

Case Study of Leadership of Jorge Mario Bergoglio (Pope Francis I): Leadership Theories, Applications, and Practice

J. Ndumbe Anyu
University of the District of Columbia

Sergey Ivanov
University of the District of Columbia

Mohamad Sepehri
University of the District of Columbia

Leading people is a task that requires skills and wisdom. This paper reviews the leadership of Jorge Mario Bergoglio. As the chief of the Catholic Church, Pope Francis must possess the skill set necessary to lead and manage his organization, the Catholic Church. This paper examines the leadership styles of Jorge Mario Bergoglio as a world class leader. The essay looks at the life experiences of this great man rising from Jorge Mario Bergoglio to Pope Francis, then discusses how pre-Francis impacted his holiness' leadership styles, and how he employs these different styles to share his vision and reach out to his followers.

Keywords: Leadership, Jorge Mario Bergoglio, Leadership Case Study

INTRODUCTION

Leading people is a task that requires both skills and wisdom. Today, more than ever before, many people aspire to the role of leader while lacking the skill set necessary to be one. In fact, with the continual rise of various want-to-be leaders, it has become challenging to differentiate true leaders from arrivistic. Since they all have made remarkable achievements and are able to draw crowds around, it is easy to mistake true leaders from impostors. Leadership is “the ability to articulate a vision and get others to carry it out” (Krames, 2015). Thus, leaders should “serve as the symbol of moral unity in the society” (Atonakis, 2015). As the chief of the Catholic Church, Pope Francis must possess the skill set necessary to efficiently grow his organization and impact other. To do so, he uses his personal experiences, environment and his position to affect other and communicate his vision. This paper will examine the leadership styles of Jorge Mario Bergoglio as a world class leader. The essay examines the life experiences of the Pope Francis from Jorge Mario Bergoglio to Pope Francis, then we will discuss how pre-Francis impacted his holiness' leadership styles, and how he employs these different styles to share his vision and reach out to his followers.

Jorge Mario Bergoglio was born on December 17, 1936 in Buenos Aires, Argentina, to Italian immigrant parents. He lived an interesting and inspirational life before becoming Pope Francis, the 266th pope of the Roman Catholic Church. His father, Mario Jose Bergoglio was an accountant employed by the railways and his mother Regina Sivori Bergoglio was a committed wife dedicated to raising their five children (The Holy See, 2015). His humble beginnings and life experiences are evident in his approach to leadership of the Catholic Church in the 21st century. But while many praises his accomplishments and leadership style, he has not been immune from the negative side and common pitfalls of public leadership, which included scandalous accusations and inevitable pushback to progressive change.

In addition to the challenges faced in his early teenage years, self-reliance for feeding and having to pursue his education from 8 am to 1 pm then to work from 2 pm to 8pm, he suffered from a lung infection that caused part of his right lung to be removed. As with the previous experiences, Bergoglio did not dwell on it but rather used that experience to further educate himself about life and adhere to “The frontier” principle, which he defines as “a positive and broad-minded attitude coupled with courage and audacity” (The Holy See, 2015). Throughout his life, Bergoglio has always leaned on lessons learnt from the very early experiences that mold the leader he has become.

Jorge Mario Bergoglio encounter with the God occurred in one of the most unusual, yet interesting and unique ways. In fact, he received his call on September 21, 1962, when he “stopped by a church to make a confession one summer day when he was seventeen-year-old” (The Holy See, 2015). Set to be a day no different than any other, for confession and worship were part of his family heritage and education, the events following the “stop for confession” (The Holy See, 2015) turned everything around. During the confession, the teenager experiences the divine call in a somehow brutal, “it was like being thrown from a horse” (Ivereigh, 2015), yet gentle way. He was “so deeply moved by the priest who heard his confession that he changed his plans” (Krames, 2015) and his life. Although the 1953 spring confession had an unprecedented impact on the young man, his heart was also guided toward political matters as “he loved to frequent political clubs” (Ivereigh, 2015).

After three years of indecisiveness on the final answer to his divine invitation, and blurred by his political interest, the young Bergoglio accepted his destiny and embarked on a journey that landed him in Rome. Regardless of his mother’s request for his studying medicine, he secretly continue to read theology and pursue his priesthood vocation until she discovered those books and asked him about his career. The answer he gave to his mother not only respectfully declined her request, but also introduce the career he had chosen for himself. Despite his young age, Bergoglio was already showing signs of great respect, intelligence and wisdom. Thus, he joined the religious order that could enabled the full blossom of his intellectual capability while fortifying his faith: the Jesuits. Also known as the “soldiers of Jesus”, (other name of Jesuits) the Jesuits emphasize education, as their reputation suggest, with a particular interest in the importance of language learning, and “the need for missionary evangelism in the life of a priest” (E.H, 2013). Like other religious order within the Catholic Church, the Jesuits vow to chastity, poverty and obedience. However, their fourth vow, obedience to the pope regarding mission, is the order’s “first principal and foundation” (Jesuits, 2015).

By all accounts, Jorge Mario Bergoglio has always been a man of great intellect. According to “Lead with Humility” author, Jeffrey A. Krames, a young Bergoglio considered a career in medicine, but changed his mind after a spiritual encounter, which occurred after he made a confession one day at church. Apparently, he was so deeply moved by the priest who heard his confession, that it inspired him to change paths. He believes that at that moment, in that church, with that priest, that God invited him to follow Him, and so he did. (Krames, 2015). His intellect was honed by expansive studies and teachings in Argentina, Chile and Germany. Before totally committing to a life of spiritual leadership and choosing the path of the priesthood, Bergoglio graduated as a chemical technician and worked odd jobs but did not find satisfaction in those areas. In 1958, he entered the Society of Jesus, where he completed his studies of the humanities, and later earned a degree in philosophy. For over 10 years, he taught literature and psychology. In 1969 he was ordained a priest, obtained a degree in theology in 1970, and in 1973 he made his final profession with the Jesuits.

In addition to his intellectual capacity, Bergoglio has a long history of being modest, humble and kind. In 2001, the Archbishop of Buenos Aires became a Cardinal, and rejected the expensive amenities afforded to his position and chose a simpler life of meager means. In Buenos Aires, he lived in a simple flat (apartment), where he cooked his own meals, made frequent visits to the poor in reportedly unsavory places, he regularly took public transportation, and favored a low-key lifestyle. When in Rome, he often preferred to keep his black robe on and is also said to have re-used the cardinal's vest used by his predecessor. His sermons always had an impact in Argentina and he often stressed social inclusion, indirectly criticizing governments that did not pay attention to those on the margins of society. When the Argentine economy was in crisis, he spoke at rallies that criticized government and showed strong support for poor people who were being persecuted for demanding work and highlighted the contrast of the rich (BBC News, 2015). In 2005 he was a strong contender to become Pope at the 2005 conclave and was reportedly the number one rival of Cardinal Joseph Ratzinger, who was duly elected and became Pope Benedict XVI. It is believed that one of the reasons Bergoglio was not the clear front-runner in 2015 was because of his past.

During the military overthrow of the Argentinian government in 1976, Bergoglio was accused of being involved in the kidnapping of two Jesuit priests. After dismissing the priests for disobeying orders, they were kidnapped by the death squads and tortured. Bergoglio petitioned for their release but was not able to do enough to free the men (Krames, 2015). During the 2005 conclave, a "Stop Bergoglio" file was circulated to soil his character and reputation. Despite that effort, Bergoglio came in second to Cardinal Ratzinger in all the votes. But Bergoglio decided to put the image and interests of the church above his own personal goals. He thought the continued voting would bring an appearance of fighting, separation and disharmony within the conclave. So, he made the ultimate sacrifice and did not engage in any self-promotion and began to canvass for Ratzinger, although he was already almost seventy, making this conclave likely to be the last for him to be considered.

In 2009, as cardinal and archbishop, his sermons often stressed social inclusion and criticized governments, which did not help those on the margins of society, describing poverty in Argentina as immoral and unjust. He places an enormous value on respect, dignity, and humanity and that is obviously clear in his messages. In one sermon he presented to Argentine priests in 2012, he attacked those who would not baptize children of single mothers. He delivered that "Those who separate the people of God from salvation. These are today's hypocrites" (BBC News, 2015).

After the unprecedented resignation of Pope Benedict XVI, it was evident that there was clear division within the church. Many did not consider Cardinal Bergoglio as the front-runner. Among the cardinals, one group wanted the principles of the Catholic Church safeguarded, preferring someone who would not make too many changes or be controversial. The other group understood that the church needed a relentless reformer, someone who would help people forget the tenure of Pope Benedict XVI, which was plagued by scandal. The Catholic Church needed a strong leader who could change the outdated traditions of yesterday and forge a new and more relevant path forward for the Catholic Church.

At the 2013 conclave, the cardinals gathered and discussed their needs of leadership, pontificating on this paramount selection. The media front-runner, Cardinal Angelo Scola of Milan, failed to impress or motivate his peers during his five-minute speech before the body. But in a short, heart-felt message, Cardinal Bergoglio was able to inspire the hearts and votes needed to earn his seat as the 266th pope of the Roman Catholic Church. He took his papal title after St. Francis of Assisi of Italy and became the first non-European Pope for more than 1,000 years and the first from Latin America.

THE LEADERSHIP STYLES OF POPE FRANCIS

According to the Great Man Theory, great leaders will arise when there is a great need. It encompasses the belief that the capacity for leadership is inherent and that great leaders are born and not made. The Great Man Theory realized this when the right man for the job seems to surface almost magically to take control of a situation and lead a group of people into safety or success, like the emergence Pope Francis.

In February of 2013, Pope Benedict XVI was the first papal leader of the Catholic Church to resign in over 600 years. Although Popes typically hold their positions until death, Pope Benedict XVI resigned from the papacy because of his ailing health. Under his administration, there were countless salacious activities that contributed to the Church's declining support and membership, and their increased rumors about depravity and internal immorality. Based on a 300-page report by three cardinals, the Catholic Church under the helm of Benedict XVI experienced blackmail, corruption, and an alleged network of power-wielding gay priests, Vatican Bank scandals and more. "The Church needed someone with more physical and spiritual energy who would be able to overcome the problems and challenges of governing the church in this ever-changing modern world" (BBC News, 2015). Enter Pope Francis, who would create innovative ways to balance new realities while breaking free of a constrictive past.

Journalists who have covered him in the press often write about his enormous intellect, even referring to him as a "political animal." Only a man with great humility and dignity, with the right mixture of shrewd political prowess and courage could save the spiraling Catholic Church from their demise. At the very moment when the church was covered by dark clouds of perversion and degeneracy, Pope Francis's election as leader of the Catholic Church, almost instantly began to restore faith among Christians, and reassured them that the church was once an institution capable of restoration and acceptance.

The premise of Trait Theory surmises that people inherit certain qualities and traits that make them better suited to leadership. By studying the traits and skills of successful leaders, it is the idea that personality or behavioral characteristics are shared by all leaders. Here is how Pope Francis exhibits some of the necessary traits outlined as critical to leaders.

1. Alert to social environment - Pope Francis has a keen awareness of social justice issues and is prepared for his role of social responsibility. His concern for the poor is one of the driving forces behind his ecological agenda, as it is the poor who will suffer the most from ecological issues such as climate change.
2. Decisive – Pope Francis believes in making assessments instead of judgments and he employs this in his decision-making. He makes decisions based on whether they will advance his ultimate strategy, which is to make the Catholic Church a more accepting institution.
3. Ambitious – Moving the Catholic Church into the 21st century to be progressive is a tall order. But Pope Francis has been able to match his ambition with action. He has dared to have conversations that have been totally ignored in previous years, discussing the changing stance of the Church on today's more complex family situations, divorce, contraception, and gay marriage.
4. Admitting error and owning up to mistakes – Pope Francis often refers to himself as a sinner and asks other to pray for him, basically acknowledging his own shortcomings as an imperfect human, capable of making mistakes.

One of the issues the Catholic Church had hundreds of years ago is failing to stand up for all human rights and committing numerous atrocities in the name of religion: The Inquisition, execution of world leaders who spoke against the church, the burning of witches, the Church's anti-Semitism and Muslims killed in the crusades (Tapsell, 2014). It usually takes hundreds of years for the Church to apologize for wrongdoings. But Pope Francis is committed to transparency and rebuilding trust with those with in the faith and on the sidelines, by being open and honest about the Church's position.

The assumption of the Behavioral Theory is that successful leadership is based in definable and learnable behavior. The assumption is that great leaders are not simply born with predetermined qualities, but they are made. It could be argued the Pope Francis learned some of his skills in leadership, by his previous roles within the university and lower-ranking roles in the church, before he became the pope. It was in those roles that he developed and honed his abilities to connect with people, and not to rush key decisions, which he had done in the past. Because of proximity, he also had the opportunity to witness first-hand the mistakes of his predecessors, which would give him insight on how to be a better leader without making their same mistakes.

Participative Leadership theory suggests leaders should encourage participation and contributions from group members and help group members feel more relevant and committed to the decision-making

process. While the leader does retain the right to allow the input of others, that involvement will create an environment that is less competitive and more collaborative. From his very first days as pope, Francis's top priority has been making the church more inclusive. He envisions the church as a place for all, not a small chapel focused on doctrine, orthodoxy, and a limited agenda of moral teachings. He ordered his bishops to go among the people, help them, and listen to their needs, so the church can be prepared to serve everyone.

He requires his clergy to engage in meaningful dialogue with various constituencies, especially the youngest in society. His "people-first" point is a key aspect of the Participatory Leader style. In an interview, Pope Francis addressed these techniques by saying "The bishops, particularly must be able to support the movements of God among their people with patience, so that no one is left behind" (Krames, 2015). Not only has Pope Francis made it a priority to pursue outsiders, he is empowering the people that the church serves.

Situational leadership refers to when someone in a leadership position must adjust their style to fit the factors within the specific situation and the development level of the followers he or she is trying to influence. With situational leadership, it is up to the leader to change their style, not the follower to adapt to the leader's style. In situational leadership, the style may change continually to meet the needs of others in the organization based on the situation. Pope Francis adjusts his leadership based on external factors and understanding the consequences of the results. In some cases, he will make a necessary swift decision, in others he is extremely methodical and researched. While he is known to embrace change and risk, he has also been conservative in some areas. Basically, he reflects on the influences, issues, and potential outcomes before determining which problem-solving approach to take.

The Contingency Theory of leadership is reliant upon various situational factors, a leader's preferred style, their capabilities and the competencies of their followers in a given situation. The effectiveness of leadership is dependent on matching a leader's style with the right situation. It is like Situational Theory because it emphasizes that here is no right one way and a person must take lots of factors into consideration. Like described in Situational Theory, Pope Francis examines all necessary factors and issues facing the Catholic Church and must determine how his skills in any area can be best applied to address the matter at hand. In cases where controversial positions have been addressed, Francis utilizes this strategy to carefully but sternly explain matters such as the Church's teaching on homosexuality, contraception and women priests. In the face of the media, he takes a more subtle and humble approach, as he has learned is the best way for the Church to appear publicly. To begin to make amends for the Church's treatment of sexual abuse scandals, Pope Francis personally asked for forgiveness for the large number of priests who abused their power. He assembled a commission to provide counsel on the correct protocol for dealing with sex abuse. Four of the chosen eight-member committee are women, which includes a woman who was sexually assaulted by a chaplain in Ireland when she was thirteen, and more than half of the members of the council are not even part of the clergy (Krames, 2015). This strategy implies that Francis is acutely cognizant of how to respond to crises based on how an audience or group of followers will interpret his actions.

Transactional Theory is predicated on the belief that social systems work best with a clear chain of command, where subordinates follow the commands given by their managers. Another assumption of the Transactional Theory is that people are motivated by reward and punishment. It focuses on the role of supervision, the organization, and the role of group performance. Within this leadership style, it is the responsibility of the leader or manager to make sure clear structures are established and subordinates understand what is required of them. When the work is assigned, it is then the subordinate's responsibility to fully carry out the duties, because they are now accountable. Transactional Theory leadership is "telling" style, allowing the person in charge to basically give orders. Whether or not the task results in a reward or punishment is based upon performance. The main drawback of the relationship between followers and leaders utilizing a Transactional Theory approach, is it attracts those who are largely motivated by money and rewards. In the case of Pope Francis, he can employ the "telling" style of transactional leadership. As the leader of the Catholic Church, his responsibility is to communicate his vision and delegate to his subordinates on what they need to do to carry out his vision.

The premise of this last style of leadership explains that people will follow a person who inspires them and if that person has vision and passion, they can achieve great things. The foundation of the Transformational Leadership technique is the vision and view of the future that will convert potential followers. Consistently selling the vision is a key component of this leadership strategy. Creating trust is a major factor in the Transformational Theory of leadership. Because of Pope Francis' ambitious agenda, he has earned the trust of people by tackling controversial issues of the church openly. He made financial reform a priority because it brought together the three iniquities that distress him more than anything else: corruption, exaggerated clerical privilege and indifference to the poor. He has recaptured segments of disenfranchised people and completely re-energized his flock. He also made it to the top of Fortune magazine's 2014 list of the World's Greatest Leaders and was named Person of the Year by Time magazine in 2013. He is successfully leading as a non-divisive change agent, with the ability to engage all people without alienating his base. Pope Francis' transformational leadership style will undoubtedly be his greatest tool in his future work to move the church from its hoard of doctrines mentality to a church that can stand up to modern humanity in the real world.

THE CONFLICT OF CHANGE

There is always the potential for trouble with major transformations, even more so when you add religious ideologies and politics. Pope Francis is keenly aware of his position as the Church's 21st century change agent. He knows that there is conflict occurring offstage and some of it will inevitably spill out into the public. The revolution of Pope Francis even has a name: the missionary transformation of the church. Right from the start of his pontificate, he has been laying the groundwork for major change and preparing himself and the Church for the inevitable pushback (Politi, 2015). The platform created by cardinals during the general congregations held in March 2013 were narrowed down to three key concerns: reform the Roman Curia to make it leaner and more efficient; clean up the Vatican Bank; and promote collegiality by institutionalizing frequent consultation between the pontiff and the College of Cardinals.

Pope Francis hit the ground running, but some that elected believe he has potentially gone too far. Reforming the Church structurally will affect the whole ecclesiastical system: the papacy, the curia, the Episcopal Conferences, the procedures for consultation within dioceses, and the responsibilities entrusted to women (Politi, 2015). One of his greatest challenges will be taking on the Church's battle of the repeated allegations of sexual misconduct of priests, which has resulted in the defrocking of 848 priests from 2004 – 2013. Pope Francis has a zero-tolerance position on sexual abuse. His announcements on other issues, some very critical, have been aimed at the whole church, using a full variety of modern media tools, which make it harder for the back-door bureaucratic inertia to tie him down. He has held a mirror up to the Catholic Church, preparing them to be ready to set aside the "we have always done it this way" mindset of the past. He is working to re-motivate the clergy, remove outdated administrative manners and forms that are no longer necessary. He wants an open church that looks the world in the face. He criticizes religious institutions that project a forbidding presence and parishes that simply ensure the performance of sacraments.

"I want to remind priests that the confessional must not be a torture chamber, but rather an encounter with the Lord's mercy which spurs us on to do our best... A small step, in the midst of great human limitations, can be more pleasing to God than a life which appears outwardly in order but moves through the day without confronting great difficulties." – Pope Francis.

Nonetheless, as every great leader, Rome's new president leading style has not always been the best. In fact, during the "dirty war", his authoritarian leadership style and the "impetuous" decisions he made affected his management as they revealed "his immaturity as a leader" and "caused others to mislabel him as ultraconservative" (Politi, 2015). During his exclusion in Cordoba following, his criticized leadership,

Bergoglio went through an “internal exile” (Ivereigh, 2015) that forced him to assess himself and get a better understanding of who he was and his religious work. Even though described as a period of suffering and depression, this involuntary exile, mainly filled with deep prayer and contemplation was a necessary evil. Indeed, this dark period of the pope’s life helped him know himself and focus his devotion.

A careful observation of his personality and leadership after that period reveals that his life as “a sinner” (Krames, 2015), as people of the slums, alienated by the Jesuits community (in his case), gave him a deep and true understanding of the lives of the outcasted. As Paul Valley (Pope Francis Biograph) explained, when Bergoglio was “... back in the city... an extraordinary journey had begun. It was to transform Jorge Mario Bergoglio into the Bishop of Slums...” (Krames, 2015) thus, the dark period gave birth to the “passionate defender of the disenfranchised...” (Krames, 2015). Furthermore, the head of the Holy See used different approaches to deal with different situations. In fact, as situational leader, he knows when to command and when to serve. Depending on the situation, he may use faith or common social values to obtain results. For instance, he used his pontiff title to mediate the renewing of U.S and Cuba’s diplomatic relationship while remedying to his social values to reach “non-customers” (Krames, 2015).

CONCLUSION

Pope Francis is an established great leader. To fully understand the essence and value of his leadership, we must not think of him as distinct from the historical context in which he is rising, his environment, as it shaped and mold him to the shepherd and true leaders he has become. From his early teenage years to his election as the 266th Pope, Rome’s new president has committed himself to a vision that has enabled him to capture many people’s attention, gain their support and get them to carry it out.

Despite the obstacles he faced, he has led the Catholic Church closer to its people by breaking the administrative walls that separate the clergy from the excluded. Through learned behavior he has acquired great leadership skills and experience in engaging people. In addition, by making inclusion a top priority, he sticks to his vision and ensures the implementation of his decisions by his followers. Pope Francis used various leadership styles to effectively convey a vision that is the foundation of the religious order that introduced him to the Holy See world: “find God in all things”. After only two years in his term, his holiness was able to impact Catholics and non-Catholics, to speak at the U.S house of representative and play a significant role in talks that led to the restoration of political relations between the U.S and Cuba. With such leadership capabilities, we believe that it is safe to say that Pope Francis is one of the greatest leaders this world has ever had.

The assessment of Pope Francis as a man and as a pope is two-fold. On one hand, he is a sharp leader with a take-charge attitude and an extraordinary capacity for his work, with the ability to centralize a fine mind with a clear sense of power. He is a true politician and by his own words, cunning. On the other hand, he provides a tenderness and fellowship that has won the hearts of millions of people around the world. He understands and wields his power of goodness but is not blind to the challenges of the Church in today’s world.

Pope Francis I is not afraid of using disruptive and innovation decision making approaches to shake up the status quo. He believes in assessment, instead of judgment. He believes that no one person is great than any other human being. The Pope is a man of compassion and virtue. The Holy Father is an inclusive, all-encompassing leader who understands the value of human life and the economy of exclusion and inequality. The Pope is confident, positive and chooses to see the best in people particularly if they have suffered hardships in life. He is a problem-solver and a global force of integrity, honor and dignified strength. Pope Francis, the 266th Pope of the Catholic Church, is the true epitome of an effective servant-leader.

REFERENCES

- BBC News. (n.d.). Profile: Pope Francis. Retrieved November 9, 2015, from <http://www.bbc.com/news/world-europe-21777141>
- BBC News. (n.d.). Why Did Pope Benedict XVI Resign? Retrieved November 11, 2015, from <http://www.bbc.com/news/magazine-25121121>
- Krames, J.A. (2015). *Lead with Humility: 12 Leadership Lessons from Pope Francis*. New York: AMACOM.
- Politi, M. (2015). *Pope Francis Among the Wolves: The Inside Story of a Revolution*. New York: Columbia University Press.
- Tapsell, K. (2014). Some Theological Problems with Facing the Truth. In *The Potiphar's Wife: The Vatican's Secret and Child Sexual Abuse*. Australia: ATF.
- The Holy See. (n.d.). Biography of the Holy Father Francis. Retrieved November 9, 2015, from <http://w2.vatican.va/content/francesco/en/biography/documents/papa-francesco-biografia-bergoglio.html>