noted that a lot of good work is being done in the private sector. Companies are doing their own research on what really is necessary for leaders to be successful and to adapt to increasingly rapid change and growing complexity.

IAMSR – May 18-20, 2017 offers an opportunity to include representatives of our very dynamic business sector to a much greater extent than ever before. We want corporate practitioners to mix with the academics.

Question: To what extent to you share your own spiritual antecedents with your students?

Dan: Right at the beginning of the course, I tell them: “I am here to help you on your journey, not take you on mine. Having said that, you need to know that I am a practicing Christian – first so you can filter for my biases, but second because I am trying to model for you what it looks like to be authentically who I am while sincerely trying to help you become who you are.”

Andre: Decades ago, when academics were wondering if it were even possible to approach sensitive topics like spirituality in the classroom, Judi Neal said: “If you are comfortable sharing your true self, no one will be offended. If you hide your true self, everyone will be put off.” I think you bring your true self to the dialog.

KP: I would struggle with that because I am eclectic. Always say to my students that I am taking you on a journey based on what’s resonated with me, but you are not obliged to accept any of that. You pick from a wide range of options whatever makes sense to you. Students appreciate this approach and feel free to challenge me, which I think is fantastic.

Andre: I would add that, as part of authentic sharing, the professor has an obligation to understand the language of other traditions and be able to address them as a pre-condition to sharing one’s own tradition. Every topic I deal with in spirituality, I ask myself where I can find insight from other traditions that opens opportunities for individuals from those traditions – or no tradition – to feel comfortable sharing. This is homework is necessary to be sensitive to others.

CT: Two simple examples: I teach research methods, which can be tedious and off-putting to students. To give people an example of what insight-based critical realism means functionally, I ask students to identify, from their own life experience, an insight that was important to them – not me. We deconstruct that moment of insight into its component parts. Eventually, in the statistics course, this all comes together when they figure out what a normal distribution is.

I may share from my own faith journey if it’s relevant, but in terms of insight I keep it really simple: I talk about when I understood what a wall socket was for. Because when we were little kids, back in the days before they put covers on them, we figured it out by sticking our fingers in them. My insight did not come the first time, but the second time when I did it deliberately. I knew something had happened the first time I stuck my finger in the outlet; but I had to do this twice to figure out what the causal relationship was.

The video of the webinar will be posted on the MSR and Tyson Center FSW websites.

Please note there are some 30 syllabi on the TFSW website already