Reckoning with History

Confederate Monuments in American Cities

Educator Guide

CHRISTOPHER ROBICHAUD, KIMBERLYN LEARY, JORRIT DE JONG, AND GAYLEN MOORE

Overview

This Educator Guide is designed to assist instructors in teaching this case to students and practitioners. It is based on case pedagogy, which invites participants to put themselves in the shoes of the protagonist(s) of the case and imagine how they would respond to the circumstances. Participants should read the teaching case in advance and identify key issues as a preliminary step toward meeting the learning objectives. Instructors may then use the time in the classroom to guide participants in exploring the issues and examining the challenges in the case; to introduce key concepts, tools, and frameworks; and to assist participants in applying their learning to their own environments and challenges. (See Appendix 1.)

This guide includes learning objectives, a synopsis, key questions, a roadmap for discussion, and appendices with additional pedagogical information and theoretical applications. The roadmap and appendices are offered to initiate meaningful conversation but are by no means the only way to teach the case. Each educator or facilitator should feel free to design their own teaching plans; both the structure and the time allotted for each component are suggestions.

Learning Objectives

The aims of this case are to help students and practitioners:

- Recognize the need for public leaders to grapple with moral dilemmas from a
  - Personal perspective (personal values and identity);
  - Professional perspective (role obligations and opportunities); and
  - Political perspective (community norms and stakeholder interests).

- Use a conceptual framework to explore the tensions among these perspectives and guide moral reasoning and decision making for public leaders.

- Deepen their understanding of key concepts in
  - Moral philosophy (deontological vs. consequentialist orientations);
  - Public administration (discretionary authority and role obligations, permissions, and prohibitions); and/or
  - Leadership theory (adaptive leadership and leading change).

- Reflect on their own reasoning and decision-making with regard to prior, current, or anticipated moral dilemmas and leadership challenges.
Case Synopsis

When nine worshipers were murdered during bible study at the Emanuel African Methodist Episcopal church in Charleston, South Carolina, in 2015, a widely circulated photograph showed Dylann Roof, the white supremacist who carried out the attack, posing proudly with a Confederate flag. Many Americans called for the removal of Confederate symbols and monuments in public places. As mayors and city governments took steps to remove, modify, or relocate these relics, factions mobilized to defend them as essential markers of American history and Southern heritage. In August 2017, white supremacists and their sympathizers gathered in Charlottesville, Virginia, to protest the removal of its Confederate monuments, marching through the streets chanting racist and anti-Semitic slogans. Clashes with counter-protesters turned violent, then deadly, when a neo-Nazi drove his car into a crowd of people, killing counter-protester Heather Heyer. With white supremacists threatening to descend on other cities, mayors scrambled to respond.

This case study follows the stories of mayors in three cities—Baltimore, Maryland; Lexington, Kentucky; and Charleston, South Carolina—as they worked to acknowledge and address the legacy of violence and injustice that Confederate monuments in their public parks and plazas represented in the aftermath of the hate crimes in Charleston and Charlottesville. They faced varying degrees of public pressure from opposing factions and different practical and legal considerations as they grappled with the moral implications of maintaining or removing these objects.

The case is designed to help mayors, city leaders, other public executives, and students of public leadership and public policy think through moral leadership challenges and questions about the bases and boundaries of authority, discretion, and legitimate action on combustible topics with highly sensitive moral dimensions.

Key Questions

1. What constraints did Tecklenburg face when deciding what to do with the Calhoun statue?
2. What would be the advantages and disadvantages of Tecklenburg’s idea to use Calhoun’s own language on the plaque?
3. What factors did he consider as he moved to address Calhoun and other Confederate symbols and sites in Charleston?
4. What alternatives could Tecklenburg have considered and what do you think the consequences of those alternatives would be?

Pre-Discussion Resources

To prepare for discussions of this case, consider using and adapting advice on talking about race and other sensitive topics in the classroom from the resources below:

- “Let’s Talk: Discussing Race, Racism, and Difficult Topics with Students” by the Teaching Tolerance initiative of the Southern Poverty Law Center
- “Guidelines for Discussing Difficult or High-Stakes Topics” from the University of Michigan’s Center for Research on Learning and Teaching
Roadmap for Discussion

| Introduction (5 minutes): Briefly state the goal of the session in reference to the case, cite specific major conflicts facing the protagonist, and foreshadow broader learning objectives. |
| Exploration (30-35 minutes): Use class discussion, “buzz groups,” and board work to examine the issues and options confronting the protagonists. |
| Diagnosis (30-40 minutes): Introduce key concepts, frameworks, and tools to help participants pinpoint possible solutions to major conflicts in the case. |
| Application (10-15 minutes, optional): Ask participants to relate the concepts and frameworks to their own organizations’ challenges. |
| Wrap-Up and Takeaways (5-10 minutes): Review the learning objectives and discuss insights most relevant to the participants’ organizations’ challenges. |

Introduction (5 minutes)
In your introductory remarks, briefly describe the case and frame the primary subject of the session: How should public leaders understand and respond to complex moral leadership challenges?

Exploration (30-35 minutes)
Consider the problem Mayor Tecklenburg faced and the different ways he could have responded based on his past actions, perceived constraints within public opinion and the law, and the ways other mayors responded to similar problems. Ask participants to provide their initial answers to the questions below in small groups or as a class.

- What constraints did Tecklenburg face when deciding what to do with the Calhoun monument?
- Was Tecklenburg’s idea to propose using Calhoun’s own language on the plaque a good one? Why or why not?

(For possible arguments for or against Tecklenburg’s plan, see Appendix 2, Board 1.)

- Are there alternatives Tecklenburg could have explored, given the challenges he faced?
  Tecklenburg’s considerations:
  - State law
  - Size and visual impact of Calhoun monument
  - Trauma after AME church massacre
  - Ubiquity of Confederate history throughout the city
  - Charleston’s role in import and trade of enslaved people
  - Etc.
Possible action alternatives:
- Revising language on plaque
- Relocating Calhoun monument
- Advocating at state level
- Adding monuments to civil rights leaders
- Etc.

Consider the three mayors in the case and compare and contrast the decision-making processes of each.

- Why do you think Mayor Pugh made the choice to remove the statues in Baltimore “quickly and quietly”? Was that the right decision for her city? Why or why not?
  
Pugh’s considerations:
  - Racial tensions and unrest following the brutalization and death of Freddie Gray
  - Baltimore demographics
  - Legal questions
  - What to do with statues after removal
  - Etc.

(For possible arguments in favor or against Pugh’s decision, see Appendix 2, Board 2.)

- Why do you think Mayor Gray chose to relocate the statues in Lexington? Was that the right decision for his city? Why or why not?
  
  Gray’s considerations:
  - Take Back Cheapside advocacy
  - Recommendations of Urban County Arts Board
  - Community preferences (contextualizing vs. relocating vs. destroying)
  - Problematic site
  - Courthouse renovations and federal tax exemptions
  - Military Heritage Commission’s jurisdiction
  - Threats from white nationalists
  - Etc.

(For possible arguments in favor or against Gray’s decision, see Appendix 2, Board 3.)

- What were some of the larger issues linked to the statues, and how did these mayors’ actions address (or fail to address) those issues?

**Diagnosis** (30-40 minutes)

When we first encounter a case with moral dimensions, we tend to jump immediately to verdicts: so-and-so did this right, this wrong, is blameworthy or praiseworthy for this or that reason, etc. The framework outlined here, however, is meant to provide the foundation for deliberative and thoughtful moral decision making on the part of public executives.
• **What are the characteristics of a moral dilemma for a public leader?**
  o Different perspectives that the public leader must take may conflict with one another, for example:
    - **Personal** values and identity against the obligations and opportunities associated with their **professional** role
    - **Personal** values and identity against the **political** realities—community and stakeholder expectations and interests—in a particular context
    - **Professional** role obligations and opportunities against **political** realities

The framework is not prescriptive; it does not offer an assessment of which of these conflicting realms of moral duty should “win out” as a public leader weighs heavy choices. It is instead a diagnostic tool for understanding moral decision-making and moral leadership as a function of these three interrelated bases of discernment. These nested, intertwined, and sometimes conflicting bases affect the perceived morality and political legitimacy of public leaders’ choices.

In teaching this case, instructors may—depending on time, curriculum, and audience—choose to focus the conversation on any or all of these realms of moral meaning making and make use of any of the background theoretical materials mentioned in Appendices 3, 4, and 5.

**Personal Perspective: One’s Own Values and Identity**

Moral agency is generally defined simply as the ability to tell right from wrong and to act within the context of that understanding. But public leaders act as moral agents within a complex “value environment” in which different actors and stakeholders prioritize among the various (moral) values at stake in different ways, at different moments, for different reasons.

Our personal morality is our own sense of right and wrong stemming from our capacity for empathy, our families of origin and relationships with others, our faith or belief systems, and our personal values. These ideas are not static but evolve over time as we learn about and interact with the world and the people in our lives, and they shape the ways that we self-identify and identify, understand, and engage with others.

Questions:

• *What personally held values played a part in the mayors’ decision-making process? How were those values evident in their public actions or comments?*

• *How did the question of what to do about the monuments challenge their personal morality?*

• *Over the course of the case, did you see shifts in any of the mayors’ expressions of their personal morality?*

• *Did any of the mayors risk violating their personal morality in the choices they made or contemplated?*

(For basic frameworks for a philosophical understanding of moral decision-making, see Appendix 3.)
Public leaders have to make tough choices fraught with moral consequences all the time, whether the public is actively watching and weighing in with passionately held beliefs or not. Whatever their personal values around a given issue, leaders are expected to use their platforms to balance conflicting values and interests to produce a “satisfactory solution” that confers political legitimacy on their choice. Ideally, that solution addresses the issue’s deeper value conflicts in both procedural and substantive terms.

**Professional Perspective: Role Obligations and Opportunities**

Public leaders occupy roles that are circumscribed by formal rules and responsibilities that constrain action as a matter of law or policy. They also enjoy certain privileges (e.g., the bully pulpit) that provide them a platform from which to survey and explore leadership possibilities. In any given profession, we work within the constraints of a limited number of explicit obligations and prohibitions on our actions and behaviors. We also use our own judgment (discretion) to understand what our platforms offer us in terms of opportunities and choices. In making moral judgments and evaluating actions, public leaders must consider:

1) whether their choices and actions align with the rules they must follow to maintain legitimacy; and

2) whether their choices and actions make the best use of the privileges and leadership possibilities available to them.

**Questions:**

- *What were the expectations associated with the mayors’ roles? Were these primarily limitations or opportunities?*
- *Were there possibilities associated with their roles that the mayors overlooked in their actions?*
- *Did any of them challenge expectations associated with their roles? If yes, how? If not, could they have? What strategies could they have employed to do so?*

When public leaders exercise discretion in how they use their authority or challenge the authority of state or federal actors, they have a range of options.

(For a theoretical discussion of discretionary authority and authority relationships, see Appendix 4.)

Review the action alternatives for Tecklenburg on Board 4.

- *How could Tecklenburg have reframed his authority to work with others (including those with informal authority in the community) in order for these choices to acquire public legitimacy?*
- *How and with whom could Tecklenburg have spoken, consulted, and acted to reach a “satisfactory solution” that aligned with his own moral views (including his moral views about his professional duty to act on behalf of the public)?*

**Political Perspective: Community and Stakeholder Norms and Interests**

Understanding the relevant social and cultural norms within one’s community—and the communities’ expectations of their elected leaders—is critical to making decisions around morally fraught issues.
Many of the judgments public leaders make about the tolerances and boundaries of “legitimate” action revolve around the values held by their constituents, the political and social culture of the community, and the institutional norms associated with their offices.

In any community, however, even those where one set of values and norms clearly dominates, there are always countercurrents and constituencies embracing other values and behavioral norms, and public leaders have wide discretion to challenge prevailing norms. There is also some room to maneuver in the ambivalence and contradictions in the values, norms, behaviors, and stated positions of individuals and groups.

Public leadership is about weighing competing values, claims, and interests against one another and working with the public to arrive at a satisfactory solution that can hold or acknowledge the various values at stake. It also involves helping those who experience policy choices as a loss come to terms with that sense of loss. This is often called “adaptive leadership.”

(For background on the adaptive leadership framework, see Appendix 5.)

Political legitimacy is grounded in the public’s belief that those who act from positions of authority are entitled to do so, and that those who are subject to that authority are required to obey.

Professor Danielle Allen of the Safra Center for Ethics asserts that in twenty-first century democracies, norms around political legitimacy have evolved to require public leaders to work to guarantee not just basic material security but also individual autonomy and dignity—and the opportunity to flourish fully—through:

- negative liberties (freedom of speech, freedom of religion, and so on);
- positive liberties (our rights to participate in collective self-government);
- social rights (that allow us to make full use of our negative and positive liberties); and
- social equality and nondiscrimination.5

Questions:
- What institutional, societal, and cultural norms or values were relevant to the mayors’ decision(s)?
- How did their choices reflect or challenge social norms and values?

![Diagram of perspectives]
Review the arguments for and against the mayors’ choices on Boards 1, 2, and 3 to identify where conflicts could have risen between the three bases of moral reasoning named above and how they affect the political legitimacy of each mayors’ choice.

- What moral goals or values were the mayors pursuing in each case? What were they trying to accomplish?
- What tactics and strategies, if any, did they use in their efforts?
- What tradeoffs were associated with the choices they made? How were they balancing competing values, expectations, and norms?

**NOTE:** Tecklenburg’s initial moral stance promoted removal of a Confederate symbol (marching to protest the flag at the statehouse with former Charleston mayor), but he ended up considering advocating for a plaque displaying Calhoun’s racism without comment. Gray’s initial stance was that adding context to the statues at Cheapside would be an adequate response, but he ultimately chose to relocate the statue after local activists persuaded him it was untenable to leave them in place. In this sense, each mayor arrived where the other started. You may want to use the personal/professional/political framework to explore why this happened.

**Application** (optional, 10-15 minutes)
Have students work together in groups or in plenary to apply the concepts and frameworks to their own moral leadership challenges.

**Wrap Up and Takeaways** (5-10 minutes)
Discuss insights most relevant to participants’ leadership challenges. Takeaways to review after a productive discussion about this case might include the following:

- Public leadership is normative work that requires a capacity for moral reasoning and moral leadership.
- Conflicts often arise among the realms of personal values, role expectations and obligations, and community social norms and values, and must be thoughtfully navigated and negotiated.
- Sometimes it is not possible or not sufficient to make the “right” moral choice, and public leaders have to exercise discretion and leadership to help their communities reach a tolerable or satisfactory resolution.

**Suggested Reading**

For students (especially those identifying as white) looking to understand what it means to be antiracist and work to dismantle racist systems, this [Google Doc](#) organized by Princeton doctoral students Anna Stamborski, Nikki Zimmerman, and Bailie Gregory links to a wide variety of resources. See also *How to be an Antiracist* by Ibram X. Kendi.6

For additional historical and contemporary context, see *Stamped from the Beginning* by Ibram X. Kendi and [data and background on the history of Confederate monuments in America from the Southern Poverty Law Center.](#)
Appendices

Appendix 1  Designing a Case Session

One Approach to Designing a Case Session

A case session aims to increase participants’ ability to use theory and frameworks to guide their thought and action in practical circumstances. To train the mental muscle and integrate theory and practice, a case session moves up and down in level of abstraction frequently, testing and refining abstract theory through practical application.

Jorrit de Jong, 2020
### Appendix 2  Board Plan

Board 1: Was Mayor Tecklenburg’s idea of quoting Calhoun directly a good one? Why or why not? (sample answers)

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>It reveals historical facts without editorializing.</td>
<td>The monument itself is the problem.</td>
</tr>
<tr>
<td>It is honest.</td>
<td>It only makes it more overtly racist.</td>
</tr>
<tr>
<td>The shock value of hearing an unvarnished view is powerful.</td>
<td>It gives voice to racist views and could be perceived as an endorsement.</td>
</tr>
<tr>
<td>It allows people make up their own minds.</td>
<td>The point will be lost on the general public.</td>
</tr>
<tr>
<td>It is legally feasible.</td>
<td>Cherry-picked quotes do not give a full picture.</td>
</tr>
<tr>
<td>Etc.</td>
<td>Etc.</td>
</tr>
</tbody>
</table>

Board 2: Did Mayor Pugh make the right decision? Why or why not? (sample answers)

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>It was a public safety issue.</td>
<td>She opened herself to legal challenges.</td>
</tr>
<tr>
<td>The monuments did not belong in a majority minority city like Baltimore.</td>
<td>It erased history.</td>
</tr>
<tr>
<td>The monuments were emblems of white supremacy.</td>
<td>It denied community opportunity to participate in the decision.</td>
</tr>
<tr>
<td>City council wanted them removed.</td>
<td>Etc.</td>
</tr>
<tr>
<td>Etc.</td>
<td></td>
</tr>
</tbody>
</table>

Board 3: Did Mayor Gray make the right decision? Why or why not? (sample answers)

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>The monuments were incompatible with site.</td>
<td>The monuments should have been destroyed.</td>
</tr>
<tr>
<td>The monuments were emblems of white supremacy.</td>
<td>He should have acted sooner.</td>
</tr>
<tr>
<td>The cemetery was a better location.</td>
<td>Monuments in a cemetery need more context.</td>
</tr>
<tr>
<td>There was a public safety issue: threats to the city and Take Back Cheapside.</td>
<td>Etc.</td>
</tr>
<tr>
<td>Etc.</td>
<td></td>
</tr>
</tbody>
</table>

Board 4: What action alternatives could Tecklenburg have considered? (sample answers)

<table>
<thead>
<tr>
<th>He could have:</th>
</tr>
</thead>
<tbody>
<tr>
<td>created a less “inflammatory” contextualizing plaque.</td>
</tr>
<tr>
<td>made an effort to relocate the monument.</td>
</tr>
<tr>
<td>installed a (taller!) monument to a civil rights figure at the same location.</td>
</tr>
<tr>
<td>continued to build on plans to add more context all around the city.</td>
</tr>
<tr>
<td>etc.</td>
</tr>
</tbody>
</table>
Appendix 3  Moral Philosophy

Broadly speaking, there are two primary philosophical frames that the public and public leaders bring to bear on questions of morality: consequentialism and deontology.

A consequentialist moral frame assumes that the morality of an action attaches only to its consequences. Maximizing net positive consequences, usually taken to mean improvements in individuals’ material welfare, is the goal. Since it is impossible to know the consequences of a choice before it is made, this frame is too retrospective to offer much guidance, but decision-makers often try to anticipate and estimate consequences in these terms before making important choices.

A deontological moral frame imposes a duty to consider not just the anticipated consequences of choices, but also ideas of individual duties (to act in alignment with personally held moral beliefs) on the part of the decision maker and individual rights (to life, liberty, and the pursuit of happiness, for example) on the part of those affected by their decisions.

Although these two frames are in disagreement as to the appropriate basis for making moral judgments, few people are “pure” in their application of ideas from one frame or another, and the public routinely holds public leaders accountable for acting in accordance with both.
Appendix 4  Discretionary Authority and Relational Authority

Legal philosopher Ronald Dworkin once compared discretion in the realm of law to the hole in the middle of a doughnut, in that it “does not exist except as an area left open by a surrounding belt of restriction.”

As pictured in the diagram below, it is common for those working in the public sector to imagine that the “belt of restriction” surrounding them is tighter than it is, adhering to “phantom rules” that may not actually exist. Often, there is more discretionary space than one might imagine.

Beyond that discretionary space there is also often opportunity to push for an expansion of what is permissible or legitimate action. Opportunities for moral leadership are often present in this space. If a person pushes too far and fast out into that space, however, they may end up a martyr rather than a leader.

Use this diagram to explore how the mayors in this case understood and used their discretion.

Dworkin Doughnut and “Phantom Rules” (Ronald Dworkin, Jorrit de Jong):
Authority relationships are fundamentally interpersonal.¹ Formal authority is conferred by selection or election. But when a community extends formal authority to a mayor, for example, the community grants that authority power and certain resources while also expecting a set of outcomes or services in return. Others in the community may hold informal authority based on trust the community places in them to represent points-of-view or because, for example, they are viewed as honest brokers. Even those with formal authority rely on their informal authority to govern.

The authority system is made up of these constituent parts but is also determined by the interaction and intersection of various interpersonal authority relationships. In many communities, people are socialized to respond to authority in particular ways.

- Relating to authority might range from submission to exit (see below). There is no single “right” or “ideal” mode of engagement. The goal is to make deliberate choices along the spectrum.
- Exercising authority, or relating from a position of authority, similarly, can range from permissiveness to coercion.

Questions:
- Where would you locate the mayors’ choices about how to both use their authority and challenge the limits of their authority on the spectrums below?
- What “middle options” did they choose?

### Modes of Engagement with Authority

<table>
<thead>
<tr>
<th>Mode</th>
<th>Submission</th>
<th>Deference</th>
<th>Respect</th>
<th>Partnership</th>
<th>Negotiation</th>
<th>Challenging</th>
<th>Questioning</th>
<th>Rebellion</th>
<th>Exit</th>
</tr>
</thead>
</table>

### Modes of Engagement as Authority

<table>
<thead>
<tr>
<th>Mode</th>
<th>Coercion</th>
<th>Punishment</th>
<th>Neglect</th>
<th>Blame</th>
<th>Curiosity</th>
<th>Compassion</th>
<th>Coaching</th>
<th>Support</th>
<th>Permissiveness</th>
</tr>
</thead>
</table>

¹ In a series of books and articles on adaptive leadership, Ronald Heifetz distinguishes authority as distinct from leadership. In a class he and Kimberlyn Leary taught at the Harvard Kennedy School, they began to further refine the interpersonal elements in authority relationships, which Leary and her research team have adapted into a forthcoming teaching note, excerpted here.
Appendix 5  Adaptive Leadership

A technical problem has existing expert knowledge about how to address it. An adaptive problem has no current, established expertise or one right answer.

Most problems have both technical and adaptive features. The government can only do so much to address complex, multicausal social problems. Sometimes the primary role of the government is to give the work back to the people, and to keep passing it back and forth to make progress. A quick technical fix can inhibit progress by cutting off an opportunity to work collectively on a problem.

When facing an adaptive challenge, an organization (or institution, community, etc.) must decide what part of the group’s past commitments (value commitments, organizational commitments, etc.) are worth preserving into the future and which are not. Leadership promotes the capacity for people to manage the tension between resisting the fundamental changes needed to succeed going forward, on the one hand, and overreacting by changing too much, on the other.

Consider Tecklenburg’s dilemma. If he were able to remove the Calhoun monument, would that have solved the problem, or was there an adaptive problem he needed to address?

- What was the scope of Tecklenburg’s authority (formal/legal vs. informal authority) to define and solve the problem?
- How did he define the problem? What were the technical aspects? What were the adaptive aspects?
- What actions made progress on solving the problem?
- Whose help did he need to make progress?
- Where did he find or build additional capacity to address the problem?

Adaptive Leadership Matrix: Distinguishing technical problems and adaptive challenges

<table>
<thead>
<tr>
<th>Kind of Challenge</th>
<th>Problem definition</th>
<th>Solution</th>
<th>Who is Doing the Work?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical</td>
<td>Clear</td>
<td>Clear</td>
<td>Authority</td>
</tr>
<tr>
<td>Technical and Adaptive</td>
<td>Clear?</td>
<td>Requires Learning</td>
<td>Authority and Stakeholders</td>
</tr>
<tr>
<td>Adaptive</td>
<td>Requires Learning</td>
<td>Requires Learning</td>
<td>Stakeholders</td>
</tr>
</tbody>
</table>
Endnotes


6 Ibram X. Kendi, How to Be an Antiracist (New York: One World, 2019).

