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*Say Something Theological: The Student Journal of Loyola Marymount University Theological Studies*

## **Can a 12th Century Monk Teach Today's Non-Profit Leaders?**

Carlos Cruz-Aedo

**Abstract:** Is it possible that a 12<sup>th</sup> century monk can teach anything of relevance to today's non-profit leaders and their organizations? The monk, Bernard of Clairvaux, was an exemplary monastery leader throughout Western Europe. Bernard's successes during the 12<sup>th</sup> century could serve as a model for non-profit organizations and their leaders due to the challenges that some non-profit institutions face today. Additionally, a Bernardine model is more applicable in connection between Bernard's ideas and non-profit organizations since they each have altruistic similarities. One of the similarities is that they both have a "higher-calling" based on core values, whether for God or a greater mission for a community or particular cause. Furthermore, both monasteries and non-profit organizations are not trying to make a profit and mostly have non-paid members that work there. Although they each have non-or-low-paid workers, they still have or should have an organization structure with defined key roles and duties. Between the 12th century and today, there has been an evolution from the understanding and application of Bernard's ideas that can be leveraged to enhance today's organizations. This is shown in several of Bernard's early letters along with commentaries about him and his monastic leadership. Given my thirty-year experience in volunteering for regional and national non-profit organizations I see an opportunity to improve those institutions with applicable aspects from Bernard's many successes. Bernard's background, his monastery's core values, and monastic roles will be reviewed and will help demonstrate that Bernard's model can be applicable to many of today's religious and secular non-profit organizations. In conclusion, even though Bernard lived in the 12th century, many aspects of his flourishing monastery can be useful or should be at least considered to elevate today's non-profit leaders and their organizations. The foremost lessons-learned are from Bernard's core values and key monastic roles that helped grow the monasteries and ultimately influenced institutions around the world from the 12<sup>th</sup> century through present day. Furthermore, both religious and secular non-profit groups today can leverage Bernard's models of core values and structured roles and evaluate if there are applicable areas that could be customized to enhance their institutions. In addition to these Bernardine areas, today's non-profit leaders could benefit by further exploring Bernard's other approaches of leading complex global organizations. The other aspects that can be considered are in his monastic models of finance, recruiting, and community relations since Bernard used them also to grow his monasteries. Nevertheless, after a careful understanding of Bernard's monastic models around core values and structured roles, I have found that their application would clearly help several regional and national non-profit groups. The goal would be to help strengthen those organizations by creating new opportunities so that the groups continue to prosper much like Bernard and his monasteries did in the 12th century.

**Keywords:** Monk Leadership, Non-Profit Leadership, Charitable Organization, Monastery Lessons for Today's Non-Profit Leaders, 12<sup>th</sup> Century Leadership Applicable Today.

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Is it possible that a 12<sup>th</sup> century monk can teach anything of relevance to today's non-profit leaders and their organizations? Given my thirty-year experience in volunteering for regional and national non-profit organizations I see an opportunity to improve those type of institutions with applicable aspects from one monk's many successes. The monk, Bernard of Clairvaux, was an exemplary monastery leader throughout Western Europe. Bernard's successes during the 12<sup>th</sup> century could serve as a model for today non-profit organizations and their leaders due to the challenges that some non-profit institutions face. Additionally, a model is more applicable in connection between Bernard's ideas and non-profit entities since they each have altruistic similarities. One of the similarities is that they both have a "higher-calling" based on core values, whether for God or a greater mission for a community or particular cause. Furthermore, both monasteries and non-profit organizations are not trying to make a profit and mostly have non-paid members that complete the activities for their respective groups. Although they each have non-or-low-paid workers, they still have or should have an organization structure with defined key roles and duties. Between the 12th century and today, there has been an evolution from the understanding and application of Bernard's ideas that can be considered to enhance today's organizations. Too often, I have seen some non-profit board members and other volunteers debate tactical issues instead of more strategic impactful issues. Bernard's background, his monastery's core values, and monastic roles will be reviewed and will help demonstrate that Bernard's model can be applicable to many of today's religious and secular non-profit organizations. If modern non-profits were approaching it Bernard's way, then they would further improve by keeping at the forefront their own mission, specific goals, and status of the progress.

Bernard (1090-1153) was from a prominent family and his positioning within his family in part drove him to a religious life. He was born in the Fontaine region (presently known as Burgundy) and into a noble family, where notably, his father was a knight.<sup>1</sup> Bernard was twenty-three years old when he entered the Cîteaux monastery, considered the first Cistercian monastery.<sup>2</sup> Bernard was later chosen to lead a new foundation at Clairvaux monastery in Champagne and he held the abbot position at this monastery until his death.<sup>3</sup>

This monastery was referred to as the Cistercian Order and their leadership felt that they were too lax<sup>4</sup> and needed new core values. They wanted to reform monk's daily lives by strictly following what

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1 Jean Leclercq, "Introduction," in *Bernard of Clairvaux Selected Works*, trans. G.R. Evans (New York, NY: Paulist Press, 1987), 15.

2 *Ibid.*, 16.

3 Christopher Holdsworth, "Bernard of Clairvaux: His First and Greatest Miracle Was Himself," in *The Cambridge Companion to the Cistercian Order*, ed. Mette Birkedal Bruun (Cambridge, UK: Cambridge University Press, 2013), 174.

4 James France, "The Cistercian Community," in *The Cambridge Companion to the Cistercian Order*, ed. Mette Birkedal Bruun (Cambridge, UK: Cambridge University Press, 2013), 80.

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was called the old Benedictine monastic Rule of Benedict (“the Rule”). The Rules’ core values were a kind of “love” to Bernard in his monastic world. The three values or vows were a pledge to face a new direction, obedience, and stability.<sup>5</sup> These values were helpful to run and grow Bernard’s monasteries because they provided a guidance for all levels of daily living that was aligned toward their overall mission of getting closer to our loving God. It is a paradox that the Rule was “praised for its flexibility and moderation, yet within it every aspect of the daily lives of the monks is carefully ordered.”<sup>6</sup> Therefore, it is a paradox since the Rule was rigid about what to do and not do in monks’ lives, yet broad enough to allow for adjustments that could be needed in the monasteries. Based largely on the Rule, Bernard and the Cistercian approach “drew men from many parts of the Latin West into this new monastery.”<sup>7</sup> This approach, based on solid core values that directly guided the monks’ lives, was very appealing to many. Furthermore, Bernard’s monastery that started from humble and simple beginnings of one house with only a scarcity of monks, later grew to 340 related houses with hundreds or more monks and lay members in over seven countries.<sup>8</sup> These successes help solidify the point that Bernard was clearly an exemplary and influential leader that ran complex institutions.

Even in modern life, Bernard fans have noted that Bernard’s monastic teachings are important today because there continue to be challenges both for individuals and groups, which directly affect non-profits. Some of the greatest challenges facing the Americans in the 21st century are having sufficient jobs and education, economic and racial inequality, health access, and climate change and energy needs. The individual challenges impact non-profit groups as well including attracting and retaining continued volunteers, donations, and deciding on tactical and strategic options. To address obstacles, Pope Pious XII’s referenced Bernard’s values that “a new and heavenly strength [that] can flow both into individual and on into social life, to give moral guidance, bring it into line with Christian precepts, and thus be able to provide timely remedies for the many grave ills which afflict mankind.”<sup>9</sup> Pope Pious XII felt that Bernard’s heavenly-based values would help today’s individuals as well as organizations in our society. Furthermore, the same Bernard-advocate said that “men are in need of this divine love. Family life needs it, mankind needs it.”<sup>10</sup> And I add that many non-profits also need this type of “moral guidance” with love at the core. Related to my experience, I have seen some non-profit board members and other

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55 Ibid., 84.

6 Amy Hollywood, “Song, Experience, and the Book in Benedictine Monasticism,” in *The Cambridge Companion to Christian Mysticism*, ed. Amy Hollywood and Patricia Z. Beckman (Cambridge, UK: Cambridge University Press, 2012), 59.

7 Holdsworth, “Bernard of Clairvaux: His First and Greatest Miracle Was Himself,” 175.

8 Ibid.

9 Thomas Merton, *The Last of the Fathers: Saint Bernard of Clairvaux and the Encyclical Letter*, Doctor Mellifluus (San Diego, CA: Harcourt Brace Jovanovich, 1982), 5.

10 Ibid., 5.



volunteers debate some tactical issues emphatically and a more monastic approach would greatly assist. Moreover, these issues could be more easily and fairly resolved if they had Bernard's exemplary focus on solutions. Furthermore, the resolutions should be those that best align toward their own mission driven by their core values. Sometimes, those non-profit organizations have their own clear values yet did not keep them at the forefront of trying to resolve their issues. Custom and specific stated values, like Bernard had for his monasteries, can help provide today's organizations with a solid foundation to guide daily and strategic activities.

Within Bernard's values was an emphasis on not being materialistic and working hard in order to stay focused on the overall mission, which is another important lesson for today's non-profit groups. Bernard would have said that "the human who is ignorant with regard to his/her ultimate goal is estranged from his/her inmost being."<sup>11</sup> Therefore, humans that work or volunteer with non-profits should do most activities and communications driven directly to efforts that contribute toward their overall mission, which is their ultimate goal. If modern non-profits were approaching it Bernard's way, every non-profit board meeting would start with a reminder of the mission, specific goals, and status of the progress so that the staff, board, and volunteers stay focused. The meetings should therefore not emphasize with areas that could be considered materialistic such as spending too much effort and discussion on the number of new donations, number of new financial and physical assets, and other tasks that do not drive them toward the ultimate mission.

Regarding Bernard's hard-work approach, his monasteries did this primarily for two reasons: to be as self-sufficient as possible for their basic human needs (i.e., food, books, and clothes) and to fight the anxiety of possibly idleness. Different from other monasteries of their time, Bernard's monasteries rejected much of their previous tithing, rent, and church property incomes and became more internal and self-reliant. In order to make up for this loss of income, they focused on manual labor to be done within their own people, which aligned toward Benedict's view that "idleness is the enemy of the soul."<sup>12</sup> This rejection of the typical income and addition of significant internal hard work allowed them to focus more deeply on their mission of getting closer to God instead of activities that they considered ancillary to their mission. Today's non-profit organizations can benefit from this approach by gaining the ability to be more self-sustaining. Some regional and national non-profits groups that I have the honor to work with have relied too much on three or less large donation sources to operate most of their programs for the year. If these sources somehow decreased or were discontinued, some of the non-profits might cease

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<sup>11</sup> Hein Blommestijn, *The Art of Loving God: De diligendo Deo of Bernard of Clairvaux* (Point Roberts: Eremitical Press, 2009), 123.

<sup>12</sup> France, "The Cistercian Community," 81.



to exist. Therefore, some of the non-profit groups need to be more self-reliant by creating more diversified sources of income that still directly align to the non-profit's long-term goals.

The second Bernardine area that can be leveraged for today's non-profit entities is regarding Bernard's well-structured organization roles that he used to help sustain and grow his multi-national monasteries. Foundationally, Bernard established clear monastic roles that directly helped reach their organization's goals and mission. Among Bernard's monastic key roles were the abbot and cellarer (though not the monastery's only roles). The abbot is the monastic leader and "stands in and represent for Christ/God".<sup>13</sup> This role is similar to today's non-profit leader, commonly referred to as the Executive Director or CEO to represent their specific mission. Bernard's key in this role was to "teach by words and deeds/examples; *docere verbo et exemplo*".<sup>14</sup> This is a reminder for today's non-profit leaders to lead by example through their own completion of the many tactical and strategic tasks that should be aligned toward the mission. The tasks that do not directly contribute to the mission can be delegated to one of the other roles or completely eliminated. Clear aligned roles are also critical for non-profit groups since some of them have too many informal roles, therefore, either some important tasks are not completed or there are inefficiencies with too many people attempting to complete the same tasks. Yet, by applying Bernard's approach, these non-profit leaders and their organizations could become more effective with clear roles aligned toward their mission. This would result in heightened leadership and organization accomplishments, along with increased staff and volunteer morale. For some non-profit organizations, there are typically too many informal roles among staff and board members, that either some important tasks are not completed or there are inefficiencies with too many people attempting to complete the same tasks.

Although Bernard established several leadership roles under his abbot role, the "cellarer" role was especially crucial to help run complex organizations. However, many of today's non-profit groups lack this type of role. For Bernard, this role "was responsible for the economy of the monastery and its estates and granges. The material well-being of the community, upon which its spiritual health rested, depended on his stewardship. He was therefore to be 'prudent, of mature character, temperate, not a great eater, not proud, not headstrong, not rough-spoken, not lazy, not wasteful, but a God-fearing man who may be like a father to the whole community.'"<sup>15</sup> This role was therefore complicated requiring an individual capable of multi-tasking pertinent responsibilities for the monastery and necessitated a humble type of person. The person filling this role needed to handle financial details along with

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<sup>13</sup> Ibid., 77.

<sup>14</sup> Ibid, 78.

<sup>15</sup> Ibid.



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enhancing community morale of a large monastery, therefore the individual must have been an exemplary leader in their own right. This leadership role is often lacking and creating such a role should be considered. This is especially relevant for today's non-profit entities that are very large (over 200 staff/volunteers), are complex regarding the type of issues to be handled or have staff/volunteers dispersed in multiple locations. This "cellarer" role that Bernard instituted would provide these types of non-profit organizations with additional support of handling the core activities with the finances and staff/volunteer communities, so that the leader can focus on the other strategic mission-driven tasks. In addition, this "cellarer" related role will provide a better transition if the CEO leaves the company for any reason by having the qualified and experienced "cellarer" type role take over the CEO position. This would help by keeping the organization's momentum in order to continue with achieving their mission, instead of having to conduct a time-consuming national external executive search for a new CEO.

In addition to these Bernardine areas, today's non-profit leaders could benefit by further exploring Bernard's other approaches of leading complex global organizations. After gaining a careful understanding of Bernard's monastic models around core values and structured roles, I have found that their application would clearly help several regional and national non-profit groups. The goal would be to help strengthen those organizations by creating new opportunities so that the groups continue to prosper much like Bernard and his monasteries did in the 12<sup>th</sup> century.

In conclusion, even though Bernard lived in the 12<sup>th</sup> century, many aspects of his model for flourishing monasteries can be useful or should be at least considered to elevate today's non-profit leaders and their organizations. The foremost lessons-learned are from Bernard's core values and key monastic roles that helped grow the monasteries and ultimately influenced institutions around the world from the 12<sup>th</sup> century through present day. Furthermore, both religious and secular non-profit groups today can leverage Bernard's models of core values and structured roles and evaluate if there are applicable areas that could be customized to enhance their institutions. If modern non-profits were approaching it Bernard's way, every non-profit board meeting and decision-making processes would start with a reminder of the mission, specific goals, and status of the progress so that the staff, board, and volunteers stay focused and become even more successful.

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