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Institutional Leadership—The Historical Case Study of a Religious Organisation

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Institutional Leadership as Institutional Work

Notwithstanding institutionalism's relevance within organisation studies, the leadership of institutions is a topic that we can classify as largely overlooked. As an example, the 2008 edition of the *SAGE Handbook of Organizational Institutionalism* had a chapter on 'Institutional Leadership' (Washington, Boal, & Davis, 2008); however, the 2017 edition of the same volume has less than one page devoted to the leadership of institutions (see Kraatz & Block, 2017, p. 552).

Two reasons might contribute to the lack of studies on institutional leadership. First, institutionalism 'is creaking under the weight of its own theoretical apparatus' (Haveman & David, 2008, p. 588). This means that something as 'simple' as defining what an institution remains unclear. This limitation of institutionalism affects a plethora of concepts within the field: 'As these concepts become more general and cover a

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greater territory, their explanatory power weakens' (Alvesson & Spicer, 2018, p. 8). Second, leadership, although arguably the most studied topic in organisation studies, also remains a contested field. More specifically, 'the field of leadership studies has traditionally been leader-centered' (Crevani, Lindgren, & Packendorff, 2010, p. 77). Such characteristic of leadership studies hinders its integration into institutionalism with its emphasis on what is beyond the individual. Not surprisingly, then, there is 'a lack of institutional leadership ideas in the leadership literature' (Washington et al., 2008, p. 11).

That said, the leadership of institutions haunts some strands of the literature on institutionalism and neo-institutionalism. Two examples are 'institutional entrepreneurship' and 'institutional work'. On the one hand, the type of leadership needed to create or change an institution remains largely overlooked; on the other hand, even though institutional work 'link[s] quite well' (Kraatz, 2009, p. 59) with institutional leadership, the possible linkages have not been further explored.

Institutional work was initially defined as the 'purposive action of individuals and organizations aimed at creating, maintaining and disrupting institutions' (Lawrence & Suddaby, 2006, p. 215). That said, institutional leadership can be understood as part of 'institutional work'. As Kraatz puts it, leadership is part of 'the work involved in *governing, adapting, and reforming* organizational institutions' (Kraatz, 2009, p. 60, emphasis in the original). This leaves aside the work done by entrepreneurs to *create* an institution. However, it does include the work done to *reform* and *adapt*, id est, *change*, which is part of the work done by institutional entrepreneurs. Such overlap does attest to the fact that some of the concepts within institutionalism end up meaning 'everything and nothing' (Alvesson & Spicer, 2018, pp. 7–8). Therefore, in this chapter I will attempt a clarification of what institutional leadership is, of how it might be distinguished from institutional work more broadly and of how it can enlighten our own understanding of what stands for an institution. The latter is particularly important because it will help us to better delineate what separates the leadership of an institution from the leadership of an organisation. This has more potential to enlighten our understanding of institutional leadership if we analyse

an organisation which is itself an institution or part of a highly institutionalised field. Such organisation is the Society of Jesus, commonly known as the ‘Jesuits’, a Catholic Religious Order. This way of defining the Jesuits already points towards several distinct levels of analysis. First, the Jesuits are a religious organisation, and, in this sense, they could be simply classified as an ‘organisation’; second, the Jesuits are a Catholic Religious Order, which refers to an institutionalised ‘form-of-life’ (Agamben, 2013) within Catholicism; third, Jesuits are part of the Catholic Church which is one way of ordering life within the institutional order of religion.

In this chapter, I will analyse the Jesuits vis-a-vis the value of poverty. The reason for this choice is that poverty is a value that is shared by the various institutional levels I described above: poverty is the pillar of all Jesuit values (Jesuit institution); poverty is one of the three vows that any member of a Catholic Religious Order should do (the institutionalised ‘form-of-life’ (Agamben, 2013) that characterises any Religious Order member); and finally, poverty as an evangelical value should be pursued by any Catholic (the institution of the Catholic Church).

Methodologically, I will analyse historical primary sources that span almost five centuries. I will start by analysing how poverty became the fundamental value of the Jesuit organisation. This discussion will position the Jesuits in the poverty debates that go back to the twelfth century (see Agamben, 2013); then I will analyse government documents of the Jesuits relating to poverty, namely their General Congregation decrees and instructions on the management of their property.

The analysis of how poverty was conceptualised and governed over almost five centuries will allow us to revisit the relevance of values for understanding institutional leadership. Selznick famously said that institutions are ‘organizations infused with value’. (1957, p. 17) and that, as a consequence, institutional leadership is about ‘the promotion and protection of values’ (Selznick, 1957, p. 28). However, this definition raises the question of ‘how leaders can guard against the tendency to lose sight of institutional values’ (Besharov & Khurana, 2015, p. 60)? This chapter will contribute to this discussion by showing, through the Jesuit case, how the institutional leader’s role might be not about the preservation

of values, but about the constant search for specific values. This insight furthers our understanding of ‘procedural logics’ (Quattrone, 2015) and its critique of our obsession with the substantiation of values.

The Jesuits

The Jesuits are a Catholic Religious Order. Within Catholicism, there are two main forms of life. First, secular life, ‘Secular’ means ‘living in the world’, and therefore outside the ‘walls of a monastery’. Second, religious life. Those who live a religious life, traditionally inside the walls of a monastery, do it in seclusion and take the three vows of poverty, chastity and obedience. Religious Orders are organisations whose members adopt a religious ‘form-of-life’ (Agamben, 2013).

The Jesuits, as a Religious Order, are not secular insofar as they take the three religious vows of poverty, chastity and obedience. However, unlike traditional monastic religious orders, the Jesuits were founded so that their members would live immersed in the world. Therefore, the Jesuits did not adopt the most emblematic of monastic orders’ traditions, like the choir, the communal prayers and the monastic habit (O’Malley, 1993).

The fact that the Jesuits were not like other monks, living secluded within the walls of a monastery, led their founder, Ignatius of Loyola, to revisit many of the institutionalised ways of ordering religious life. Put differently: How can you live a chaste, obedient and poor life outside the walls of a monastery? Or, put yet in a different way: What are the effects of living outside a monastery on the understanding of the institutionalised values of chastity, obedience and poverty?

The three values of chastity, obedience and poverty are equally important in religious forms of life. Notwithstanding, for the purposes of this chapter we will focus on the value of poverty for two main reasons. First, poverty was part of important debates within the Catholic Church that go back to the thirteenth century (Agamben, 2013). This means that from an institutional point of view, the value of poverty within Catholicism has a century-old history. Second, and most importantly, poverty was considered by Ignatius the ‘wall that protects the life of a Jesuit’:

‘Poverty, as the strong wall of the religious institute, should be loved and preserved in its integrity as far as this is possible with God’s grace. The enemy of the human race generally tries to weaken this defense and rampart which God our Lord inspired religious institutes to raise against him and the other adversaries of their perfection. Into what was well ordered by their first founders he induces alterations by means of interpretations and innovations not in conformity with those founders’ first spirit’ (Jesuit Constitutions, §553).

Poverty thus emerges as a fundamental value of (a) religious forms of life and (b) the Jesuit order in particular. Furthermore, as I will discuss in the following sections, the value of poverty is critical to understand the institutional leadership of the Jesuit organisation.

Ordering Individual Values

As Agamben (2013) highlights, what underpinned the mediaeval debates around poverty was the possibility, strongly denied by the Catholic Church of the thirteenth century, that an individual could renounce their natural right to property. Such a possibility is made visible in the sixteenth-century text of the *Spiritual Exercises* (SE), as follows: *‘it is necessary to make ourselves **indifferent** to all created things, in regard to everything which is left to our free will and is not forbidden. Consequently, on our own part we ought not to seek health rather than sickness, **wealth rather than poverty**, honor rather than dishonor, a long life rather than a short one, and so on in all other matters. Rather, we ought to desire and choose only that which is more conducive to the end for which we are created’* (SE, §21, emphasis added). All this so as *‘to overcome oneself and **order** one’s life, without reaching a decision through some **disordered affection**’* (SE, §21, emphasis added).

The absence of any form of desire towards material goods/wealth thus becomes one of the values underpinning the Jesuit organisation. Poverty at the individual level is therefore translated as indifference towards wealth and poverty. That said, what becomes the target of ordering at the individual level are the affects: the important aspect is not materiality, but how the individual relates to it, how they feel and which affections are brought to the surface in regard to material objects.

'*Disordered affections*' (SE, §21) are affects that make the individual desire one thing more than the other. Indifference is therefore not a specific way of behaving, but a guiding desire (Certeau, 1973) of individual action: the individual only desires to become totally indifferent to outcomes that are equally good (Geger, 2012). This raises the question: if one is supposed to be indifferent to wealth and poverty, what is the role of poverty?

The indifferent individual and the absence of desire (Certeau, 2000) need to be constantly self-monitored, insofar as they are never fully attained: actions, thoughts and desires are permanently monitored and accounted for (see Quattrone [2004] for a discussion of this issue vis-à-vis accounting). In the SE, indifference is neither the target of any specific form of speech, nor is it framed as a form of 'counter-conduct' (see Munro [2014] for a discussion of counter-conduct). Indifference is simply defined as we have outlined above. However, even though the SE are a process whose logics are procedural and non-substantiated (Quattrone, 2015), they are performed under the guidance of what is called a *Spiritual Exercises* director. This means that the individual never performs the SE alone, but always under the guidance of someone whose function is to help assess the order or disorder of the individual's affections. It is through the constant and regular dialogue with the SE director that the individual orders their life and assesses their indifference. The SE's logics are therefore not only procedural (Quattrone, 2015), but also dialogical and relational. This is akin to Anteby's (2013) emphasis, when discussing the case of Harvard Business School (HBS), on those members of the faculty who are the guardians of the shared understanding about what constitutes HBS's moral pursuit. Anteby (2013) highlights the relevance of recruitment, socialisation and leadership for large-scale organisations which pursue moral projects, even though they do not substantiate what morality consists of, as in the case of HBS. The Jesuit organisation also emphasises, in its Constitutions, the vital importance of recruitment, socialisation and leadership. However, unlike the case of HBS as described by Anteby (2013), silence is replaced by processes that foster dialogue with an SE director or Superior/manager so as to reach a shared understanding of what constitutes indifference, eventually leading to individual and organisational order. We expand on this below through an analysis of the Jesuit Constitutions.

Ordering the *Corpus*' Values

Arguably, the most important aspect to consider when approaching the Jesuit Constitutions is their structure. In accordance with the modern way of charting thought (Ong, 2004), the Constitutions follow a determined order in the presentation of subject matters (Coupeau, 2010). That order is based on practical considerations, which means that the aim of the Constitutions, which is the proper governance of the Jesuit *corpus*, is only stated in the final chapters. The Constitutions can and should be analysed according to this, simultaneously taking into consideration that the aim of this legislative text is to fully regulate the governance of its members aligned with their characteristic '*way of proceeding*'. However, unlike monastic Rules, the Jesuit Constitutions do not substantiate every detail of the monk's life (Aldama, 1989; Coupeau, 2010). Instead, the Jesuit Constitutions outline a '*way of proceeding*' which is akin to what Agamben (2013) calls a 'form-of-life'.

The Jesuits Constitutions are divided into 10 chapters which trace the development of the indifferent Jesuit and the governance of the Jesuit '*corpus*'. The first 5 chapters deal with the socialisation and training of a Jesuit; Chapters 6 and 7 deal with the specificities of religious life, including poverty, and Chapters 8 through 10 deal with the governance of the entity. However, the outlining of a uniform 'form-of-life' (Agamben, 2013) does not occur via a detailing of everyday life, as in monastic rules (Agamben, 2013), but is achieved through the replication of a set of experiences. These experiences, part of the training of any Jesuit, are replicated over and over again. Among those experiences is the practice of the *Spiritual Exercises* (Constitutions, §65), to work for one month in a hospital (Constitutions, §66), to go on a pilgrimage (Constitutions, §67), to teach (Constitutions, §69) and to experience poverty (Constitutions, §254, §285, §287). In accordance with the rhetorical underpinnings of the Jesuit Constitutions (Coupeau, 2010), Chapters 6 and 7 represent the outcome of what is experienced after the 'training' the Jesuit underwent, and which is described as the Jesuit way of living a religious life. Part of this religious life is a life of poverty.

However, before we explore what it means to live in poverty, it is important to describe how indifference is framed within the Jesuit Constitutions: *'The members of this Society ought to be ready at any hour to go to any part of the world where they may be sent by the sovereign pontiff or their own superiors'* (Constitutions, §588). Put simply, indifference means to be fully available to go to any part in the world and perform any activity. This availability was, at the time, quite unusual, because life in the monasteries was characterised precisely by what Weber (1968/1978) termed *'stabilitas loci'*: after joining a monastery, a monk would spend his entire life in that same monastery, and have his day entirely regulated with great minutiae (Agamben, 2013).

It is intriguing how the Jesuits devised a *'way of proceeding'* that represented an extraordinary shift in comparison with other religious forms-of-life, which were focused mainly on ordinances (Aldama, 1989). The reason for such an option is well known: the need for flexibility and adaptability to different geographical locations (O'Malley, 1993). The Jesuit geographical dispersion, and the emphasis on the flexibility of the individual and the *'corpus'*, rendered it impossible to construct life *'as a total and unceasing liturgy or Divine Office'* (Agamben, 2013, p. xii), to share the monastic Rule's tension between the private and the communal, to put at the centre the *habitus*, to order life via the *'horologium'* or to enclose life in a disciplinary apparatus (Agamben, 2013). Even so, the Jesuit Constitutions shared with other forms of religious life an emphasis on poverty as a key tenet of such a life.

Agamben (2013) discusses how Franciscan monastic Rules pointed towards a *'form-of-life'* in which a theory of use (use of a property that is not individual, but communal) translated itself into an ethos, a form of life: *'What was in question (...) was not the rule, but the life, not the ability to profess this or that article of faith, but the ability to live in a certain way'* (Agamben, 2013, p. 93). This means that the *'way'* that was appropriate for monastic orders was poverty (Agamben, 2013). The Franciscans' rule and the identification of life with its form (a rule as a form-of-life) represented, in the thirteenth century, a major shift in the pastorate, one that Foucault (2009) does not acknowledge, but which Agamben (2013) explores. Although the first 5 chapters of the Jesuit Constitutions point

towards a coincidence between the form (the Constitutions and the experiences they devise) and life, they do represent a shift in the understanding of what a religious form of life meant.

Ordering a Poor Way of Life

Poverty is fundamental to understanding how order is achieved in the Jesuits. Poverty is about a ‘way of life’, not a substantiated ‘rule of life’. We expand below via an analysis of the ‘*Statutes on Religious Poverty in the Society of Jesus*’ (SRPSJ).

Poverty has three dimensions: individual poverty, expressed through a formal poverty vow that each individual undertakes; communal poverty, which relates to how the local community of Jesuits experiences poverty and finally a ‘common way of living in external matters’ (SRPSJ, article 3). First, individual poverty, which is about renouncing the natural right to property, points towards a ‘theory of use’ (Agamben, 2013): ‘No one should have the use of anything or dispose of it as his own’ (SRPSJ, article 1, 21, §1). This means that the individual has no property, but the community may have. This leads us to the second dimension, that of communal poverty. Communal poverty is made visible by a common ‘standard of living’ (SRPSJ, article 2, 28, §1) in which ‘superfluities are always to be avoided’ (SRPSJ, article 2, 28, §2). However, what is superfluous is not substantiated. The third and final dimension of poverty refers to a ‘common way’ of living in poverty and deals with ‘external matters’ (SRPSJ, article 3). The objective of this third dimension is to foster a ‘common way’ of being poor, without, again, ever substantiating what ‘being poor’ means. ‘Being poor’ is always referred to as an imitation of those who are poor. However, what characterises poverty or an individual as being poor is never defined. Poverty is a ‘manner of life’, something which is ‘entirely authentic’, ‘not becoming illusory’ (SRPSJ, Part 1, §G) and to ‘be adapted’ in ‘*creative fidelity*’ and ‘active indifference’ (SRPSJ, Part 1, §F, §R).

There is one element in the Jesuit Constitutions and in how poverty is conceived that may pass unnoticed: the role of the Superior/manager. The Jesuit Superior, just as in the case of the SE director, is the guardian

of poverty. However, unlike the Abbot of the monastery, his role is not to guarantee that the minutiae outlined in the Rules are observed, but to allow for a '*way of proceeding*' to be developed. The Jesuit '*way of proceeding*' unfolds (Quattrone, 2015) through a constant dialogue between the Superior and the individual, and between the Superior and the community he manages. It is not that the Superior commands poverty, but rather that what constitutes a poor 'manner of life' emerges out of constant dialogue. It is precisely in this sense that the logics underpinning Jesuit rationality are not only procedural (Quattrone, 2015), but also dialogical and relational.

Leading a 'Poor' Corpus

Unlike monastic orders' 'forms-of-life' (Agamben, 2013), the Jesuit '*corpus*' was an expanding global corpus in which the remote controlling of a geographically widely dispersed 'population' of individuals apparently underpinned the development of a unique constitutional framework (Knowles, 1966). However, the Jesuit constitutional framework revolves around 'indifference' and is not guided by any specific organising objectives, established purposes or objectified moral pursuits or values. Jesuit indifference can be made visible through the treatment accorded to poverty and to what Agamben (2013) defines as a 'theory of use'. In the case of the Jesuits, we see that use is more than the refusal of the individual's right to property. Jesuit poverty, and its underpinning theory of use, is about active indifference to material goods; in addition, it is about the ordering of a poor life via the manufacturing of a poor individual, a poor community and as a consequence a poor '*corpus*'. It is not the Jesuit '*corpus*' which imposes a particular conception of poverty on its members; poverty emerges out of individual indifference to material goods and is constructed relationally and in ambiguous terms. The only driver of poverty is indifference, which in this context means the absence of desire for any specific material goods.

The '*way of proceeding*' is the only rule the Jesuit organisation has. Ordering the globally dispersed population of individual Jesuits is the result of the construction of a 'form-of-life' (Agamben, 2013) (or '*way of*

proceeding’) in which the form (the rule) is coincident with the individual’s life (Agamben, 2013). However, whereas in traditional monasticism this was done within the confines of the monastery, as Agamben (2013) highlights, the Jesuits were not bound by any space that could ‘in-form’ their life. Indifference was what ‘in-formed’ life: ‘each one ought to be ready to undertake whatever may be assigned to him’ (Constitutions, §302).

Conclusion

Selznick describes the process of institutionalisation as one in which flexibility is lost: ‘the enterprise gains the stability that comes with a secure sense of support’ (1957, p. 7). The Jesuit order is interesting precisely because of how it balances stability with constant accommodation to local circumstances: be it at the individual level, or at the community level. In this sense, poverty is not a stable value. Instead, poverty is a value to be constantly interrogated. And it is the process of interrogation what poverty means that is stable (institutionalised), and not the understanding of what poverty is. Poverty is therefore not the result of ‘conscious design’, but of ‘unplanned adaptations to new situations’ (Selznick, 1957, p. 12). This allows the Jesuit order to evolve, change and adapt without ‘significantly changing the role and character of the organization’ (Selznick, 1957, p. 12).

However, if the changing understandings of poverty are not consciously designed, what is left for institutional leadership? Selznick (1957) provides us with an answer: ‘*the more precise an organization’s goals, and the more specialized and technical its operations, the less opportunity will there be for social forces to affect its development*’ (p. 16). And it is precisely in those situations in which ‘*goals are less clearly defined*’ (Selznick, 1957, p. 16) that institutional leadership is most needed. This contradicts our heroic view of leadership, according to which the leader is responsible for leading towards clearly defined goals, preferably defined by the leaders themselves. Institutional leadership thus emerges as ‘a kind of work done to meet the needs of a social situation’ (Selznick, 1957,

p. 22) in which the goals of the organisation are problematic instead of stable.

Selznick's (1957) insights are corroborated by the Jesuit case. More specifically, the idea that the 'less clearly defined' (Selznick, 1957, p. 16) the goals are, the more we need leadership is concomitant with the relational nature of leadership manifested in the Jesuit case. However, the Jesuit case furthers Selznick's intuition insofar as it frees it from the heroic view it seems to imply. Institutional leaders are not the only ones who protect and promote the institution's values. Instead, such protection and promotion emerge out of the relational nature of leadership that characterises Jesuit leadership. The constitution of poverty is the result of the dialogue between the Jesuit leader and their followers, which allows the Jesuit organisation to constantly adapt according to different times and places. Jesuits can operate in extreme contexts of poverty as well as in privileged contexts; individual Jesuits, unlike members of other Catholic Religious Orders, have no rules regarding the way they dress (the monk's habit is traditionally an exterior sign of poverty). These are examples of how the value of poverty is open and ambiguous, which is precisely what allows the Jesuits to adapt so easily to multiple contexts.

Such openness raises interesting questions regarding institutionalisation processes. The intuition that leadership is most needed when the organisation faces ambiguity is rather easy to grasp. However, institutionalisation processes always imply some form of stability which is at odds with openness and ambiguity. Moreover, the Jesuit case shows that leadership is not needed only in situations of ambiguity understood as extraordinary situations. Instead, ambiguity is understood as constitutive of the values guiding the institution: it is not that poverty needs to be redefined when the context asks for it; the point is that poverty is ambiguous by its own nature. Put differently, values and meanings do not need to be substantiated so as to generate action and maintain an institution (Quattrone, 2015). Institutional leadership and institutional work thus emerge as relational in their own nature: they are not about the maintenance, protection and promotion of specific institutional values, but about the constant interrogation of what such values mean according to different times and places.

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