



STUDIES

IN
THE SPIRITUALITY OF JESUITS

BX3701 .S88

v.40: no.1(2009:spring)

04/09/2008

Current Periodicals

**Governance in the Society of Jesus
1540–1773**

Its Methods, Critics, and Legacy Today

Markus Friedrich

THE SEMINAR ON JESUIT SPIRITUALITY

The Seminar is composed of a number of Jesuits appointed from their provinces in the United States.

It concerns itself with topics pertaining to the spiritual doctrine and practice of Jesuits, especially United States Jesuits, and communicates the results to the members of the provinces through its publication, *STUDIES IN THE SPIRITUALITY OF JESUITS*. This is done in the spirit of Vatican II's recommendation that religious institutes recapture the original inspiration of their founders and adapt it to the circumstances of modern times. The Seminar welcomes reactions or comments in regard to the material that it publishes.

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**GOVERNANCE IN THE
SOCIETY OF JESUS
1540–1773**

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STUDIES IN THE SPIRITUALITY OF JESUITS

41/1 • SPRING 2009

THE SEMINAR IN THE HISTORY OF THE CHURCH

GOVERNANCE IN THE

SOCIETY OF JESUS

1540-1773

MEMBERS OF THE SEMINAR

James T. ...

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STUDIES IN THE SPIRITUALITY OF RESULTS

James T. ...

James T. ...

the first word . . .

The report was matter of fact: the Brooklyn Diocese has targeted fourteen parochial schools for closing. This is an important event for any city, and *The New York Times* acknowledged its importance with a major story that covered the better part of a full page: two reporters, on-site interviews, several photographs. About midway through the article, "Our Lady of Angels" jumped off the page at me. Yes, my home parish may very well close its school, as might the adjacent parish, Our Lady of Perpetual Help. Amazing. When I graduated, early in the Eisenhower administration, the school served nearly two thousand children. The community of Sisters of Charity of Halifax occupied a huge convent that housed upwards of forty sisters. Some years later, as I recall, the number of students reached closer to 2,500, and a small community of Franciscan brothers arrived to teach seventh- and eighth-grade boys. The parish also bought some residential property on the block, took down the houses, and put in an additional schoolyard equipped with basketball courts that served as a neighborhood playground after school hours. Sundays it became a lot for the posh folk who drove the five blocks up from Shore Road.

As one of the parishioners in the *Times* article said so well, the school really served as an anchor in the neighborhood. It was a social hub. Not only did people gather for the relentless sequence of Masses in the school auditorium as well as in the huge church on Sunday mornings—there were no Saturday vigil Masses; Saturday was for confession—but dozens of organizations used the school building, from cub scouts and brownies to what we would now call "senior citizen" activities. The gym was home court to a full complement of CYO basketball teams, and every age bracket held regular dances amid the folding bleachers. The auditorium hosted annual St. Patrick's Day musicals: all performances sold out. Naturally, the interviewed parishioners were hurt or angry or disappointed or simply puzzled.

What puzzled me most was my own reaction. Here was the school that I recalled as one of the great educational experiences of my life, one that laid a wonderfully solid foundation for every level of schooling to follow, and I was coolly distant from the news that it may soon pass from the scene. The old parish, which a half-century ago had an auxiliary bishop as pastor and six or seven associate pastors, centered around the church building where I was confirmed, said my first Mass as a one-weekend celebrity, and from which I buried my mother, could no longer support a school. The news came as a surprise, but not a shock. In fact, there was no perceptible emotional reaction. I'd been through this too many times before. I thought of Hopkins: "Ah!

as the heart grows older, it will come to such sights colder": Brooklyn Prep, St. Andrew on Hudson, the house for post-juniorate studies gouged into the rolling hills outside Peekskill, N.Y., Woodstock, the retreat house in Monroe, N.Y., where I made my tertian retreat. A clean sweep. Every single Catholic institution that tried to educate or form me was gone. There is but one exception. I did a National Guard masters at Fordham before regency. Let this be a warning to the Fathers of Rose Hill that they should not get too comfortable in their present location.

Restructuring may be the gentlest word used to describe developments in the Catholic Church these days. Announcements of the closing or merger of parishes and schools come with such regularity that they are scarcely news anymore. We seem in the midst of a perfect storm of factors that doesn't seem likely to abate in the immediate future. The number of active priests continues to drop. Old men hang on, serving several ministries as best they can at a time when their lay counterparts are enjoying the rewards of retirement with their grandchildren. They are the true heroes of the contemporary Church. Young Catholic men have many other career options besides the traditional three: cops, crooks, or clerics. In addition, fewer families seem to look upon priesthood as a choice they would encourage for their sons, especially after investing in a college education for them. In discerning one's call to priesthood or religious life, the support of cohesive parish life, beginning with the parochial school and the altar boys and continuing with a range of youth activities, may not be as powerful as it once was. Catholic culture, once sharply defined and in some respects admittedly insular, has shifted toward the mainstream. Sociologists can analyze the many factors and come up with many explanations, but the bottom line is that dioceses and religious orders simply can no longer continue all their previous commitments. In many instances, there are no alternatives: schools and churches must merge or close altogether. We take it for granted, at least when it happens somewhere else.

Finances enter into the picture, as well. With distressing regularity we read of some diocese or religious order paying out millions to settle sex abuse cases. Many Catholic church and school buildings have reached an age when they are in desperate need of major repair, possibly at a cost that is simply prohibitive for the dwindling numbers of parishioners. Prudence demands closing them down before they fall down. With fewer priests and religious working for a minimal diocesan stipend, payroll costs have soared. The most obvious example is the salary scale for lay faculty in parochial schools and Catholic high schools. We want to attract and hold competent teachers, and justice demands paying them a wage commensurate with their services. Even if there were no school attached to the parish, congregations may still have to provide compensation for lay directors of religious education, music ministers, office staff, social workers, hospital chaplains, custodians and financial managers. Not all of these positions can be filled by volunteers. Many Jesuits can remember the days when we had ten or fifteen scholastics on a high-school faculty. Now in the same schools there may be only one or two Jesuits on the entire staff. As Jesu-

its, we've gotten through the transition by raising tuition exponentially. Parishes and most parochial schools don't have that option.

A third element has been attributed to demographic shifts. Catholic populations have drifted away from urban centers, leaving the huge parishes in the central city empty and underutilized. Available resources must be directed to the suburbs to accommodate the influx of newcomers. Building a church is a high priority. Adding a parochial school and planning to staff it is a commitment few dioceses or parishes can afford to make in every instance.

The story in the *Times* stirred recollections (of dubious accuracy, to be sure) of my own experience of Our Lady of Angels. I remember the parish as a middle-class enclave of Irish Americans at the point where Brooklyn bulges out into the Harbor toward Staten Island. It was bordered by the Italians of Bensonhurst, the Scandinavians of Sunset Park, and the military enclave of Fort Hamilton. The streets teemed with children from large Catholic families: the side streets were a constant round of stickball and street hockey; the playgrounds hosted endless basketball games. Memory stands in the way of truth. That neighborhood ceased to exist years ago. Even in the 1970s, when I made a weekly trip to the old neighborhood to visit my mother, I noticed how quiet the streets had become. One rarely saw a game of stoopball or noticed a baby carriage outside the shops on Third Avenue. Elderly people stayed on in rent-controlled apartments, while their children moved out to Long Island or New Jersey. As apartment buildings and brownstones emptied out, they were converted into higher priced condominiums for DINKs (dual income, no kids), who work on Wall Street or Madison Avenue. The neighborhood shopping area, home to familiar drug stores, bars, delis, and the like, began to include specialty boutiques. I recall passing by a shop window featuring designer leather jeans for \$800. A Syrian and a Greek restaurant elbowed their way in among the family diners, pizzerias, and soda fountains. Imagine: falafel or hummus available on Third Avenue!

Change was in the air, but I wasn't particularly adept at sniffing it out. The sturdy buildings from the 1920s and 1930s were still in place. Emerging from the subway station at Sixty-ninth Street, meant entering a time warp, and maintaining a delusion. The ornate Protestant churches, with spacious well-manicured lawns, still decorated the avenues, but I never thought to wonder what their congregations looked like on Sundays. From talking to the one cousin who still remains in the old neighborhood, I gather Our Lady of Angels still draws large numbers on the weekends, but the Mass schedule has been cut back considerably from the days of the revolving door liturgies of fifty years ago. The parish school, I'm told, now serves about 180 children, and some sections of the building have been rented out to outside organizations.

Naturally, according to the *Times* story, the people of the old neighborhood were upset at the prospect of a school closing, as they are in every other part of the country. Reading about these events elsewhere, one could easily have predicted the reactions. The parishes and their schools serve as a living

repository for the Catholic memory. Removing either constitutes removing part of a person's Catholic identity. Some are angry and vow to hold protests and sit-ins to force decision makers to change their mind. Some want to roll up their sleeves, raise more money and attract enough new students and church members to keep going for a few more years. Some are bitter at what strikes them as the cold, unfeeling way the decision was made purely for financial considerations: *they* don't understand what this means to us. Bitterness can enter in because of the apparent injustice of it all, after their years of loyal support: "I've had it with an institution that treats people in this way." It's all understandable, all reasonable and yet all misleading.

People who are deeply committed to a school or a church may be the least capable of weighing options and making hard decisions. At the same time there is always the suspicion that those at the top really don't really appreciate the situation here, in this parish, with this history. It seems that bureaucrats in some remote central office just look at the ledgers and determine our fate. This is the tension that exists in any large organization, from a corporation with local branches to a church with individual dioceses and parishes. Local administration often sees things differently from the home office.

Surely the Society of Jesus, even in its early formative years, was not exempt from these conflicts. Almost from its founding, the Society began sending its members along trade routes to the farthest reaches of the known world. The Fathers General and their Curias held full responsibility for the works to be undertaken, yet how could they evaluate the ministries on the ground half-way across the world? How could they possibly make decisions about those that should be supported by additional commitment of men and financial aid, and those that should be discontinued in favor of other more promising apostolates? The Jesuits in distant regions, in Europe as well as Asia and the Americas, surely knew the situation on the ground and were invested in the work they were doing, but how could they grasp the political and economic complexities of the universal Church and the evolving kingdoms of Europe? The local Jesuits were ingenious in adaptation, but how could their innovations be tested against fidelity to the Institute, the charism of the Society, and the mission entrusted to them by the Pope and Superior General?

These questions were not easily resolved, especially in an age without teleconferencing, e-mail, and one-day national meetings in airport hotels. For the past several years, Dr. Markus Friedrich has burrowed into the archives at Rome and ransacked the literature to try to discover how the early Jesuits struggled to balance central authority in Rome with local autonomy. The early generals borrowed from the traditions of medieval orders, yet innovated in order to meet the particular needs of the young Society. They struggled, often amid dissent, to devise organizational structures and networks of communication to help the Society grow through its years of worldwide expansion. He concludes that the early Jesuits were not organizational geniuses, since their solutions did not achieve their intended purposes in many cases, but that they were clever enough to borrow from secular political culture to work toward a

workable accommodation with astonishing complexities. Not surprisingly for anyone who knows Jesuits past and present, he discovers that personalities often shaped policies.

Both stories converge. Whether this issue is closing a parish school in Brooklyn in the twenty-first century or establishing a global religious order in the early-modern period of European history, those involved in decision making both need effective organizational structures and networks of communication to bind various sectors together. It's amazing how each situation sheds light on the other. I'm confident readers will find Dr. Friedrich's essay fascinating and illuminating.

As a final prenote to this issue, the Seminar is grateful to our former colleague and current friend, John O'Malley, for initially putting us in contact with Dr. Friedrich, and we are grateful to the Jesuit Institute at Boston College for providing him with the resources to complete this study for us. Finally, we are grateful to Dr. Friedrich himself for spending a weekend with us, listening to our often contradictory comments with good humor, and creating a splendid issue of *STUDIES* for our readers.

Richard A. Blake, S.J.

Editor

The first section of the report discusses the importance of the project and the role of the research team. It highlights the need for a comprehensive study on the impact of the proposed changes on the organization's operations and the well-being of its employees.

The second section provides a detailed overview of the methodology used in the study, including the selection of participants, the data collection methods, and the statistical analysis techniques. This section also addresses the limitations of the study and the steps taken to ensure the validity and reliability of the findings.

The third section presents the results of the study, showing a significant increase in employee satisfaction and productivity following the implementation of the changes. The data also indicates that the proposed changes have led to a more efficient and effective organizational structure, resulting in cost savings and improved service quality.

The fourth section discusses the implications of the findings for the organization and the broader industry. It suggests that the proposed changes are a viable and effective strategy for improving organizational performance and employee well-being. The study also identifies areas for further research and provides recommendations for future studies.

The fifth section concludes the report, summarizing the key findings and the overall impact of the study. It emphasizes the importance of ongoing monitoring and evaluation to ensure the long-term success of the proposed changes and the well-being of the organization's employees.

The report concludes with a final statement on the significance of the findings and the potential for future research in this area. It reiterates the need for a data-driven approach to organizational change and the importance of involving employees in the process.

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I wish to express my gratitude for the invitation to meet with the Seminar on Jesuit Spirituality to discuss the ideas in this paper in person. The members encouraged me to address the recent developments and helped generally with many important ideas. The Jesuit Institute at Boston College was an ideal environment to work on this paper.

M. F.

Dr. Markus Friedrich grew up outside Munich and earned his M.A. in Modern History/Medieval History/Philosophy and his Dr. Phil. from Ludwig-Maximilians University in Munich. He spent a year as a visiting scholar at Duke University, in Durham, N.C. He currently holds the position of assistant professor at the Johann-Wolfgang-Goethe University in Frankfurt. During the current year he is a visiting fellow of the Jesuit Institute at Boston College. He has published several articles on early Jesuit history and is currently working on a book-length study of organizational structures and communications networks within the early Society of Jesus.

Governance in the Society of Jesus: 1540-1773

Its Methods, Critics, and Legacy Today

Shortly after its founding, the Society of Jesus rapidly grew in numbers and dispersed across the world. These developments challenged the concept of centralized authority, so important to Ignatius. In trying to preserve unity in the diaspora, the early Jesuits adopted the practice of mandated correspondence with Rome. They also struggled to find the organizational structures that would balance the Ignatian value of a clearly hierarchical administration in the Curia with the need for flexibility and adaptation on the local scene. Outspoken critics among the Jesuits themselves argued for alternative forms of government. Some of these issues remain unresolved today.

In its Decree 5, "Governance at the Service of the Universal Mission," the recent Thirty-fifth General Congregation treated the topic of Jesuit government. The ideas expressed in this text try to cautiously adapt traditional structures to the changing realities of the twenty-first century. The more important topics of Decree 5 include the relationship of central and local power, the procedures of decision making, the professionalization of administrative performance, and the role of internal communications. While a "reorganization" of the central government is envisioned (D 5, 7-14, also 1a), the very existence and necessity of a strong and powerful central government is in itself simply taken for granted. Echoing ideas of Ignatius and especially Polanco, extensive administrative structures are thought to be particularly beneficial for the strategic "planning" of activities, especially of ministries and missions (D 5, 28d; D 3, 37). Undergirding this commitment to planning is the order's attachment to "effectiveness," which harks back to Ignatius's con-

stant concern with “magis” and constitutes in Decree 5 a major administrative objective.¹

Most of these concerns have accompanied the Jesuits’ thought about their order’s administration for a very long time. While some of the solutions and approaches of GC 35 are new and innovative, the issues themselves have a long historical pedigree. The following essay does not attempt a historical commentary on Decree 5. Yet in highlighting several important dimensions and features of Jesuit administrative history since 1540, I hope to provide some historical depth to many of the issues discussed at the recent general congregation. This will be done in parts 1 and 2.

Decree 5 especially attempts to strengthen local and regional authorities, possibly at the expense of the provinces, which are subjected to a general “process of reflection” (D 5, 24–26). Such adjustments seem particularly timely, given the recent experiences of a rapidly globalizing world. Yet the issue had already been forcefully discussed in the early years of the order. There were Jesuit voices in the sixteenth and seventeenth centuries that also argued in favor of a more localized and

There seems to be a consensus that Ignatius both borrowed heavily from earlier orders but also departed from their traditions in many ways.

regionalized organization and protested against what they viewed as unwarranted centralization and bureaucratic overload. A prominent example was the Spaniard Juan de Mariana (1535–1624). His critical *Discurso de los grandes defectos que hay en la forma del gobierno*

de los Jesuitas will be discussed more fully in section 3. Certainly, there is no direct link between Mariana and contemporary Jesuit thought. In no way is it suggested here that Mariana could or should be seen as a direct precursor or role-model for contemporary discussions. Still his criticism of Jesuit governance merits attention because it helps us to understand that the administrative culture that ultimately came to shape the Society of Jesus (and still shapes it today in many ways) was not without alternatives and certainly was not evident per se. While many

¹“Effective” in its various grammatical forms occurs no less than thirty-six times in the six Decrees of GC 35. There are two additional occurrences for “efficient” and “efficiency.” I use a computerized word-counting function to determine these numbers. The “magis” is mentioned in D 2, 22.

structures of Jesuit government now might seem natural or quintessentially Jesuit, they in fact came into being only after much opposition and through highly contested choices. Mariana questioned many of these early-modern choices and can thus be helpful in understanding better how Jesuit administrative culture was forged through preference for certain options at the expense of other possible alternatives. While traditional Jesuit historiography has seen Mariana mostly as the “disobedient” trouble maker, his opposition should rather be taken seriously as an early-modern attempt to rethink many aspects of Jesuit administration in a creative way.

I. The Historical Context

Jesuit government was not created without context. For instance, Jesuit administration needs to be placed in the long tradition of Western religious life. There seems to be a consensus that Ignatius both borrowed heavily from earlier orders but also departed from their traditions in many ways. That the *Institutum* broke with many older traditions was an obvious but very ambivalent fact for many Jesuits.² Yet many aspects of Jesuit institutional organization also had well established precedents. For instance, the tendency to concentrate government in a curia, preferably in Rome, predates the Jesuits. The very idea of a general superior also started to take shape in the Middle Ages, as did the institution of general congregations or chapters.³ But to these well-known features, Ignatius, Polanco, and other early Jesuits added new details. And perhaps even more importantly, they refashioned much of the existing tradition and interpreted established institutions in a new way. Perhaps their most outstanding addition to established tradition was the creation of an unrivaled network of administrative correspondence. Where did this new mental framework come from?

²For critical views see the section on Mariana below. A more positive approach is found, for example, in Sforza Pallavicino, *Vindicationes Societatis Iesu* (Rome, 1649), 2, although the author does acknowledge that the novelty is a major point stirring hatred against the Jesuits. Pallavicino actually engages directly with Mariana’s more pessimistic approach; see *ibid.*, 93–101.

³See the relevant entries in the *Dizionario degli Istituti di Perfezione*, 10 vols. (Rome: San Paolo, 2003).

Polanco explicitly mentioned two models.⁴ An obvious point of reference was the mercantile world. The big Italian, German, and Spanish firms were international enterprises, and a constant flow of letters was necessary to coordinate their activities. While these exchanges were creating particularly dense networks through Europe in the sixteenth century, they were also extremely specialized, dealing mostly with the transfer of money and economic details like prices and the availability of goods. Only one area of Jesuit communication, although an extremely important one, is strictly comparable to these merchant letters: the correspondence of Jesuit procurators. The second point of reference for Polanco when talking about administrative correspondence was the Protestants communities. He remarked that the new churches had established a well-developed culture of communication in order to unite their diaspora. Obviously, and not entirely without reason, Polanco saw a parallel between the Jesuits' and the Protestants' dispersal throughout the world and thought the Protestants' communication strategies exemplary.

A new understanding of politics emerged that was meant not only to guarantee justice, but also to guide and steer the social body to proper and effective functioning.

out the world and thought the Protestants' communication strategies exemplary.

In this paper I suggest a third context for Ignatius's and Polanco's organizational thought: early modern political culture in the widest sense. Ignatius had grown up

with connections to the emerging Spanish state and would have known about major political developments there. John Futrell, for instance, has made connections to Spanish political theory.⁵ Though to my knowledge neither Ignatius nor Polanco ever cited the Italian city-states as models, they should be included as an important source of possible inspiration. Ignatius and his early companions had spent significant time in Venice, perhaps the most important hub for the exchange of political and other information in early-modern Europe.⁶ Also, the diplomatic

⁴*Sancti Ignatii de Loyola Epistolæ et Instructiones*, 12 vols., Monumenta Historica Societatis Iesu (reprint, Rome, 1964–58), 1:536–41 (Polanco to the Society of Jesus, July 17, 1547). Hereafter this source will be abbreviated to *Epist.*

⁵John Carroll Futrell, S.J., *Making an Apostolic Community of Love: The Role of the Superior according to St. Ignatius Loyola* (St. Louis: Institute of Jesuit Sources, 1970), 61 f.

⁶Filippo de Vivo, *Information and Communication in Venice: Rethinking Early Modern Politics* (Oxford: Oxford University Press, 2007).

revolution that had been occurring in Italy since the mid-1400s is a likely point of reference. The developing modern diplomacy was, among other things, founded on an ever-increasing amount of correspondence connecting the city-states to their ambassadors abroad.⁷ The resulting exchange of letters is one of the closest parallels to the Jesuit system of communication. An even more obvious context for administrative developments were the Papal States, one of the most prominent and effective prototypes of modern state building.⁸ But also the developments in the government of the universal Church provide significant parallels. Recently, the popes' growing reliance on briefs instead of bulls has been mentioned as a possible precedent for Jesuit letter writing, especially since Polanco had worked in the papal bureaucracy before he entered the Society.⁹ In addition, the emerging system of papal nuncios, the Church's equivalent to diplomats and ambassadors, was using a system of correspondence that shared several features with the Jesuits'.

Although I would not argue that any one of these groups, states, enterprises, or institutions should be seen as *the* direct and/or predominant source of inspiration for Jesuit government, I would claim that they took part in broader historical developments that were enthusiastically shared by the Society of Jesus. Two of them seem particularly relevant here. First, the idea that the performance and shape of social bodies could be manipulated and molded by governmental planning and activity was becoming more and more widespread. A new understanding of politics emerged that was meant not only to guarantee justice, but also to guide and steer the social body to proper and effective functioning. Early modern politics, in Marc Raeff's words, were implementing the

realization that the social and political structuring of human activities was to take place *hic et nunc*, within the broader framework of a conception of the universe which asserted that nature could be understood and acted upon through discovery of laws or patterns that could be expected to apply not only in the present but also in the future.

⁷See Francesco Senatore, *Un mondo de carta: Forme e strutture della diplomazia sforz-sca*, Mezzogiorno medievale e moderno, no 2 (Naples: 1998).

⁸Paolo Prodi, *Il sovrano pontefice, un corpo de due anime: La monarchia papale nella prima età moderna* (Bologna: Saggi, 1982).

⁹I owe this point to an extremely stimulating talk delivered by Paul Nelles from Ottawa at the Sixteenth-century Studies Conference, 2007, held in Minneapolis, and to ongoing personal communication with him.

Raeff in fact does associate this new idea of “social engineering” with the Jesuits, but only through a highly speculative allusion to the Paraguay Reductions. More pertinent, from my point of view, is the internal governmental activity of the order.¹⁰ We will see very shortly how the central Jesuit government in Rome was considered to be such an agent for setting directions. As Joseph Cortesone said already in 1570, “Three things are necessary for preserving the Society of Jesus: learning, spirit, and government (*le lettere, il spirito, et il governo*). The last one is the most important.”¹¹

A second, but connected, mental shift occurred with the growing appreciation of up-to-date information for governance and decision making. At least to a certain degree, as research has argued for a long time, only in the Early Modern period did political and social decision making become empirical in the way that has become familiar to later centuries. Associated with names like Machiavelli or Bodin, politics became the realistic “art of what is possible,” based on a thorough assessment of the current status quo. Once again, the Jesuits were no strangers to these broader trends. It seems fair to call the *Spiritual Exercises*, among many other things, a routine for decision making, in which the thorough, open, and realistic assessment of the current status quo was a key aspect. After all, one of the most crucial concepts of the *Exercises* is discernment or *discretio*. When Ignatius started using the concept of *discretio*, however, it already had a long tradition which inevitably also

¹⁰See Marc Raeff, *The Well Ordered Police State* (New Haven: Yale University Press, 1983), 39f. The Jesuits come into play on p. 30f. His statement regarding the Reductions has at least equal truth for Jesuit internal administration: “It is hard, though, to escape the impression of a basic similarity of attitude toward administrative leadership on the part of Jesuit fathers and contemporary secular officials in Europe.” Apart from the interest in the Jesuits, Raeff’s important insights have been taken up by an extraordinarily wide range of research, especially in Germany (*Policey-Forschung*); see, André Holenstein, “Gute Policey” und lokale Gesellschaft im Staat des Ancien Régime: Das Fallbeispiel der Markgrafschaft Baden(-Durlach), 2 Bände, Frühneuzeit-Forschungen no. 9, vols. 1 and 2 (Epfendorf 2003), or Thomas Simon, “Gute Policey”: Ordnungsleitbilder und Zielvorstellungen politischen Handelns in der Frühen Neuzeit, Studien zur europäischen Rechtsgeschichte, Bd. 170 (Frankfurt am Main, 2004).

¹¹Ladislaus Lukács, ed., *Monumenta Pædagogica Societatis Iesu*, 7 vols. (Rome, 1965–92), 2:869. In a well-known article, Gian-Mario Anselmi has convincingly interpreted this piece in a Foucaultian way as evidence for a Jesuit “gouvernementalité.” See his “Per un’archeologia della *Ratio*: Dalla ‘pedagogia’ al ‘governo,’” in Gian Paolo Brizzi, ed., *La Ratio studiorum: Modelli culturali e pratiche educative dei Gesuiti in Italia tra Cinque e Seicento* (Rome, 1981), 11–42.

shaped the Jesuits' understanding of the term. Over the centuries, the term had acquired many different connotations. While never losing its relation to the biblical discernment of spirits, the term had been also closely associated with *prudence* and, hence, had developed many political connotations. As a moral category, *discretio* meant the evaluation of individual acts based on their circumstances, both retrospectively (confession) and regarding the planning of future activities. This could at times become a highly rational or natural act, based on exact investigation of individual contexts.

For the Jesuits, it seems, the multi-dimensional concept of *discretio* served as an umbrella term to integrate both spiritual and administrative decision making. Certainly, the rational routines of the third time of election (*SpEx* 178–83) could be and were easily applied also to administrative routines. Just exactly how rational and how spiritual the Jesuits understood each single act of *discretio*, is hard to tell. But perhaps the point was precisely to bridge this gap. By using one concept that could at the same time be highly rational or highly spiritual, political or religious, many kinds of reasoning could be positively acknowledged. Decision making, if labeled *discretio*, could be either strongly empirical and rational or spiritual and religious without discrediting the other option. In any case, spiritual or not, the concept provided the order with a methodical and strongly empirically grounded routine for decision making in which also the systematic gathering of information played a crucial role.

Interaction between the center of power and its local representatives also become more regular, steady, and predictable, a major consequence and impetus to increase the volume of correspondence.

In early-modern Europe, this trend towards information-based policy making was combined with a preference for monarchical structures and centralization. Kings and popes should no longer exert their power by touring their realms constantly and governing on the spot. Their power should rather be flowing through a series of institutions from one centralized location, be it El Escorial, Versailles, or Rome. Furthermore, governance, here understood as the act of governing, was relying more and more on written transactions. This process started in the Middle Ages and accelerated in the thirteenth and fourteenth centuries in Northern Italy. Interaction between the center of power and its lo-

cal representatives also become more regular, steady, and predictable, a major consequence *and* impetus to increase the volume of correspondence. Moreover, the letters written for administrative purposes were more and more expected to convey standardized information on local circumstances, so that faraway decision making could rely on adequate descriptions of the local situation in an authoritative form. This, in turn, implied the development of new forms of safeguarding the quality of the information conveyed, for example, through questionnaires, forms, and clear rules for writing and describing.

This broad context of early modern political culture provides the most useful context to analyze developments in administration and communication. The following sections seek to sketch out what this meant for the Society of Jesus.

II. Governing the Society of Jesus

Communications and the Central Curia

Ignatius and Polanco not only implemented a certain scheme of government, but they also were highly explicit about why they were choosing this particular institutional framework. They not only sketched a blueprint for administration (the *Constitutions*), but also developed an administrative theory. Most of these reflections on the best structures for effective governance were expressed in a language that was not distinctively religious or exclusively ecclesiastical. Rather, the Jesuits thought in very pragmatic ways about their own social body, which, they felt, was following the same principles of social life that applied to any social organization. Polanco nicely explained why such a perspective was possible:

If we observe constantly what is happening in different regions of the world, we will be able to focus on the crucial problems and attend to them in a special way. Although we can achieve something in a certain region, the same means could achieve much more somewhere else. This, however, escapes us if we are not constantly informed about all events in all regions where Jesuits are active. Otherwise, we are in the dark like the blind. Of course I do know that God through his omniscience knows our affairs much better than we do and orders them better than we would ever be able to. Nonetheless,

God also wishes for us to contribute all that we can, although without ever losing faith in His eternal support.¹²

For Polanco, the human perspective on administration and governance obviously had a very positive connotation. He is echoing the traditional Thomistic idea that grace does not contradict nature, but perfects it. Put the other way around, one has to build an advanced organizational infrastructure because this will contribute positively to achieving the ultimate goal. Thinking about bureaucracy and administrative minutiae, then, is not contrary to a religious calling but part of the attempt to be most efficient in working for God's glory. Not all the early Jesuits were equally eager to follow this line of thought: when Nicolás Bobadilla openly displayed a disinterest in Ignatius's letters, he was reacting against the order's growing institutionalization. As John O'Malley has pointed out, Bobadilla preferred a more itinerant and less regulated form of activity.¹³

The first half of Polanco's quotation described two of his most important ideas for the central government. He was, first of all, concerned about an overview of all Jesuit activities and their current situation. This idea of total overview powerfully connected governance to information management. As was customary at the time, the Jesuits metaphorically associated such a perfect overview with an elevated position above the ground.¹⁴ It was thus not only for the sake of rhetorical flourish when Claudio Acquaviva claimed that the "Roman Curia is sitting on a high tower and is thus able to take in the status of the entire Order with one single glance."¹⁵ The General was using a well-known metaphor that was widely employed in early-modern Europe to articulate this key as-

¹² Once again, I cite *Epist*, 4:536–41 (Polanco to the Society of Jesus, July 17, 1547).

¹³ John W. O'Malley, *The First Jesuits* (Cambridge Mass.: Harvard University Press, 1993), 332–40.

¹⁴ See Denis Cosgrove, *Apollo's Eye: A Cartographic Genealogy of the Earth in the Western Imagination* (Baltimore: Johns Hopkins University Press: 2001) for context, but without reference to the history of administration.

¹⁵ Letter of General Claudio Acquaviva to the entire Society of Jesus (July 3, 1602). The Italian version speaks of Rome where "quasi da un'alta torre potiamo in un occhiata perveder lo stato della Religione" (Archivum Romanum Societatis Iesu (henceforth: ARSI), Inst 122, fol. 50^r) whereas the Latin reads "Nos sane, qui ex hoc loco, tamquam ex specula, totius Ordinis nostri statum uno aspectu contemplari possumus," in *Epistolæ præpositorum generalium ad patres et fratres Societatis Iesu* (Ghent, 1847), I:283.

pect of governance. Such panoptism was considered a basic condition for good and effective governance.

The second important aspect of Polanco's quotation is this intimate link between a government's being well informed and its effectiveness. He wants the Jesuits not just to do some good but to be as efficient as possible. Ignatius himself was often concerned with efficiency.

If we understand that process as a tendency to organize decision making into regularized routines following in a prescribed sequence and relying largely on standardized writing, then the Jesuits clearly participated in this trend.

He was thinking in terms of "more," and *magis* was a highly important, spiritual concept for him. But as Polanco insisted, striving for efficiency also had an administrative dimension. It implies a thorough planning of activities, a careful balancing of options, the imagination of alternative outcomes, and a total overview of what was going on not only

here and there, but everywhere. Polanco's quotation forcefully asserts that a great deal of the Society's effectiveness is caused by God alone. But Polanco also held that effectiveness is a function of information and administrative acumen. Being well informed became a *conditio sine qua non* for good (that is, effective) governance.

This preoccupation with efficiency resulted in a culture of regular counting and documentation of achievements.¹⁶ Counting was a favorite tool when the Jesuits came to review a year's successes. The *litterae annuae*, for instance, are full of numbers and tables displaying the exact numbers of confessions, conversions, or sermons by a single missionary or a Jesuit institution.¹⁷ It is unlikely that these tables were used as tools for policy making as one would expect today. Nonetheless, they were proud representations of what had been achieved over the previ-

¹⁶Key research includes Tore Frängsmayer, J. L. Heilbron, and Robin Rider, eds, *The Quantifying Spirit in Eighteenth Century* (Berkeley: University of California Press, 1990); Andrea Alice Rusnock, *Vital Accounts: Quantifying Health and Population in Eighteenth-Century England and France* (Cambridge University Press: Cambridge, 2002); David Glimp and Michelle Warren, eds., *Arts of Calculation: Quantifying Thought in Early Modern Europe* (Basingstoke: Palgrave Macmillan, 2004).

¹⁷See Markus Friedrich, "Circulating and Compiling the *Litteræ Annuae*: Towards a History of the Jesuit System of Communication," in *Archivum Historicum Societatis Iesu* (2008): 1–39, esp. pp. 29–35.

ous twelve months and clearly indicated where each province or establishment stood at the moment. Whether it was the numbers' spiritual value for edification or the usefulness for propaganda, documenting efficiency clearly was a major concern for the Jesuits.

As did most of their contemporaries, Polanco and Ignatius associated informed and effective governance with a centralized institutional framework. Information and power should both be concentrated in one central point. To use modern language, the Jesuits clearly attempted to correlate the flow of information within a social organism with this organism's institutional structure. In fact, they conceptualized both in tandem. When the *Constitutions*, for instance, strongly recommended that the general reside in Rome, they did so out of bureaucratic convenience: this was the location most "favorable for communication between the head and his members."¹⁸ More importantly, the idea of overview directly translated into hierarchy.

Most early-modern Jesuits called the Society's constitution "monarchical," even as the assistants and the several congregations were introducing an element of "aristocracy."¹⁹ Harro Höpfl, in an important recent monograph, has shown just how strongly hierarchical thought permeated most of Jesuit political theory.²⁰ He attributes this preference for hierarchical organization exclusively to the idea of obedience. By doing so, however, he unnecessarily diminishes the role of administrative convenience. The relevance of information management for Jesuit administrative thought thus escapes him; yet this was a major issue at stake here. While the virtue of *obedientia* did play a crucial role in the Jesuits' preference for social hierarchies, it was not the only reason behind it. Obedience was also the result and not only the condition of Jesuit hierarchical thought. In fact, the informational dimension of hierarchy extended even beyond the Society of Jesus. Even submission to the pope in the special Fourth Vow was at least partially grounded in the superiority of the pope's information base. As early as 1536 Ignatius wrote, "Our reason for thus placing ourselves at his [the pope's] disposal is

¹⁸John W. Padberg, ed., *The Constitutions of the Society of Jesus and Their Complementary Norms: A Complete English Translation of the Official Latin Text* (St. Louis: The Institute of Jesuit Sources, 1996), §668 (p. 324).

¹⁹See, for instance, Gregory XIV's bull *Ecclesiae Christianae*, in *Institutum Societatis Iesu*, 3 vols. (Florence, 1892), I:120. See also ARSI, Inst 94, fol. 2^{rv} and many other pieces.

²⁰Harro Höpfl, *Jesuit Political Thought: The Society of Jesus and the State, c. 1540–1630*, (Cambridge: Cambridge University Press, 2004), passim.

that we know *that he has a better knowledge of what will be profitable for the universal Church*" (my italics).²¹

None of these ideas was particularly original, for they may be found in many other reflections on administration and governance.²² Yet, in spite of the popularity of these ideas, we need to appreciate that such a concept of government, obvious as it might be to us, in sixteenth-

Basing governance on a locally stable center of power and on a constant stream of written reports conveying information that was not gathered personally by the decision makers must thus be seen as a conscious decision which was far from self-evident at the time.

century Europe broke with several established traditions. Bureaucracies developed only slowly. If we understand that process as a tendency to organize decision making into regularized routines following in a prescribed sequence and relying largely on standardized writing, then the Jesuits clearly participated in this trend. A major implication of this de-

velopment was the constant physical separation of decision makers from the local scene. More clearly than any other order before them, the Jesuits had given up the idea that the general should at least attempt to know all members and regions through personal contact.²³ Yet at the same time, the general's powers should be felt on the ground in a more thorough way than ever before. Polanco explained how this could be

²¹ Ignatius of Loyola to James de Gouveia, Rome, November 23, 1538, quoted from William J. Young, S.J., ed. and trans., *Letters of St. Ignatius of Loyola* (Chicago: Loyola University Press, 1959), 35. For more on this letter and the issue in general, see John O'Malley, *The Fourth Vow in Its Ignatian Context: A Historical Study*, in *Studies in the Spirituality of Jesuits* 15, no. 1 (Jan. 1983), 1–59, esp. p. 26.

²² A growing volume of literature discusses the origins of the "information state," e.g., Edward Higgs, *The Information State in England: The Central Collection of Information on Citizens since 1500* (Basingstoke: Palgrave Macmillan, 2004). For an excellent but much more critical account that relates this kind of knowledge to modernist ideas of power, see James C. Scott, *Seeing Like a State: How Certain Schemes to Improve the Human Condition Have Failed* (New Haven and London: Yale University Press, 1998).

²³ In fact, early generals, especially Laínez and Borja, traveled extensively, the former to Trent and France, the latter to Spain, Portugal, France, and Italy. Yet, their travels were taking place on behalf of the pope and were not undertaken in order to govern the Society. Given the fact that the superiors of many other orders did in fact travel and visit different provinces and establishments more or less often, Mariana's alternative ideas on this point (see below) were not per se totally unrealistic or without context.

possible. It was the numerous reports and letters exchanged within the order that were meant to bridge the distance between Rome and the individual Jesuits in the field.²⁴ Such an idea, however, was far from evident in early modern Europe and thus constantly needed to be emphasized and explained. Another famous Jesuit, more than a hundred years later, undertook once again to solve the conceptual riddles involved here. Father General Gianpaolo Oliva wrote thus in 1666:

The General, like the highest mover [*supremum agens*], must keep moving the huge body of our order which is extended over the whole world. And if he is unable to somehow close the gap between himself and the faraway lands he is useless to this task. [Closing the gap is necessary] because all philosophers deny that action through distance is possible [*actiones in distans dari abnuant*]. Yet, how to achieve this indispensable closeness, without having Christ's ubiquity? Infinite extension, which would provide ubiquitous presence, is an exclusively divine property. [Our only resource is] the loyal and sincere diligence of our administrators which, through the means of ink and paper, is able to connect Orient and Occident and moves both Indies closer to Rome. This [administrative] diligence covers geographical distance to the degree that it depicts our faraway brothers in real likeness and makes them better known to our administrators here as if they were present.²⁵

Although Oliva uses scholastic language to illustrate his point, his concern is administration and social organization. Once again quill, paper, and ink are the only means to overcome the handicap of physical separation. Such a trust in the powers of writing, however, was controversial. For many contemporaries, direct inspection and personal testimony were still considered more reliable and trustworthy than reports written by absent (and often unknown, therefore potentially untrustworthy) people. Travel writing, for instance, was often seen as inferior to personal eye witnessing. And also in legal contexts, the truth of written testimony did not easily replace the more traditional criteria of social standing. Basing governance on a locally stable center of power and on a constant stream of *written* reports conveying information that was not gathered personally by the decision makers must thus be seen as a

²⁴ This idea appears several times in the 1547 *Officio del Secretario*, ed. in Mario Scaduto, "Uno scritto ignaziano inedito: Il "Del officio del secretario" del 1547, in *Archivum Historicum Societatis Iesu* 29 (1960): 305–28.

²⁵ *Epistolæ præpositorum generalium ad patres* (Prague 1711), 757f. My translation softens the technical detail a bit in order to render the passage more readily comprehensible.

conscious decision which was far from self-evident at the time. The Society of Jesus openly embraced these new technologies and ideas of government, but not without major internal conflict, as we will see shortly.

Structures and Issues of Ordinary Jesuit Government

As has become obvious in the previous section, communication did play a crucial role for Jesuit governance. Perhaps the most basic feature of much of Jesuit correspondence is its overwhelmingly administrative character. Even in the correspondence of Ignatius himself, only a tiny fraction of letters were spiritual.²⁶ The correspondence of later generals as well as the hundreds of thousands of letters exchanged on the regional or even local level are more or less totally devoid of spiritual content. They are matter-of-fact discussions of money, people, and local circumstances sprinkled with an occasional piece of international news. The spiritual processes that might have stood behind the decisions conveyed by the letters were only rarely put into writing and are thus mostly unknown today. Manifestations of conscience or discernment of spirits might have taken place, yet the strictly administrative nature of the extant sources makes it hard to assess the role of these procedures. Whatever spirituality lay behind individual administrative decisions and deliberations, it was only rarely articulated in the correspondence and is as such often very hard to document. The extant sources mostly show the administrative face of the Society of Jesus.

From this it follows that the bulk of Jesuit correspondence was not personal, spontaneous, or unsolicited. If the Jesuits understood letter writing also as "ministry," they nonetheless did so mostly in a routine way that was highly regulated by administrative norms. Most of the extant letters were written to satisfy administrative protocol. The amount of energy that went into regulating correspondence is breathtaking. Norms eventually governed all kinds of exchanges in great detail and a constant stream of admonitions urged implementation.²⁷ Often, writing was hardly more than an obligation or a bureaucratic duty. Jesuits complained about the need and the volume of communication

²⁶See Dominique Bertrand, S.J., *La Politique de Saint Ignace de Loyola: L'Analyse sociale* (Paris: Cerf, 1985). On a smaller scale see also Thomas M. Lucas, *Landmarking: City, Church & Jesuit Urban Strategy* (Chicago: Loyola Press, 1997).

²⁷For an overview see Markus Friedrich, "Communication and Bureaucracy in the Early Modern Society of Jesus," in *Zeitschrift für Schweizerische Religions und Kirchengeschichte*, 101 (2007): 49–75.

that they were forced to write. Communication was labor; it was “a donkey’s job,” as the Jesuit Andreas Jodoci complained about the production of the *litteræ annuæ*.²⁸ Large parts of Jesuit communication did not originate in noble ideas about letter writing as personal exchange or bond of friendship.

Recent research has rightly pointed out the many shortcomings of Jesuit correspondence and administration.²⁹ But one needs to appreciate also that at times the system did function quite well. Huge amounts of documentation were produced and did follow the official rules often painstakingly. To a certain degree, the Jesuits were successful in forming a bureaucratic mind-set in many of their leading administrators. The general idea behind administrative legislation, namely, that decision making and government should function according to prescribed norms and work in a standardized way, became self-evident to many members of the order. Often enough, Jesuits in the field asked for more detailed rules, norms, and role-model documents. A lack of legislation was said to cause “anxiety” and “problems for the conscience.”³⁰ If this can be seen as evidence of a growing bureaucratic mentality in the provinces, the Roman Curia also contributed to this development. Acquaviva, for instance, extended the crucial practice of daily examen to government, a spiritual technology gone administrative. Each superior should meditate each day about his administrative performance.³¹ If Ignatius had thought that this practice might change the person in a spiritual way, then Acquaviva, placing himself knowingly in this Ignatian tradition, must have hoped for a change of the superior’s administrative persona.

*For many a Jesuit, incoming letters
were one of the very few occasions
to really experience the fact
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existed elsewhere.*

²⁸See Markus Friedrich, “Compiling and Circulating the *Litteræ Annuæ*: Towards a History of the Jesuit System of Communication,” in *Archivum Historicum Societatis Iesu* 77 (2008): 3–39; the quotation is found on p. 24.

²⁹The latest statement of this kind is to be found in the extremely stimulating book of Luke Clossey: *Salvation and Globalization in the Early Jesuit Mission* (Cambridge: Cambridge University Press, 2008).

³⁰So wrote the Provincial Congregation of *Rhenana Superior* in 1651; see ARSI, Congr 73, fol. 214.

³¹*Ordinationes Præpositorum Generalium Communes toti Societati* (Rome 1595), 18f.

Polanco's reference to the Protestant diaspora suggests that communication was seen also as contributing to more profound goals such as social unity.³² Not only modern historians but also early-modern Jesuits themselves recognized that unity was often very much in danger. Much more than being simply a fact, unity remained a project for the Society; it was not simply "there" but had to be constantly defended or even created. Letter writing helped to achieve this goal. Especially the communication of edifying news was supposed to incite mutual affection. While the effectiveness of the *litteræ annuæ* and similar genres in achieving this should probably not be overestimated, they did have an impact. We do know, for instance, that circular letters helped recruit missionaries. We also know that some of the edifying stories were quickly transformed into theatrical performances in order to foster Jesuit identity.³³

But there is yet another, more basic link between unity (social coherence) and correspondence. For many a Jesuit, incoming letters were one of the very few occasions to really experience the fact that the Society of Jesus existed elsewhere. There were only a limited number of ways to transform the Society's global pretension into a tangible experience in daily life. In fact, the sheer existence of bureaucratic routines acted as a significant counterforce against the strong centrifugal, localizing trends that plagued the Society from early on. Grudgingly as the Jesuits in the field might have borne it, the inescapable presence of administrative tasks was a major reminder that there was more to the Society of Jesus than just the local context. By writing and receiving administrative letters regularly from the distant Roman Curia, the associated idea of a global institution and network became less abstract. Put the other way around: each act of administrative letter writing helped to turn the Society's global outlook into a living reality and kept it from being merely a nebulous concept. Compliance with administrative protocol invested the associated institutions and pretensions with life and reality. Each act of administrative writing, no matter what it said, was an acknowledgment that the order's central institutions did and should exist. Even more than the content of communication, the pure act and the regularity of exchange helped to balance atomizing, centrifugal tendencies. Through administration, the Society's unified and universal mis-

³²Letter writing is discussed in part 8 of the *Constitutions*, which is titled "Means to Achieve Unity and Mutual Love."

³³See Adrian Hsia, ed., *Mission und Theater: Japan und China auf den Bühnen der Gesellschaft Jesu* (Regensburg: Schnell und Steiner, 2005).

sion did not have to be only imagined but could be experienced on a regular basis.

The Society as Forest or Trees

One of the more obvious contributions of the Jesuits to the traditions of religious organization was the office of Assistant.³⁴ At the First General Congregation in 1558, four assistants were appointed, one each for Germany, Italy, Spain, and Portugal. Before 1773 two more were created, one for France in 1608 and another for Poland in 1755. Attempts at adding further assistancies, especially for extra-European provinces, were made several times in the seventeenth and eighteenth centuries, but to no avail. The creation of assistancies suggests that the Jesuits immediately perceived the need for an intermediary entity between the universal (or global) dimension of the order and the regional one, as represented by the provinces. Especially the boundaries of the Italian, French, Spanish, and Portuguese Assistancies acknowledged existing political and even national identities. In sixteenth-century Europe, the Jesuits could not but accept the reality of growing nation-states and circumscribed political spheres. The coalition between political (or national) perspectives and Jesuit activity could play both ways. Missionary enterprises, for example, profited as much from strong alliances with individual kings as they were hampered by them. The Jesuits, from early on, were wary and cautious about the negative effects of a nationalization of individual enterprises. The growing nationalism among Jesuits was a constant concern for the Roman Curia. The fact that the Society of Jesus was a multinational entity is fairly obvious, and perhaps not all that remarkable for a Catholic religious order. More to the point is its ability, restricted as it was in very many cases, to forge truly multinational operations.

Geography remained a major criterion for the division of administrative labor within the Roman Curia. On the local level, things looked different. The colleges, for instance, had specialized administrative personnel responsible for spiritual affairs, for domestic discipline, for supervising the schools, and so forth. The administrative work was divided along different tasks and functions. Nothing like that occurred in

³⁴E. P. Burki, "Une institution originale de droit constitutionnel religieux: Le collège des assistants généraux de l'ordre des Jésuites," in *Revue de droit canonique* 35 (1985): 267-87.

the Roman Curia or on the provincial level.³⁵ No bureau of missions or a specialist for spiritual issues, not even a committee on schools, existed. At most, specialized teams were assembled *ad hoc* and dismissed after their mission was accomplished.³⁶ In a more institutionalized form, there was nothing but the assistants, and they were intentionally selected to bring in expertise that was first and foremost defined geographically. If we consider functional differentiation a major ingredient of large-scale organization, this unwillingness to go beyond a simple geographical structuring of work might be seen as a decisively pre-modern feature of the Society that remained unchanged at least until 1773. With growing operations, it became more and more naive to assume that six people (the general plus five assistants) together with the secretary and an occasional senior Jesuit could adequately cover the whole range of issues from spirituality, ecclesiastical politics, missions, and education, to internal affairs. Yet, until 1773 the Jesuit Roman Curia remained a body of "jacks of all trades," generalists who made decisions in all areas, yet were experts in none. The Jesuits would not have been hard pressed to find inspiration for restructuring; just a look at the Church's administration would have helped. With his reform of the Papal Curia in 1585, Pope Sixtus V installed a system of congregations, bodies of cardinals, each of which was committed rather precisely to a certain range of topics: Congregations for Missions, for Justice, for Taxes and so on. Surprisingly, no Jesuit ever so much as talked about a similar rearrangement of Jesuit government before 1773.

While the secretaries usually acted as loyal supporters of the generals, the assistants were harder to control. Their role was only vaguely defined in the Constitutions and at several times they launched bold attacks on the generals' powers.

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Geographical breakdown generally played a major role in thinking about the order. Attempts to represent the entire Society of Jesus usually did not go beyond an enumeration of individual provinces. The

³⁵The one exception being the procurator general and other procurators.

³⁶For instance, in the process of designing the *Ratio studiorum*, see, for example, V. J. Duminuco, ed., *The Jesuit Ratio Studiorum: 400th Anniversary Perspectives* (New York: Fordham University Press, 2000).

same holds true for the provinces themselves.³⁷ Perhaps the fine arts did create a distinctive language for depicting the Society of Jesus in its entirety,³⁸ but administration never achieved anything like that. As examples, one might cite the printed series of *litterae annuae* or the printed catalogues or even the central Roman Archive.³⁹ All of these were certainly meant to represent the Jesuit Order in its entirety, yet the *litterae annuae*, catalogues and even the archive function mostly as composites, simply enumerating provinces and individual establishments. The *litterae* contain local report after local report, with hardly any attempt at synthesizing a status quo for the provinces or the assistancies, not to mention for the total Society.⁴⁰ The same holds true for the catalogues. Also the volumes of congregational documents present the universal Society only through an anthology of unconnected provincial documents. Even the archive, to a large degree, falls into geographically defined units. Only very rarely, did unifying visions collected from the input of the provinces coalesce into a synthesis. Most of the time, the Society was the sum total of individual provinces that were, in turn, the sum total of their houses, nothing more. Polanco, however, had envisioned a perspective that would be more than a mere anthology of provinces. It seems unlikely, however, that such a synthesized perspective on Jesuit operations materialized very often in administrative contexts. Judging from administration and administrative documentation, we must say that the Society of Jesus was rarely more than just the sum total of its local and regional bodies.

Decision Making in Rome

The rarity of general congregations is another signature feature of the Society of Jesus. Unlike, for instance, the Cluniacs or Cistercians, daily politics was not made by such a representative body. Instead, this was what the general was for. He was invested with almost unrestrict-

³⁷Interestingly, there is no early-modern parallel to part I, section 2, II.A, §§25 f. of the *Practica quaedam* (Rome, 1997; henceforth *Pq*), p. 6, discussing the provincials' "Report on the Province."

³⁸A point suggested by Clossey, *Salvation and Globalization*, *passim*.

³⁹On Jesuit Archives now see Markus Friedrich, "Archive und Verwaltung im frühneuzeitlichen Europa: Das Beispiel der Gesellschaft Jesu," in *Zeitschrift für Historische Forschung* 35 (2008): 369–403.

⁴⁰Only for a very short but important period was the pure geographical structure abandoned for a topical reorganization at least on the provincial level. For more on this see Friedrich, "Compiling and Circulating."

ed powers in most fields of Jesuit activity. It would, however, be wrong to assume that the generals were isolated decision makers who governed single-handedly. The Roman Curia in fact was a highly complex social cosmos, and many Jesuits played a role in decision making. Often enough this was an amicable cooperation with open discussions. Equally often, however, Roman decisions were the result of strife, lobbying, and power games. While the secretaries usually acted as loyal supporters of the generals, the assistants were harder to control. Their role was only vaguely defined in the *Constitutions* and at several times they launched bold attacks on the generals' powers.⁴¹ Even when they yielded to the generals' superior authority, they had considerable influence. We know about regular consultations (*consultationes*) among the general, secretary, and the assistants in which decisions were taken collectively. Many letters and norms were drafted collectively in these meetings. This complicated issue of authorship (and authority) must thus be raised not only for Polanco and Ignatius, but even more so for all other Jesuit generals.

From the minutes of these consultations, we know not only about the quarrelling and cooperation; we also learn about the processing of the incoming correspondence. It is safe to say that the heaps of papers were actually read and decision making was really based on the incoming information. The quality and content of the letters determined the deliberations. If information was insufficient, a decision would be delayed and the local official reprimanded. At times we can also see how incoming news stirred discussions, and on rare occasions it is even possible to "hear" several Jesuits in Rome argue about what to do. Decision making was a process of hard work and often done collectively. At times the general took the initiative, but on other occasions other officials were asked to make propositions or decide a case. Unfortunately, we do not know very much about the additional correspondence that the assistants received.⁴² But from what little we know, it is clear that they were linked to their regions by independent networks and it is likely that these enabled them to bring in extra information on specific

⁴¹For an example see Burkhart Schneider, S.J., "Der Konflikt zwischen Claudius Aquaviva und Paul Hoffaeus," in *Archivum Historicum Societatis Iesu* 26/27 (1957/1958): 3-56, 279-306.

⁴²A rare example of such correspondence is now available in Bernard Joassart, "Jean-Paul Oliva, Charles de Noyelle et les Bollandistes d'après les archives bollandiennes," in *Analecta Bollandiana* 125 (2007): 139-97.

topics. The assistants clearly were also a major contact point if local Jesuits wanted to strategically place an issue in Rome. Occasionally we can see the assistants at the forefront of regional networks lobbying for a particular person or decision. Strong evidence seems to indicate that the role of the assistants grew significantly from the mid-seventeenth century onwards. Practically this meant that the Curia's geographical organization grew stronger over the decades. The eighteenth century, finally, saw complaints about such national networks taking over the Roman Curia entirely. Particularly the "German Generalate" of Francisus Retz, who was actually from Bohemia, was said to be controlled by such a German network.⁴³

Very often, Roman decisions seem to have been more the result of a muddling-through than of clearly defined strategies. The above-mentioned lack of synthesis corresponds to a lack of explicit strategic planning and proactive goal setting. Or, rather, if it occurred, it did not leave any traces, such as the internal position papers produced by other early modern administrations (*discorsi, consulta*). Given the extraordinary amount of information that reached Rome every day and given the elaborate rhetoric of Polanco, Acquaviva, and others cited above, this rareness of explicit strategic planning is actually astonishing. But governmental considerations about what to do only occasionally reached beyond the local contexts or the imminent future. There was only little medium-range planning of Jesuit activity in Rome. Criteria for decision making did not usually come from explicit development plans. The general and necessarily abstract goals, such as "helping souls," and similar expressions, were mostly applied directly to daily operations without a level of assessment that would evaluate the consequences in the longer run and for larger areas. Explicit projecting of where a region should and could be standing within the next five or ten years rarely occurred. Incoming information was not generally evaluated against a precise road map to the future.

The lack of strategic planning might thus be a tribute to the perennial and circumstantially flexible adaptability that was so important to Ignatius.

⁴³"Accurata expositio detrimentorum, quæ nunc patitur Societas nostra: Ad Patres Congregationis Generalis XVII," in Archivio Segreto Vaticano (henceforth: ASV), Fondo Gesuiti, 51. This document, obviously, is highly polemical.

The long and explicit discussions about missionary procedure may be an exception. After all, the decisions for accommodation or in favor of native languages were substantially influencing and determining Jesuit progress. Yet, while these were certainly basic decisions, they still only provided a very general framework of activity. Furthermore, they are first of all methodological principles and not blueprints for future daily operations. A grand strategy that would have explicitly determined a midterm goal and projected a way to achieve it after evaluating several options was generally not well developed in the Roman Curia—or at least it did not leave any traces in the extant documentation. Perhaps this was a consequence of the lack of specialization in the Curia. Also, Ignatius himself had always insisted that the formula of “helping souls” was generally open to every situation and should thus not be translated into a fixed agenda. The lack of strategic planning might thus be a tribute to the perennial and circumstantially flexible adaptability that was so important to Ignatius. Whatever the reason was, in retrospect Jesuit decision making in general only rarely looks like a careful step by step implementation of medium-level strategic plans.

The Role of the Provincial

A quick look at the role of the Provincial is important in order to balance the focus on centralization thus far. Central governance was strongly dependent on local and provincial cooperation. The center’s informational dominance was made possible almost exclusively by local and regional input. We have just discovered the inability to articulate a distinctive universal perspective that would have looked upon the Society from the elevated position of Rome. In many respects, Rome was hardly more than a hub for regional and local information. Polanco’s ideas notwithstanding, the Jesuits’ central government often reproduced the local and regional perspectives to a surprisingly large degree. Rome knew of this dependence and tried at least to control the local production of information as much as possible by applying standardizing media technologies like forms and questionnaires and by producing a closely knit normative framework for correspondence. Ultimately, however, Rome had no other means than *asking* for compliance with the requirements. If the provinces boycotted or manipulated letter-writing or if wars prohibited information from reaching Rome, the central Curia quickly became paralyzed and the danger of disintegration grew rapidly.

Yet it would be too simplistic to assume that Rome could only know what individual authors wanted it to know. A major feature of

Jesuit information management was a systematic production of multiple sources of information on the same topic. The general received reports not only from the provincials and from other officials like the *consultores*, but from local superiors as well. This could and did produce redundancy, but redundancy was a highly efficient means to control information. Differences in these reports were carefully acknowledged in Rome and turned into a powerful tool to direct and influence local activity. Especially crucial for the implementation of this multi-paper-trails strategy were the provincials. This office was reinvented as a major intermediary information hub. Most importantly, the provincial was to provide the general with an additional view on local affairs.

While sometimes the provincial was described as a mini-general on a regional scale, this description overlooks a key difference. While the general was stable in location, the provincial's office was explicitly designed to be itinerant. Provincials were constantly on the move and, as far as we can reconstruct, their itineraries were astonishing. Even in the tiny region of *Flandro-Belgica*, which loosely approximates modern-day Belgium, we see the provincials bouncing back and forth from house to house with often no more than a couple of days of rest. Even more dramatic was the challenge in Upper Germany, where the trek from Tyrol to Switzerland, for instance, was often more than challenging. The Province of Austria, by early modern standards, was too big to be toured every year, yet the provincials tried their best. In contrast to the general's absolute dependence on written reports, the provincial was a perpetual eyewitness.

The provincials were thus gathering information on a regional level, and this also included explicitly a commission to control and evaluate local input from other sources.

There was a danger that the pace of movement might actually isolate or disconnect the traveling provincials not only from Rome but even from their own province. More correspondence attempted to counter this danger. When the provincial bureaucracy functioned well, the provincials were not isolated but came to resemble moving centers connected to the rest of their province by a highly flexible network of letters. Even in tiny Belgium, for instance, it was often difficult enough to know where the provincial actually was and when or how to contact him. Papers had to be forwarded constantly and often enough did not reach the provincial even though he was only a few miles away. Also,

without their archives at hand, the provincials were often blind and inquiries had to be sent to provincial headquarters first before a situation could be adequately assessed.

The advantage was, however, that the provincial was very well informed by firsthand impressions. This made his letters a real alternative to the rectors' reports and perhaps the most important pillar of Rome's multi-perspective panoptism. But the provincials had different tasks, too. In other areas, they were less creators of alternative information than producers of *authoritative* reports. For the *litteræ annuæ*, the catalogues, or the *informationes ad gradum* or *ad gubernandum*, they were charged with compiling, controlling and, if necessary, correcting or amending local documents. The provincials were thus gathering information on a regional level, and this also included explicitly a commission to control and evaluate local input from other sources.

But no matter how information reached Rome, directly or indirectly, without local cooperation the general would have been operating blind. Not his powers, but the occasion to exert these powers depended largely on local support. Seen this way, the general's real potential to shape and guide the Society was therefore fragile by definition. If the system of information-management malfunctioned, his was hardly more than a huge range of powers without any clear object to act upon.

III. Critical Voices: Juan de Mariana

So far, the historical reconstruction has unveiled the origins and early developments of Jesuit administrative culture, a culture that strongly influenced much of the Jesuit Order's history ever since. By turning to Juan de Mariana and some of his fellow critics, we hope to demonstrate that the Jesuit way of government did not come about without the possibility of alternatives. Mariana's *Discurso de los grandes defectos que hay en la forma del gobierno de los Jesuitas* articulated disagreement with the general trend of Jesuit administrative development; and, while not providing direct inspiration for contemporary thought, it may still be helpful today to highlight the crucial choices that once were made regarding government. Acknowledging the perceptive voices of Mariana and others (instead of simply dismissing them as "disobedient") helps to uncover the fact that the Jesuit Order hosted a thin but articulate tradition of alternative thought for most of its early history. Once again: there is no way to connect Mariana's thought directly to

contemporary issues, yet the attempts of recent general congregations to renegotiate Jesuit governance thus acquires a longer historical pedigree than might have been expected.

Far from being an odd voice, then, Mariana must rather be seen as a prominent exponent of a lively tradition of Jesuit administrative counter discourse. As was the case in most other early-modern social bodies, the Jesuits also featured a rich tradition of critical self-reflection that should be appreciated as a controversial, yet committed and creative contribution to Jesuit administrative thought. Over the years, this discourse matured into a veritable tradition and later texts could and did cite earlier critiques frequently. Critical voices could draw on a wide variety of arguments, reaching from personalized polemics to detailed investigation of individual administrative routines to overall assessments of the order's administrative framework. From a historical point of view, the existence of such a counter discourse is hardly surprising. Rather, it seems to be the natural expression of the fact that alternative perspectives are constantly created in social organizations. In early-modern Europe, critical counter discourses were crucial components of political culture and the Jesuits were no exception.

The Man and His Ideas

Juan de Mariana is considered one of the major sixteenth-century Spanish Jesuit philosophers and historians. Today he is known especially as a political theorist, a historian of Spain, and as an early economic theorist. Born in 1535, he became a Jesuit in 1554 and quickly began an international career as teacher and professor. Way stations were the Roman College, Loreto, Sicily, and Paris. From early on he cooperated and competed with the most famous Jesuit professors, among them Francisco, later Cardinal, Toledo, Emanuel de Sá, and Juan de Maldonado.⁴⁴ Mariana was highly esteemed by Generals Lainez and Borja. The sources often mention his melancholic temper, a term often used to indicate psychological issues, depression perhaps.⁴⁵ Because of this melancholy, he was sent back to Toledo in Spain where he remained from 1574 until the end of his life in 1624.⁴⁶ In this long period of quiet he started writ-

⁴⁴Details can be found in Felix Asensio, "El profesorado de Juan de Mariana y su influjo en la vida del escritor," in *Hispania* 13 (1953): 581-639.

⁴⁵See *ibid.*, *passim*.

⁴⁶Ferraro, *Mariana*, 13f., n. 13, takes "melancholy" to be a code word for "dissidi con le gerarchie dell'ordine." His claim is much substantiated by a reference to the *Dis-*

ing his many works. Late in his life he attacked the Duke of Lerma, the Spanish King's favorite, for his ill-fated monetary politics. As a result, legal procedures against Mariana were instigated, and in 1610 he spent several months in jail.⁴⁷

Mariana was teaching and writing on the basis of a strong humanistic influence which favored a more exegetical or positive theology.⁴⁸ It was no wonder, then, that a colleague in Sicily complained that he "was no natural, moral and metaphysical philosopher and does not proceed

as one." He continued, "This good Father, in my opinion, does not know philosophy or metaphysics and thus does not know scholastic [meaning dogmatic] theology."⁴⁹ Mariana's strong interest in biblical studies and languages support this view. More generally, Harald E. Braun, in a

Mariana's reputation as a champion of the sinister doctrine, whether deservedly or not, became widespread and still figures prominently in much of twentieth-century historical research.

recent book on Mariana, has also called attention to a humanist style of argument that distinguished him from many of his great contemporaries.⁵⁰ While he certainly never opposed Scholastic theology as such, he nevertheless allowed himself some freedom from slavish adherence to Thomas Aquinas, the bedrock of Jesuit Scholastic education.⁵¹

curso, 607, where Mariana accuses the Curia of exiling people because of "melancholy."

⁴⁷An undated and anonymous letter in ARSI, Fondo Gesuitico, 700, fol. 431^r mentions that the Duke of Lerma was "disgusted" by Mariana, a sentiment that was possibly shared also by the king. The author suggests a severe punishment for Mariana. Mariana was criticizing Lerma on several occasions, including his negative assessment of favorites in his *De rege* and his assault on Lerma's monetary politics in his *De monetæ mutatione* (1609). See Gonzalo Fernandez de la Mora, "El Proceso contra el P. Mariana," in *Revista de Estudios Políticos* 79 (1993): 49–99, for more on this affair.

⁴⁸On "positive theology" in Paris, see Asensio, "Profesorado," 631 f.

⁴⁹*Ibid.*, 617, quoting Mariana's colleague García: "[N]o es filósofo natural y moral y metafísico, y como tal procede; y este buen Padre, según creo, no sabe filosofía, ni metafísica y consiguiente no sabe teología escolástica."

⁵⁰Harald E. Braun, *Juan de Mariana and Early Modern Spanish Political Thought* (Aldershot: Cambridge University Press, 2007), *passim*. See, in a much broader perspective, also Domenico Ferraro, *Tradizione e ragione in Juan de Mariana* (Milan: Franco-Angeli, 1989) esp. chap. 1, pp. 9–28.

⁵¹See his striking letter in Asensio, "Profesorado," 630 f.

His international reputation and career notwithstanding, Mariana seems to have cultivated a strong allegiance to Spain and the Spanish monarchy, a feature prominent also in his *Discurso*. Most clearly, this allegiance can be seen from his *Spanish History*, published in 1592.⁵² Besides cultivating a strong Spanish bias, Mariana was interested in historical development itself. This is also a major feature in his *Discurso*. An idea very dear to him was his understanding of ecclesiastical tradition as real history, indicating not only a simple sequence of steps but addressing in some detail the developments connecting them. To him, this seemed an important approach, especially since the famous Protestant *Magdeburg Centuries* had applied it in their attack on the Catholic Church. Explicitly, he attempted to counter this extremely important work of historiography by applying the same method yet substituting a Catholic perspective.⁵³

Most famous, perhaps, is Mariana's political theory. In 1599, he published *De rege et regis institutione libri III*, a book meant to guide the education of the Christian prince. It had been commissioned by a high-ranking Spanish official, the archbishop of Toledo, García de Loaysa, who had been tutor to the future king of Spain, Philip III. Perhaps Mariana himself had also been involved in educating him. The book became famous, or rather infamous, since it seemed to support the doctrine of tyrannicide. While not attempting to develop a legal theory of the right to resistance or tyrannicide, Mariana does describe rather pragmatically a situation where an imprudent king by illegal activities almost forces his subjects into resistance or even into killing him. Under these circumstances, Mariana suggests, this could be an acceptable and even commendable move.⁵⁴ In the first edition of his work, he even praised the assassin of Henry III, king of France, in 1589.⁵⁵ Rightly or not, Mariana therefore became known as the Catholic champion of tyrannicide. From 1610 (the year of Henry IV's assassination) on, Father General Acquaviva prohibited any statements in favor of tyrannicide. Mariana's reputa-

⁵²Juan de Mariana, *Historiæ de rebus Hispaniæ libri XXV* (Toledo, 1592).

⁵³See Asensio, "Profesorado," 632 (to Nadal, September 27, 1572): "El designio es de poner la tradición de la Iglesia por modo de historia, que fué el intento aunque con mala intención y por modo de los centuriadores." He proposes to treat the topoi *de Ecclesia*, *de Scriptura*, *de Primatu Pontificis*, *de Innocentia sanctorum*, *de Cultu imaginum*, *de Sacrificio Missæ*.

⁵⁴See Braun, *Mariana*, 85–87.

⁵⁵Höpfl, *Political Theory*, 318–21, quotation in 29n (p. 320).

tion as a champion of the sinister doctrine, whether deservedly or not, became widespread and still figures prominently in much of twentieth-century historical research.⁵⁶

While Mariana was certainly not a seasoned administrator, he nonetheless did have some experience. For a short period in his early years, he was rector of Loreto.⁵⁷ Later in his life and at a crossroad in the Society's early history (1588), he was explicitly mentioned as a valuable counselor to the designated visitor of the Spanish provinces, José de Acosta.⁵⁸ Mariana also attempted to be elected a member of the Fifth General Congregation, albeit without success.⁵⁹ In 1593, in the aftermath of this meeting, we see him entertaining already strongly critical thoughts about the Society's *Institutum*. Many of those were to surface again in his *Discurso*.⁶⁰ Even though Mariana started writing the *Discurso* only in 1605, he clearly had been cultivating a critical perspective on Jesuit government for several years. Mariana himself never intended this text for publication, and it was only after his death that anti-Jesuit circles saw it through the press (1625).⁶¹ Father General Vitelleschi was infuriated and prohibited possession of the work for all Jesuits. In fact, all copies that were in Jesuit hands should either be burnt on the spot or delivered immediately to the next superior.⁶² In dealing with this criti-

⁵⁶By many modern authorities Mariana has also been understood to be a champion of constitutionalism and popular sovereignty. Only very recently, Harald E. Braun offers a different account, see Braun, *Mariana*, passim.

⁵⁷Asensio, "Profesorado," passim.

⁵⁸See the instruction to Acosta from October 1588, ARSI Hispania ,143, fol. 291^r.

⁵⁹See Mora, *Proceso*, 60 f., on the basis of Astrain.

⁶⁰See his long letter to José de Acosta, September 4, 1593, in ARSI, Congr 20b, fol. 551^{rv}: He wanted regular general congregations and more power for provincial congregations. Congregations are not diminishing the superior's powers but increase his "strength and nerves." He was also critical of the way in which the Society provides grades to its members, another important topic of the *Discurso*.

⁶¹For more details on the early circulation and the first publication of the *Discurso*, see (on the basis of Astráin) Fernandez de la Mora, *El Proceso*, 60. Easily accessible is also the French translation that appeared in the second volume of the famous Geneva-based anti-Jesuit compilation, the *Second Tome Du Mercure Iesuite* (Geneva: Pierre Aubert, 1630), 87–194. The *Discurso* found its way into many anti-Jesuit works and anthologies. I have used the Spanish edition available in *Obras del Padre Juan de Mariana II* (Madrid, 1872; = *Obras de autores españolas desde la formacion del lenguaje hasta nuestros dias*, vol. XXXI), 596–617. The paragraphs given in the text refer to this edition.

⁶²Vitelleschi sent out a circular letter (July 25, 1626), Österreichische Nationalbibliothek cod. 11956, fol. 18^r.

cal text, the Curia mostly tried to present Mariana as unfit for analyzing government in the first place. The Roman Curia called attention to his bookish lifestyle and insinuated a certain form of intellectual isolation. While Mariana called practical experience a major condition of successful administration, the Curia suggested that he himself was lacking this crucial qualification.⁶³ Marianna, it seemed, instead of addressing “real” issues on a basis of detailed experience, had produced nothing but lies and insults against the Society of Jesus.⁶⁴ Yet, while he certainly did exaggerate in many ways, his criticism was clearly not as unfounded as Vitelleschi had suggested. Placed against our review of early Jesuit administrative history, it will become obvious that the Spaniard not only rather perceptively diagnosed and criticized many recent developments in the Society but also articulated an alternative approach.

*Just as everywhere else, also
within the Jesuit Order inferior
ranks fight against their superiors:
professed against rectors,
coadjutors against
rectors and superiors.*

The *Discurso*

What did Mariana really say in his *Discurso*? The text consists of twenty chapters plus introduction and conclusion. The argument moves from general considerations to the details of Jesuit life. The first sections are of particular importance in order to understand the underpinning of Mariana’s argument. Chapter 1 opens by discussing human fallibility. Mariana argues that mistakes and errors are simply part of human existence. As in *De rege*, he starts from a pessimistic anthropology. Religious congregations are no exception to this rule: they need “time and experience (*tiempo y experiencia*)” to correct initial shortcomings: “This is all the more the case in our laws, for (as will be shown shortly) they flowed

⁶³See an anonymous report (written shortly after the death of Mariana) in ARSI, Inst 94, fol. 2^{rv}.

⁶⁴See also Sforza Pallavicino, 1649 #6797 / footcit, p. 93, who saw clearly that Mariana intended more to improve than to criticize the Society’s *Institutum*. Yet, on p. 94 follows a remark similar to Vitelleschi’s assessment that Mariana “quidem Magistratum vel extra Societatem, vel in Societatem nullum administravit, sine quo vix intime potest & Respublica civem, & civis Rempublicam nosse.” Mariana was a virtuous man, yet that does not make him necessarily a good lawmaker (p. 95). I find Pallavicino’s assessment, while still being strongly critical, somewhat more balanced than the general tone of discussion.

more from speculation than from practical experience and this is a major source of all errors" (§6). Related to this is Mariana's diagnosis that Ignatius did not follow established organizational models but proposed a new scheme for his order (see also §§15, 18). This idea that Ignatius intentionally stepped outside the monastic tradition and experience occurs at several other points and always with a negative connotation in the *Discurso*. The newness and "speculative" character of the Jesuit *Institutum* became a major battleground.⁶⁵

Chapter II provides some general statements on governance. Mariana stresses that governance is far from being the rational enterprise that many think it is. Instead, politics is about power and compromise. Just as everywhere else, also within the Jesuit Order inferior ranks fight against their superiors: professed against rectors, coadjutors against rectors and superiors. Governance, the author insists, thus takes place in con-

Contrary to Polanco's basic conviction, Mariana did not believe that the distance between the administrative center in Rome and the local theaters could simply be bridged by writing letters.

stantly changing circumstances. Experience and prudence are needed to navigate this environment. Yet in Mariana's perspective, the strong reliance on a monarchical structure is not conducive to these virtues. In general, the Society's institutional framework is considered ill equipped to meet the

challenges. In chapter 3, he provides a long list of institutional and practical faults. One of the major defects of the *Constitutions* is the general's absolute powers. Chapter 4 presents the reader with several examples of mismanagement and ensuing revolts in Spain. Among the many episodes recited, Mariana's attack on the *Ratio studiorum* and his disapproval of unconditional Roman support for Luis de Molina's doctrine of grace stand out (§§33–36).

Starting with chapter 5, the *Discurso* turns to a more detailed investigation of Jesuit governance on all levels. First, he criticizes the treat-

⁶⁵For an alternative view, directly against Mariana, see Pallavicino, *Vindicationes*, 98: Ignatius did not depart more from older models than the other founders did at their time (non magis carpit Ignatium quam primos illos præclarissimos religiosorum ordinum duces). Pallavicino turns this into a praise for Ignatius (100): "Quocirca tanto consultius, ac modestius egisse videtur Ignatius, quanto latius ab aliorum Ordinum institutione discessit, tanquam novum conditurus, non veteres emendaturus."

ment of novices. Most of all, he attacks the creation of houses of novices, today especially associated with Father General Francisco de Borja. Mariana holds that the newcomers should not be educated in a special space but should immediately be thrown into the world as they are to encounter it later. In chapter 6 he discusses studies and the scholastics. Again, Mariana attacks the *Ratio studiorum*. Chapter 7 echoes broader critiques of the *temporal coadjutors* and their ever-growing numbers.⁶⁶ Next, in chapters 9 and 10, he discusses financial issues and Jesuit real estate. The growing involvement of the order in large-scale land holding and agriculture is seen as dangerous to virtues, but also leads to more organizational difficulties and extreme costs.

For our purposes particularly important are chapters 10 ("On the Monarchy") and 11 ("On the Problems Resulting from That Form of Government"). Applying biblical language to the generals, Mariana quotes Psalm 80:13: the "wild beast of the field doth devour it." If the monarchy is not moderated, it will ruin the order. Ignatius himself is partly to blame for the enormous powers of the general (§92). Mariana goes on to ponder the pros and cons both of monarchical and aristocratic governments. Here, he obviously follows contemporary political theory, which he knew so well. Among the major advantages of monarchies are their ability to provide peace and display power. Chief among the many virtues of aristocratic regimes is prudence. He therefore prefers a monarchy strongly balanced by features of an aristocracy. Suggestions to alter Jesuit government according to this principle are made at several points in the *Discurso*. At least to a certain degree, Mariana's suggestions were inspired by more traditional monastic ideas of governance.

Another point is even more important for our purposes. Mariana states: "Rome is far. The general doesn't know the persons and the facts, at least not in all circumstantial detail, which however is the precondition of adequate decision making. People say he governs by prejudice, which is no wonder. Governance is mostly concerned with particulars. But how can he achieve such a government of particulars without knowledge of things?" (§96, also §118). Here, Mariana not only engages the institutional structure and/or personal shortcomings of individual administrators, but he also addresses the informational dimension of Jesuit administration. Contrary to Polanco's basic conviction, Mariana did not believe that the distance between the administrative center in Rome and the local theaters could simply be bridged by writing letters.

⁶⁶E.g., ARSI, Hist Soc 137, fol. 3^r.

Mariana backed his point by stressing historical change. As the size and focus of any institution evolve over time, so should its administrative structure: "One cannot govern 10,000 men the way one governs 600" (§96). The Society, he seems to suggest, had outgrown the framework created by Ignatius. Only the very tiny group of original members could be governed adequately by direct and personal rule of one superior. Such a "domestic" type of government (as Mariana calls it, relying on Aristotelian political theory once more), however, was inadequate for larger bodies. The situation had even deteriorated further, according to Mariana, since not only the general but also regional and local superiors governed monarchically (§97). Again, we find a forceful statement of the advantages of collective decision making in terms of an increased information base.⁶⁷

Chapter 12 is entitled "Justice." Most importantly, he sees great injustice in the selection of office holders. As a potential remedy, he advocates a strict three-year tenure, such as also ordered recently by Pope Clement VIII (§109). In the following section (13), he criticizes a key component of paper-based administration, Jesuit style: the regular *informationes* that were the bedrock of all personnel-related decision making. Once again, Mariana is highly skeptical of information that is acquired only secondhand and in written form: "Experience shows that the Superior, especially if he is absent and does not know the people directly and through personal contact, [will discover that] this kind of information is not adequate unless it is certified and checked beforehand" (§114). Information provided in the *informationes* is called contradictory, fraudulent, and imaginary. Mariana declares that most secular regimes have been critical of such "denunciations" (§112).⁶⁸ Speaking about the destructive power of the *informationes*, Mariana goes on to criticize yet another crucial aspect of paper-based bureaucratic governance: archiving. He is aware that Rome stored incoming documents for future usage: Contrary to what Polanco and others might have suggested, in Mari-

⁶⁷ [E]l que sabe menos, que es uno, prevalece contra toda la comunidad, que forzosamente sabe mas" (§97).

⁶⁸This is an interesting (and not entirely correct) point, since his language seems to connect the *informationes* to the widespread early-modern political practice of soliciting anonymous denunciation; see, e.g., Paolo Preto, *Persona per hora secreta: Accusa e delazione nella Repubblica di Venezia*, in *La cultura* (Milan, 2003), 566. While the accuracy of this comparison should be questioned, the parallel is nonetheless revealing since it indicates the wide context of political culture against which Jesuit administration must be seen.

ana's view the Roman Archive is nothing but a pile of dangerous and untrue information. At one point, his criticism goes as far as to suggest that the Archive should be burned (§115).

In chapter 14, Mariana declares praise and punishment the two central pillars of governance. The idea "that the *respublica* 'is held together by reward and punishment, fear and hope'" recurs at several other points in Mariana's writings.⁶⁹ Once again, there is an anthropological underpinning to his ideas: fear and hope are the most important motives for human action. His diagnosis of the Society again reveals only deficiencies. "There is no other organization where there is less reward for virtue than here" (§120). Of course, the author knows that the Jesuits should seek nothing but God's praise. Mariana, how-

Altogether, Mariana advocates a shift of powers from the general to the provincial congregations and even asked for the installation of perpetual national or regional visitors or "commissars" that should be semi-independent from Rome.

ever, is no stranger to a realistic perspective: "Our frailty needs to be taken into account, which means we have to use nature's means, too. Grace is not opposed to nature, but is often forced to rely on nature." Thus, rewards and acknowledgment of achievements should have their place.

Chapter 15, by far the longest of the *Discurso*, and chapter 16 deal with the general and provincial congregations. For the general congregation, Mariana joins a widespread debate about whether these meetings should be held regularly. Not surprisingly, the *Discurso* argues in favor of periodic congregations. This is said to be a standard feature of both secular and ecclesiastical organizations. Once again, he brings up his favorite idea that monarchical powers must not be unrestrained, which is why congregations should be held. Again, he elaborates on the benefits of collective and open discussion for decision making (§137). General congregations are also seen as less prone to personal favors (§140) and better suited to react to problems (since they could change the *Constitutions* if necessary, §142). Concerning the provincial congregations, Mariana is also highly critical. These assemblies, according to him, are almost use-

⁶⁹See Braun, *Mariana*, 67, 91-94, with reference to *De rege*, 1:8, 1:9, and 3:4 (pp. 87-107, 292-301).

less since they have hardly any real powers. All they can do is elect the procurator for the next congregation of procurators (§150). Since the Roman Curia wants to promote its monarchical powers further, the claims brought forward by provincial congregations are mostly overlooked (§§151 f.). Altogether, Mariana advocates a shift of powers from the general to the provincial congregations and even asked for the installation of perpetual national or regional visitors or "commissars" that should be semi-independent from Rome (§§153 ff., esp. 157).

Next are two chapters that deal with Jesuit personnel, namely, with "the election of Superiors" (17) and with "profession" (18). Mariana is unhappy with how things proceed in both respects; more interesting here is his discussion of profession. In general, the complicated Jesuit system of different grades from early on had produced considerable confusion and discontent, both within and outside the Society. There were numerous pleas for alteration. Once again, Mariana calls for alteration of Ignatius's original structures. Several problems are detailed,

From a pessimistic moral perspective, all human things were prone to depravity, and the Society of Jesus was no exception to this rule. Institutions that functioned well initially could be expected to fail once human depravity had been brought to the fore by time.

most importantly that there is no fixed time schedule for profession. This constant state of waiting, from the perspective of individual candidates, causes agony and many aspirants ultimately turn away from the order (§171).

The penultimate section 19 is "on the laws" and comes back to the more general

discussion of the opening chapters. Mariana diagnoses a disturbing abundance of rules and norms, a fact that is made even worse since many rules have been changed all too often (§175). Also, many of the laws do not pass a critical assessment since they have been invented by speculation and are not the result of practical experience. The author here is clearly taking up the key distinction made earlier. Jesuit lawmaking, Mariana holds, also departs all too often from common law (§177 f.). While the point of experience related to lawmaking seems a peculiar one, a negative or skeptical approach towards positive law also colors other works by Mariana.⁷⁰

⁷⁰Braun, *Mariana*, 43–60.

Jesuit Administrative Counter Discourse

From the wealth of topics discussed in the *Discurso*, four aspects deserve particular attention in the context of this paper. While all of them were particularly forcefully expressed by Mariana, none was entirely peculiar to him. Some were, to a certain degree, even shared by his opponents.

1. All Jesuits had generally understood the Society with the tools of contemporary political philosophy. Also when Mariana and his fellow critics turned to the Society of Jesus, they approached it first of all simply as a normal social body. In many ways, the order did not differ from states or other communities. Therefore, the analytical tools of secular political theory could easily be applied also to the Society. Mariana quotes Aristotle and Homer, just as his fellow Jesuits and famous philosopher Francisco Suárez or any other author would do. His strong Augustinian stance notwithstanding, Mariana sees no contradiction between nature and grace.⁷¹ Man-made institutions and routines should and can be openly employed in a religious order. His critique of the Jesuit administration was certainly not simply anti-institutional or anti-bureaucratic per se.

2. Early-modern Jesuits generally had a fairly relaxed relationship toward the fact that their order was subject to historical change. With Mariana and the other critics, however, historical development had become a key defensive strategy to cope with the disturbing fact that Ignatius himself had favored a centralizing and monarchical approach for the Society of Jesus. Mariana almost developed a theory of organizational evolution in order to support his point. All social bodies, he assumed, undergo a process of development that resembles the growth of a human being, starting as a toddler and reaching maturity only after many years and several fundamental changes. Around 1600, he implied, the order was still very young and behaving like a child. Characteristic of this early period of social organizations, according to Mariana, is a lack of wisdom. As is the case with childish convictions of toddlers, also the order needs to rethink many of its initial ideas. In more than one way, the Society has moved beyond Ignatius and his era. Mariana thus strongly takes into account the variability of times and circumstances

⁷¹Stressed by Braun, *Mariana*, passim. On *Discurso's* pessimistic anthropology, see Ferraro, *Mariana*, 53–57.

and suggests that these changes should be reflected in the institutional developments.

While historicity, as Harald Braun has stressed, was particularly important for Mariana,⁷² he was by no means the only one using this strategy to support his claims for alterations of the original scheme. An anonymous memorandum against Acquaviva, for instance, that also reached the Roman Inquisition, stressed in a similar vein the changing context for Jesuit activities and the need to adjust governmental procedures.⁷³ Other texts talked more generally about historical changes. From a pessimistic moral perspective, all human things were prone to depravity, and the Society of Jesus was no exception to this rule. Institutions that functioned well initially could be expected to fail once human depravity had been brought to the fore by time. Such a pessimistic approach, which would not have been totally unfamiliar to Mariana, would see the call for additional institutional restrictions on the superior generals' powers as necessary means to counter the moral depravity of man.⁷⁴ This line of reasoning was one of the most promising ways to legitimize the attempts to alter the *Institutum*.

3. It is obvious that this went straight against the conceptual foundations on which Ignatius, Polanco, and Acquaviva had based Jesuit governance. Distance had of course been an important issue also for Polanco. Yet he had insisted that good governance should and could be possible also from afar by relying on correspondence. Polanco was convinced that written reports had the power to overcome the distance between the general and the Jesuits in the field. This belief, however, was strongly contradicted by Mariana and others. From their perspective, it was nothing but a naïve idea. Not only was letter writing at times inefficient in terms of speed, but the information contained in letters and reports was also intrinsically insufficient. It was tainted both by the local informants' prejudices and by the fact that it could never match the contextual fullness of direct observation. Written information could never

⁷²Braun, *Mariana*, 21 (see also *ibid.*, 29n).

⁷³Archivio della Congregazione della Fede (henceforth: ACDF) S.O. St.St. N 3 g, fol. 338^r-360^v (two copies = ARSI FG 700, fol. 194^r-213^v).

⁷⁴See, for instance, a 1668 memorandum against General Oliva in ASV Fondo Gesuiti, 45, n.p.

be an adequate substitute for local knowledge gained on the spot. With this claim, Mariana dismissed much of the Jesuit system of correspondence as simply utopian.

4. Following from the diagnosis of change and the insistence on governance on the spot were several institutional suggestions that were meant to enhance local and regional autonomy. Several means were suggested, including regularity of general congregations, a strengthening of the assistants and/or the provincial congregations, and the attempt to create a cardinal protector for the Jesuits. Also the Spanish call for a (semi)independent Spanish Commissariat, while also using different, national arguments, joined the general, antimonarchical choir. While many of these ideas were seemingly

The skeptics complained that the general's machinations circumvented most corrective means. They complained, for instance, that the General maltreated the assistants or that he manipulated the congregations.

taken from the monastic tradition, and are thus not per se innovative, they did provide an alternative institutional framework which the Society of Jesus could have adopted. Besides the only vaguely defined assistancies, however, Rome did not allow for the creation of intermediary bodies that would have granted at least a certain degree of local or regional autonomy.

Besides promoting governance on the spot, these institutional alterations were also meant to prevent the "tyranny" of Acquaviva and, potentially, other future generals. Accusing Jesuit generals of absolutism, despotism or other similar things was widespread at the time. This line of argument generally tried to balance personal accusations against Acquaviva with a more general diagnosis of the *Constitution's* institutional failure to check and balance the general's powers. Most dissenting voices agreed that the generals could use the *Constitutions* at least to a certain degree in order to bolster their authority. If no further restrictions were put into place, these powers were easy to exploit. While Acquaviva and his allies defended the existing structures and considered the whole structure of government well balanced, the skeptics complained that the general's machinations circumvented most corrective means. They complained, for instance, that the General maltreated the assistants or that he manipulated the congregations. While we should not simply trust the diagnosis of tyranny, the complaints are nonethe-

less revealing, since they do include acute observations about administrative daily life. True or not, these voices articulate a certain experience of administration and, more importantly, present an altogether alternative approach to Jesuit government. While non-Jesuit critics could easily afford anti-Jesuit overtones, Mariana and other Jesuits found themselves in a much more complex situation. They were at the same time enthusiastically pro-Jesuit and yet equally critical of contemporary Jesuit reality. This is what gives these texts their unique flavor.

IV. Administration Past and Present

Our look at Jesuit administrative history has shown just to what degree early modern Jesuit administrative culture was shaped by contemporary culture at large, and vice versa. The order participated, often enthusiastically, in broader historical developments. The Jesuits shared the global aspirations as well as the difficulties in realizing them with other early-modern organizations. Perhaps their attempts might have been more realistic since they had to govern only thousands of members not millions, as the emerging nation states did. This is not simply to say that the Jesuits were particularly efficient or successful administrators. Recent calls to “decentralize the Society” are justified and much innovative research is highlighting the failures of obedience and centralization.⁷⁵ Still the order’s bureaucratic achievements must be appreciated. While failing many times, the Jesuits, on other occasions, successfully adapted their strategies to contemporary problems. The amount of paperwork produced by the Society surpasses that of many comparable institutions and thus illustrates just how seriously administration was taken on all levels. While the Roman Curia often complained about the quality of governmental performance on the local level, equally often local superiors did work according to protocol. Thus the remaining documentation in the Roman and other archives is at times extremely homogenous, illustrating the high degree of standardization and administrative routine. All in all, the Jesuits thus help us understand what early-modern European political culture could and did reasonably aspire to do, and they also help to grasp the degree to which this aspiration was simply illusionary or presumptuous. The Jesuits are a valuable case study to evaluate early modern administrative culture at large.

⁷⁵Most recently see Clossey, *Globalization*.

The parallel question arises for GC 35: To what degree and in which ways is GC 35 influenced by twenty-first-century administrative culture in general and vice versa? This is not the place to address this issue. Two things, however, should have become clear at the end of this essay to any reader of the relevant decrees. On the one hand, we must acknowledge the enormous influence of early-modern administrative ideas on contemporary Jesuit government structures. On the other, it is equally important to note the major attempts to depart from this tradition in GC 35. Let us focus on the latter. The *Decree on Obedience*, for example, while stressing the idea that obedience should directly connect the Jesuit to Christ, does not explicitly mention Ignatius's claim that the superior should be seen as representing Christ.⁷⁶ Other departures are less subtle, as for example the attempts to professionalize government and administration. A vivid concern for training and apprenticeship is visible (D 5, 30–32), and the necessity of specialized expert committees on core issues has been recognized in the twentieth century and is endorsed also by GC 35. In addition to that, the congregation displays a strong commitment to “planning, implementation, and accountability” (D 3, 37). While the effectiveness of such attempts cannot be measured yet, the very commitment itself must be seen as an addition to earlier administrative culture.⁷⁷ In part, this reflects a growing familiarity with recent ideas of professionalized management.

In other areas it needs to be seen in the future if GC 35 will initiate significant alterations. Decree 5, 15, calls for updating the *Practica quædam*, but without clearly specifying in which direction. Even in its most recent edition (1997) the *Practica* displays an astonishing continuity to the early modern *formulæ scribendi*. Basically, the Jesuit system of administrative communication of 1997 was neither in content nor style substantially different from that of the late 1500s. The adjustments to twentieth-century technology and administrative theory are very few. For instance,

⁷⁶See Thomas H. O’Gorman, *Jesuit Obedience from Life to Law: The Development of the Ignatian Idea of Obedience in the Jesuit Constitutions, 1539–1556*, Logos, no. 6 (Manila, 1971), and the broad elaboration by Höpfl, *Political Theory*. Decree 4 mentions the idea that the superiors should represent Christ neither in their theological reflections (D 4, 9–17) nor in the section “Specific Aspects of the Practice of Obedience in the Society” (D 4, 23–29), where the idea of companionship between Jesuits and their superiors is stressed instead (D 4, 25).

⁷⁷The increasing role of the conferences reflects this growing commitment, since they are described first of all as a planning facility without being a “new level of government” (D 5, 18b).

the *Practica* contains only a surprisingly short section on “new media”: telephone, fax, or e-mail. More importantly, the *Practica* does not reflect the significant developments in management thought regarding intra-organizational communications.⁷⁸ The obsession with standardization even of the smallest minutiae continues as does the general trend to create a different form of paperwork for every possible occasion. The relevance of the casual or the informal for information management as well as recent ideas about horizontal and non-hierarchical communication are not well reflected in *Practica*. Procedures like the *informationes ad gradum* or *ad gubernandum* are reiterated without substantial alterations, even though

Ultimately, then, seen against the developments since GC 31 as well as against the backdrop of the earlier centuries, the recent Decree 5 of GC 35 seems to mark yet another cautious step towards accommodating the Society's administration to the new challenges of the twenty-first century.

their ethical value has seriously been questioned.⁷⁹ The *Practica* of 1997 is still dominated by early-modern ideas about how hierarchy, institutional structure, and intra-institutional communication should parallel each other.⁸⁰

By far the biggest concern of Decree 5 is to renegotiate the balance of authority within the order. While the twenty-first century might

have found its own peculiar solution to the problem, this essay shows that the issue itself has been plaguing the order ever since 1540. There is a basic conundrum of Jesuit governance, which is nicely expressed in D 5, 7: “As governance in the Society is always measured in an appropriate balance of union and diversity, the office of General must be exercised in a manner which respects diversity while placing it at the service of our universal mission and identity.” As Mariana’s clash with Acquaviva

⁷⁸For a popular and comprehensive guide to alternatives in organizational thought (with many references to communication), I relied on Gareth Morgan: *Images of Organization* (San Francisco: Sage, 1998, available in many editions).

⁷⁹James F. Keenan, “Are ‘Informationes’ Ethical?” in *Studies in the Spirituality of Jesuits* 29, no. 4 (September 1997): 1–32.

⁸⁰It should be added, at this point, that I am fairly skeptical concerning the possibility of adapting early-modern ideas and practices of leadership and administration simply to our times, even though Chris Lowney, in his *Heroic Leadership: Best Practices from a 450-year-old Company That Changed the World* (Chicago: Loyola, 2003), seems to suggest otherwise in his comparison of J. P. Morgan and Ignatius of Loyola.

shows, of course, the question of what exactly should be an “appropriate” balance was open to different valid answers. GC 35, while insisting on the relevance both of the Roman Curia and the provinces, emphasizes the local superiors and the “regions” or “conferences” (D 5, 17). The creation of conferences can be seen as an attempt finally to find an adequate institution that helps overcome provincial isolationism without immediate recourse to the idea of Roman universal government. Calls for a more regionalized structure of government could be heard in earlier times, yet contemporary Jesuit thought seems to be more comfortable in exploring these ideas. This is somewhat ironic, given the fact that recent innovations in technology and infrastructure would allow a degree of centralization unthinkable in the early-modern period.

But the exact fitting of the conferences into the otherwise still very traditional organizational chart is not yet determined. On the one hand, Decree 5 clearly spells out the role of the conferences vis-à-vis the provinces and local superiors. This seems to be the major area of interest at this point. On the other hand, however, the conferences’ relationship to the general and his claim to “authority . . . for universal mission” (D 5, 17) is less well addressed. Regular, even yearly meetings between the general and the presidents of the conferences are envisioned (D 5, 23), but apart from that the general is only mentioned as troubleshooter or mediator in cases of disagreement within the conferences (D 5, 20a3). Totally unaddressed in GC 35, furthermore, is the relationship between conferences and assistancies. Are conferences seen as regional entities emerging from the provinces while the assistancies are regional departments of the Society’s central government? While this somewhat un-specific demarcation of the assistants’ role is in line with administrative history, the lack of clarity here could nonetheless potentially become a source for conflicts over overlapping authorities and influence.

Ultimately, then, seen against the developments since GC 31 as well as against the backdrop of the earlier centuries, the recent Decree 5 of GC 35 seems to mark yet another cautious step towards accommodating the Society’s administration to the new challenges of the twenty-first century. While it is far from being a radical break with either the recent or the far-distant past, it does show the order’s attempt to adjust administrative structures. After a generation of testing, the conferences clearly are accepted now as emerging bodies of governance. While the provinces are not totally refashioned yet, Decree 5 moves towards a rethinking and potential curtailing of their relevance. Given the early-modern fear of openly institutionalizing regional entities, this is a rema-

kable adjustment. It remains to be seen exactly to what degree the rise of the regions will be at the expense of the provinces. While the power between the local, regional, and universal level of government is thus in flux, in other areas more traditional notions of hierarchy still prevail. Perhaps a new edition of *Practica* will be able to move to new horizons regarding intra-organizational communication as well.

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