



Discernment in common and strategic decision-making: the integration of Jesuit provinces in Spain (2008–2014)

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Received: 31 December 2025 / Accepted: 4 July 2026
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Abstract

In a context of profound institutional, cultural, and demographic change, Jesuit institutions are challenged to renew their mission as projects of hope for the world. This paper examines the impact of *Discernment in Common* (DC) on strategic decision-making in Jesuit organizations, focusing on the integration of the Jesuit provinces in Spain (2008–2014). Drawing on a qualitative case-study design and grounded theory-informed analysis, seventeen in-depth interviews with Jesuit leaders involved in governance were coded iteratively. Findings indicate that DC functioned less as a formal method and more as a shared spiritual and organizational attitude shaping the content of strategic decisions, their execution over time, and leadership practices. To interpret these dynamics, the study engages the framework of *Circles of Apostolic Planning*, which integrates discernment, strategy, and spirituality within a continuous and iterative process. The paper offers insights for Jesuit universities and ecclesial institutions seeking responsible leadership, mission-aligned strategy, and hope-driven governance in the twenty-first century.

Keywords Discernment in common · Apostolic planning · Strategic decision-making · Responsible leadership · Ecclesial institutions · Case study

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1 Introduction

Ecclesial organizations today operate within a context of profound institutional, cultural, and demographic transformation that challenges their capacity for strategic decision-making and long-term mission sustainability (Glatz 2021). In the period following the Second Vatican Council (1962–1965) up to 2005, most major religious orders experienced a decline in membership worldwide. The Society of Jesus underwent substantial demographic contraction, with a 44% decrease during the same period (Riccardi 2022).

Between 2010 and 2020, the Spanish Jesuit Provinces faced a projected demographic decline of nearly 600 members (58%), driven by a substantial decrease in vocations and high mortality rates. In this context, General Congregation 35 called for strengthened provincial governance, encouraging greater coordination within a broader European framework.

Simultaneously, a renewed sense of collective identity emerged, emphasizing collaboration with the laity under the paradigm of “shared mission.” The development of a common Apostolic Project together with the integration of the five Spanish Provinces (Aragón, Bética, Castilla, Loyola, and Tarraconense) into a single province represented both a strategic and spiritual response to institutional contraction and evolving socio-religious realities (Mogas, 2024). A Jesuit province is an administrative unit of the Society of Jesus, led by a provincial superior, under the authority of the Superior General, whose purpose is to organize and carry out the Jesuits’ mission locally, including apostolic work, education, the promotion of faith, and the pursuit of social justice (Jesuitas España, 2018).

In Spain, this integration process was not merely administrative; rather, it constituted a strategic and spiritual endeavor aimed at renewing apostolic effectiveness, strengthening governance, and sustaining the Jesuit mission amid uncertainty and decline.

This study draws on an interdisciplinary theoretical framework that integrates spirituality, leadership, and strategic management. It engages with the literature on spiritual leadership (Fry 2003), responsible leadership (Nullens 2019; Scharmer 2016), and Ignatian spirituality as a source of personal and organizational transformation. Discernment—both individual and communal—is examined as a bridge between spiritual practice and strategic action, building on contributions that explore the integration of secular and spiritual discernment in organizational contexts (Benefiel 2008; Delbecq, 2003). These perspectives are placed in dialogue with both classic and contemporary theories of strategic management (Andrews 1997; Mintzberg, 1985; Whittington 1996).

The purpose of this research is to explore the impact of Discernment in Common (DC) on strategic decision-making within ecclesial organizations, with a particular focus on the integration of the Jesuit provinces in Spain. While prior studies suggest that DC enhances organizational cohesion, mission alignment, and inclusivity (Benefiel 2005; Fry 2003), empirical research examining its concrete influence on strategic decisions in ecclesial settings remains limited. García de Castro (2017) describes DC as a structured process in which periods of communal and personal reflection alternate to facilitate collective decision-making. This process integrates commu-

nity discussions with personal reflections, thereby enabling a more comprehensive discernment.

The study adopts a qualitative case study methodology informed by grounded theory. The integration process of the Spanish Jesuit provinces (2008–2014) serves as the empirical case. Data were collected through seventeen in-depth interviews with Jesuit leaders directly involved in governance and decision-making. The interview data were analyzed using iterative coding and constant comparison, allowing categories and themes to emerge inductively. This approach enables the capture of the lived experience of discernment, leadership, and strategy as they unfolded over time within a complex organizational transformation.

The paper contributes to the literature by proposing the Circles of Discernment, Apostolic Planning, and Way of Proceeding as an integrative and heuristic framework that emerges from empirical analysis. Rather than presenting a prescriptive model, the framework conceptualizes apostolic planning as a dynamic and iterative interaction among DC, strategic planning, and the Jesuit way of proceeding. By organizing these dimensions into concentric circles, the framework highlights their interdependence and the central role of DC in shaping both strategic decisions and execution. Conceptually, it offers insights relevant not only to ecclesial organizations but also to mission-driven institutions—particularly Jesuit universities—seeking to integrate strategy, Ignatian leadership and spirituality as a project of hope for the twenty-first century.

Against this background, the study addresses the following research question: How did DC shape the strategic decision-making processes and execution of the integration of the Spanish Jesuit provinces over time? The paper aims to contribute both empirically and conceptually to ongoing discussions on ecclesial leadership, strategic governance, and discernment-based approaches to organizational change.

2 Theoretical framework

This study is grounded in an interdisciplinary theoretical framework that brings into dialogue two interrelated bodies of literature: *DC* as a collective form of decision-making, and *strategic decision-making* as developed in the strategic management literature. Figure 1 presents the Literature Review by mapping key relationships and situating the study's analytical lenses.

As illustrated in Fig. 1, the literature on individual discernment and responsible leadership serves as the contextual background for this study. The former provides the spiritual foundation from which, and alongside which, DC emerges. The latter highlights how Ignatian discernment can serve as a valuable resource for linking self-awareness with responsible leadership (Nullens 2019).

Bringing these two bodies of literature into dialogue goes beyond simple addition; each carries assumptions that complicate the other. On the one hand, the strategic management literature offers rich accounts of decision-making under uncertainty, resource commitment, and organizational adaptation (Mintzberg & Waters 1985; Whittington et al. 2020). However, it remains neutral with respect to the spiritual or ethical foundations that guide decision-makers. By contrast, DC traditions empha-

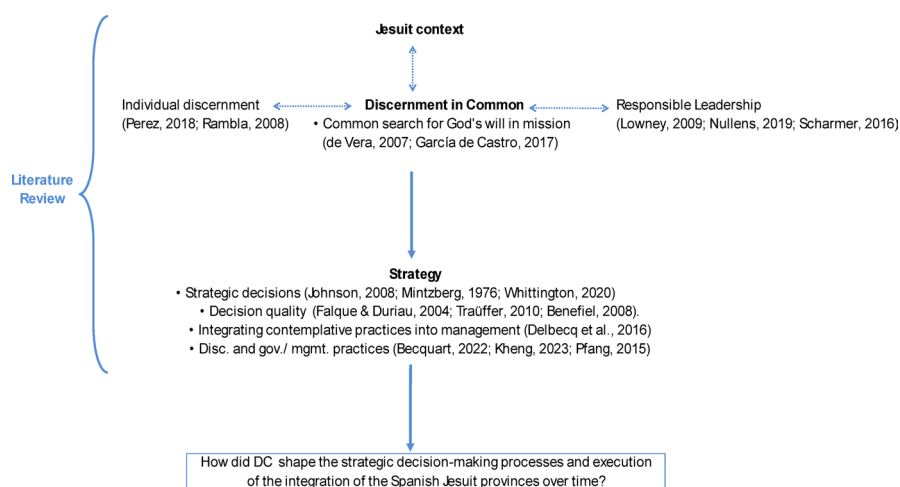


Fig. 1 Literature review

size interiority, communal reflection, and alignment with mission (Fry 2003; Benefiel 2005; Sosa 2017). However, it has generated limited empirical analysis of how such practices interact with the concrete mechanics of strategic choice—who decides, under what authority, over what time horizon, and through which governance structures. The central theoretical question motivating this study is therefore: *how does a collective spiritual practice—Discernment in Common—function as both the condition for and the content of strategic decision-making in an ecclesial organization?* Answering this question requires holding these two analytical lenses together and drawing on individual discernment and responsible leadership as contextual foundations.

2.1 Strategy and discernment: a foundational parallelism

Before reviewing each body of literature in turn, it is useful to establish the structural parallel that makes their integration plausible. As depicted in Fig. 2 ("Strategy and discernment"), the two traditions mirror one another in their sequential logic. Strategy, in its classic formulations, moves through stages of thinking, defining, deciding, and implementing (Ansoff 1965; Andrews 1997; Mintzberg & Waters 1985). Discernment, in the Ignatian tradition, unfolds through reflection, decision, experience, and action (Rambla 2008; Tetlow 2016; Pérez 2018). This surface symmetry is significant; however, the deeper connection is more important: both processes treat the relationship between reflection and action as iterative and cyclical rather than linear, and both resist reducing decision-making to a purely calculative or procedural act.

This parallelism reveals a theoretical opening. Strategic management has long acknowledged that organizations do not simply calculate optimal strategies but enact them through evolving patterns of decisions shaped by identity, values, and relationships (Mintzberg 1978; Whittington 1996). Ignatian discernment, meanwhile, integrates rational deliberation (reasons for and against) with affective and spiritual



Fig. 2 Strategy and discernment. *Source:* Andrews (1997). Ansoff (1965). Mintzberg & Waters (1985). Planellas & Muni (2019). Perez (2018). Rambla & Lozano (Eds.). (2019). Tetlow (2016)

attentiveness (consolation and desolation), recognizing that neither intellect alone nor intuition alone suffices for complex choices (de Dalmases 1990; García de Castro 2017). This convergence suggests that, in mission-driven organizations, spiritual discernment may not be an external overlay on strategy but rather constitutive of how strategic decisions are formed, enacted, and revised over time. This interpretive thesis grounds the empirical analysis that follows.

2.2 Discernment in common

Pope Francis (2013) underscores the importance of discernment in contemporary contexts, urging Christians to distinguish “what might be a fruit of the kingdom from what runs counter to God’s plan” (EG 51). Such discernment is essential for interpreting and responding to the signs of the times and involves both personal and communal reflection within decision-making processes.

This process integrates both affective aspects, such as consolation and desolation, and rational aspects, including reasons for and against, to foster holistic decision-making. Ignatius of Loyola, in his *Spiritual Exercises* (de Dalmases 1990), refers to this as the “Motions of the soul” or Discernment of Spirits. It constitutes an inner disposition grounded in an act of faith, based on the belief that God is active in life’s events and in the people we encounter and who speak to us.

DC is understood as the collective search for the will of God in relation to the community’s mission. Insights from de Vera (2007) and García de Castro (2017) highlight how DC enhances communal decision-making processes and supports mission fulfillment within ecclesial organizations. While these contributions emphasize the spiritual and communal dimensions of DC, they leave open important questions about how such practices shape concrete strategic choices, organizational priorities, and patterns of action in complex institutional settings.

From 1965 to 2016, a span of fifty-one years, DC appears in all six GCs, in the form of decrees (see Fig. 3).

GC	Decrees	Discernment in Common
GC 31 (1965)	D8: Spiritual formation : common search of the divine	fraternal meetings , which insofar as they seek the common search for the divine will
GC 32 (1975)	D11: The union of minds : corporate search for the will of God from a participated reflection	participated reflection on the signs capable of pointing to where the Spirit of Christ points. Seek at all costs the will of God over the community
GC 33 (1983)	D1: Companions of Jesus sent to the world today: CD as the way of proceeding .	If we want to fulfill our mission, we must faithfully practice the apostolic community discernment that is characteristic of our way of proceeding
GC 34 (1995)	D9: poverty	An important topic for community discernment should be our lifestyle
GC 35 (2008)	D4: obedience	discernment in the Society is a communal exercise that considers a multiplicity of voices but reaches its completion only in the conferral of a mission by the superior
GC 36 (2016)	D1: Companions in a mission of reconciliation and justice	An essential tool that can animate apostolic communal discernment is a spiritual conversation

Fig. 3 Evolution of DC in GCs of the Society of Jesus. *Source:* Own elaboration based on Garcia de Castro (2017)

The 36th General Congregation reaffirmed that DC is intrinsic to the Jesuit way of proceeding, drawing on the example of the first companions, who deliberated in common despite their cultural diversity, grounded in prayer, service to the poor, and apostolic availability.

Fr. Arturo Sosa SJ's "Letter on DC to the Whole Society of Jesus" (Sosa 2017) highlights the strategic importance of collective spiritual discernment, particularly in relation to reconciliation, apostolic priorities, interculturality, and collaborative mission.

The parallel articulation of individual and DC facilitates a dynamic interplay between community discussions and personal reflection (Garcia de Castro, 2017). Each communal stage is followed by a period of individual discernment, ensuring that each member's insights inform the collective outcome. This iterative feedback loops between communal and personal moments fosters alignment and careful consideration, enhancing the discernment process prior to its finalization.

The inner work of individual discernment cannot remain purely private. It is through shared discernment that leadership becomes responsible, oriented outward toward the communities one is called to serve (Nullens 2019). In this sense, responsible leadership entails accountability, ethical integrity, and commitment to stakeholder well-being, thereby linking inner development to outward organizational action (Lowney 2009; Nullens 2019; Scharmer 2016).

These leadership dispositions are sustained by concrete contemplative practices that have increasingly been studied in organizational and ecclesial contexts. Delbecq (2016) emphasizes the importance of integrating such practices into daily routines and managerial work, showing how approaches rooted in Ignatian spirituality and other reflective traditions, support ethical integrity and foster both personal and organizational transformation. Similarly, Benefiel (2005) and Coghlan (2005) highlight Ignatian practices as powerful resources for personal and organizational transformation. These practices involve reflective and contemplative exercises that cultivate self-awareness, deepen discernment, and support ethically grounded action.

Recent works by Kheng (2023), Pfang (2015), and Becquart (2022) demonstrate how discernment informs governance and management practices in ecclesial settings, reflecting the integration of spiritual principles into organizational decision-making processes. Kheng (2019) further examines how ecclesial discernment can enhance governance within the Catholic Church by aligning decision-making with spiritual values and ethical standards. Similarly, Pfang (2015) highlights the role of discernment in enabling church leaders to navigate complex organizational challenges, emphasizing the alignment of decisions with the broader mission and community.

What remains less developed in this literature is how these spiritual and relational dynamics interact with the structural features of strategic decisions. It is precisely here that the strategic management literature offers complementary analytical tools.

2.3 Strategic decisions and execution

Strategic management literature helps clarify the nature of strategic decisions—characterized by uncertainty, long-term consequences, and resource commitments—yet it often remains normatively neutral regarding the spiritual and ethical foundations that guide decision-making in mission-driven and ecclesial organizations.

At its core, strategy is understood as a pattern in a stream of decisions (Mintzberg 1978), encompassing both deliberate and emergent elements (Mintzberg & Waters 1985). It highlights the dynamic nature of strategy formulation and execution, acknowledging the interplay between planned actions and emergent outcomes.

The identification of an underlying structure with seemingly unstructured processes (Mintzberg 1976) provides a framework for analyzing decision-making dynamics and helps explain variations in the success or failure of strategy implementation (Miller 1997). Moreover, the study of decision-making dynamics sheds light on the factors that influence organizational adaptability and survival (Bourgeois & Eisenhardt 1987).

2.3.1 Strategic decisions

Strategic decisions comprise pivotal activities that shape an organization's future trajectory, involving the formulation of medium and long-term objectives. They exert a profound influence on the company's overall direction and configuration, typically requiring substantial resource commitments. Their inherent complexity lies in the imperative for managers to make such decisions under conditions of limited information and few clear precedents. (Johnson 2008; Mintzberg 1978).

Drawing on Whittington (2020), strategic decisions are inherently complex, requiring multifaceted consideration and analysis. They are situated within environments characterized by uncertainty, demanding the ability to navigate ambiguous conditions. While oriented toward long-term objectives, such decisions reverberate throughout the organization, shaping day-to-day operational activities and, they entail substantial commitments in terms of actions undertaken, resource allocations, and the establishment of precedents (Rumelt 1984).

Crucially, the responsibility for formulating strategic decisions rests with the managers, underscoring the central role of leadership in shaping the organization's course and requires direct managerial engagement (Mintzberg 1976; Teece 2014).

2.3.2 Execution

As organizations navigate complex environments and seek to sustain long-term performance, the implementation of strategy emerges as a critical challenge (Eisenhardt, Kathleen M. & Zbaracki, 1992). Effective strategy execution requires attention to detail and a thorough understanding of implementation requirements at each stage of global strategy (Hrebiniak 1992). Despite these challenges, the practice perspective on strategy emphasizes the role of strategists and strategizing in driving organizational excellence and success (Whittington 1996).

Bradach (1996) introduced the 7-S model, emphasizing the importance of organizational alignment in successful implementation. This framework offers a holistic view of the factors influencing execution effectiveness. Similarly, Hrebiniak (1992) explores the complexities of implementing global strategies, highlighting the challenges and key considerations for multinational corporations.

Schmelzer and Olsen (1994), as well as Kaplan and Norton (2000) contributed to the literature by introducing data-driven approaches and the balanced scorecard, respectively, to enhance the effectiveness of strategy implementation.

Across the two bodies of literature reviewed here, strategic management theory offers the most developed analytical tools for understanding how organizations navigate complexity, commit resources, and implement decisions over time. While strategy theory can describe what is decided and how decisions unfold structurally, it has comparatively little to say about the inner dispositions, communal practices, and spiritual attentiveness through which leaders in ecclesial organizations discern which direction is worth pursuing in the first place. Yet it is precisely this limitation that reveals the deeper point: in an organization such as the Society of Jesus, strategic action and spiritual discernment are not parallel processes but inseparable ones.

Despite the growing literature at the intersection of discernment and strategy, there remains limited empirical evidence on how DC shapes strategic decision-making in Jesuit organizations. Existing studies and normative texts offer limited analysis of how collective discernment operates in practice when ecclesial organizations face complex strategic choices, organizational restructuring, and long-term mission planning (Benefiel 2005; García de Castro 2017; Sosa 2017). This gap is particularly evident in research that examines decision-making as a process unfolding over time—a longitudinal dimension that this study addresses through its qualitative case study design. Against this background, the study addresses the following research question: How did DC shape the process and execution of strategic decisions in Jesuit organizations over time?

3 Methodology

3.1 Approach and case study design

We adopted a qualitative longitudinal single-case study design (Stake 1995) to examine the role of DC in the strategic decisions guiding the 2008–2014 integration of the Jesuit provinces in Spain. The integration process unfolded in three phases over more than six years. First, until 2008, the decision phase was driven by the Provincials, who converged toward integration and secured formal approval, making the process irreversible. Second, from 2008 to 2010, the focus shifted to design, including the development of the Apostolic Project, governance structures, and organizational architecture. Third, from 2010 to 2014, during the transition phase, these decisions were implemented, consolidating leadership and structures into an integrated province.

The study follows an interpretive perspective, seeking to understand how participants made sense of discernment and strategy over time within a complex ecclesial transformation. While positivist case study traditions stress structured procedures and generalization across multiple cases (Yin 2009), our study follows Stake's (1995) constructivist perspective, which values flexibility and the depth of insight attainable through a single, contextually rich case.

The research followed a two-phase case study design that enabled a progressive deepening of insight into the restructuring of the Jesuit provinces in Spain. Phase 1 (2021–2022) established the empirical foundation of the study through eight in-depth interviews with key actors involved in the integration process, a systematic review of internal Society of Jesus documents and public sources, culminating in the development of a teaching case. Phase 2 (2023–2024) expanded this base with nine additional interviews to assess DC's role in strategic decision-making more explicitly, examining how decisions were designed, made, and implemented. In total, seventeen interviews were conducted, confirming theoretical saturation (Locke 2005). The sample consisted of high-level Jesuit leaders with governance responsibilities at the provinces and province-governance levels, serving as delegates, all of whom were directly or indirectly involved in the integration process, as detailed in Table 1. Together, these two phases support a qualitative longitudinal perspective by reconstructing discernment and decision-making processes across multiple governance cycles and temporal horizons.

3.2 Data collection and analysis

The first author conducted all interviews, following a protocol that evolved as insights emerged from the field. Participants were invited to narrate their experiences in depth, beginning with broad, open-ended questions designed to elicit their roles in the integration of the Jesuit provinces, their personal experience of the process, and their detailed recollection of how decision-making unfolded. Building on these general prompts, the protocol incorporated progressively more specific questions to assess the effects of DC. These targeted questions examined whether participatory practices enhanced stakeholder buy-in (Freeman 1984), whether the values embedded in DC

Table 1 Interview participants and governance roles in the Jesuit integration. *Source:* Authors' own work

Participants	Interview date	Role	Organizational level	Governance function	Length (min)
P1	05-nov-21	Provincial region 1	National province	Provincial 1	60
P2	09-dec-21	Provincial of region 1	National province	Provincial 1	70
P3	16-dec-21	Provincial of region 1	National province	Provincial 1	75
P4	21-dec-21	Provincial of region 1	National province	Provincial 1	60
P5	10-jan-22	Provincial of region 2	Regional province	Provincial 2	90
P6	10-jan-22	Provincial of region 3	National province	Provincial 3	70
P7	11-jan-22	Provincial's assistant	Provincial governance	Member of the Provincial's Region 3 consultative council	75
P8	18-jan-22	Provincial of region 1	National province	Provincial 1	75
P9	05-oct-23	Provincial of region 1	National province	Provincial 1	60
P10	30-oct-23	Provincial of region 2	Regional province	Provincial 2	70
P11	08-nov-23	Provincial of region 3	National province	Provincial 3	70
P12	28-dec-23	Provincial of region 4	Regional province	Provincial 4	70
P13	17-apr-24	Delegate 1	Sectoral governance	Leader of Jesuit apostolates	45
P14	21-apr-24	Delegate 2	Sectoral governance	Leader of Ignatian spirituality initiatives	45
P15	26-apr-24	Provincial of region 5	National province	Provincial 5	70
P16	03-may-24	Provincial region 6	Regional Province	Provincial 6	60
P17	08-may-24	Assistant to delegate 1	Sectoral governance	Coordinator of Jesuit apostolic institutions	45

In the Society of Jesus, a “province” is the main territorial governance unit, led by a Provincial who serves as the major superior responsible for mission, personnel, and strategic decisions. At the time of the integration process, Jesuit governance in Spain was organized through five provinces: Aragón, Bética, Castilla, Loyola, and Tarraconense

aligned actions with strategic objectives, and whether DC facilitated the co-evolution of planned and emergent strategies through iterative evaluation. All interviews were conducted remotely between November 2021 and May 2024.

The dataset comprised 995 min of interview material, with individual sessions ranging from 45 to 90 min and averaging 66 min. All interviews were audio-recorded with prior ethical approval, ensuring anonymization of responses. Consistent with recommendations for qualitative inquiry, establishing a trustful and open atmosphere was essential to elicit deep reflections from participants (Finkel et al. 2009). Data analysis was conducted using NVivo (v. 14). Following Charmaz's (2006) constructivist grounded theory procedures, we used iterative and inductive coding to generate analytically grounded categories. Analysis began with initial coding through iterative readings to identify preliminary categories. Subsequent focused coding organized the data thematically, relying on the initial codes as analytical anchors. Through inductive, interview-by-interview coding, themes and sub-themes were structured as “parent” and “child” nodes, which were continually refined to ensure clarity and parsimony. This process yielded four overarching parent codes—strategic decision, execution, cross-cutting, and future challenges—that captured the core dimensions

of the data presented in Table 2. In the final stage, axial coding entailed a systematic category-by-category review to improve coherence and strengthen conceptual organization, leading to the redefinition, unpacking, or occasional merging of nodes to ensure an analytically consistent coding structure.

To strengthen validity and credibility, we employed triangulation as a central methodological safeguard (Creswell & Poth 2018; Stake 1995), systematically cross-checking evidence across qualitative interviews, archival, and documentary records to ensure consistency and guard against bias. Peer debriefing sessions allowed fellow researchers to review and challenge the coding structure and emergent interpretations, while members checked accuracy with selected participants. Expert consultation with practitioners and academics familiar with Jesuit governance and organizational restructuring provided external validation and contextual depth. Through this iterative, multi-source approach, conclusions rested on convergent evidence rather than isolated perspectives.

4 Findings

The findings presented in Table 2 are derived from the qualitative analysis of seventeen in-depth interviews with Jesuit leaders involved in the integration of the Spanish provinces. The analysis yielded four overarching themes: (1) strategic decisions, (2) execution, (3) cross-cutting issues, and (4) future challenges. These themes are illustrated through representative quotations that capture how DC was experienced and enacted throughout the integration process.

These findings are complemented by an inductive temporal bracketing analysis that identifies recurring patterns—such as the progressive consolidation of authority, the ongoing discussion around unity and diversity, and the translation of discernment into new governance structures.

4.1 Theme 1: strategic decisions

The qualitative analysis revealed that the consolidation of the five Jesuit provinces into a single province was shaped by a long and complex strategic decision-making process. Three interrelated sub-themes emerged from participants: (1) Decision, (2) Motivations, and (3) Approval. Together, these illustrate how discernment, demographic realities, mission-focused governance, and ecclesial alignment converged in participants' accounts during the integration process.

4.1.1 Decision

The strategic decision-making process began two years prior, in 2006. Twelve participants recalled that the idea of a single unified province initially appeared, “*almost impossible*” (P. 9), yet opened a new long-term horizon that energized the conversation. Several informants highlighted the role of Jesuit identity and charisma in sustaining momentum: “*Suddenly, a long-term horizon (10–15 years) appears that*

Table 2 Themes and codes generated ($n=17$). *Source:* Authors' own work

Codes	References (participants)	Representative quote
<i>Theme 1: Strategic decisions</i>		
Decision	89 (12)	"First, the decision to start the process. Model: Single province. The lookout of the process seemed impossible..." (P. 9)
Motivations	31 (8)	"There was a spiritual and apostolic foundation of the process to change the (rational) scenario of motivation. We're not dying, we're transforming. There will be points of decay but also recreation." (P. 1)
Approval	25 (9)	"With an eye on the greatest and best service to the Church and society, ..., I approve the proposal presented and pledge my support for its implementation." (Fr. General, Adolfo Nicolás SJ, 11/2008) (P. 3)
<i>Theme 2: Execution</i>		
Communication	18 (6)	"Since 2008, when the integration was announced, the three key-words are transparency, participation, and socialization." (P. 5)
Evaluation	6 (3)	"And to constantly evaluate that the organizational chart, statutes, ... that nothing is closed, treat it as a continuous process of evaluation." (P. 5)
Implementation	34 (11)	"After the approval of the creation of the new Province, two commissions were created: Apostolic project: one Jesuit from each Province, presided over by the Provincial Government of the Province: two Provincials and the Provincial of Spain. Over two years, the designs were shared with all the Jesuits, and all the comments were incorporated." (P. 6)
Infrastructure	13 (6)	"Another element that helped (the process) was the elaboration of a common Apostolic project. That defined us a lot, and not the legal structure." (P. 12)
<i>Theme 3: Cross-cutting</i>		
<i>Discernment</i>		
Individual discernment	31 (9)	"Discernment is fundamentally an attitude: listening to others; changing my position; What we are deciding is above and beyond us." (P. 11)
Discernment in common	20 (7)	"Today, when we do DC, we gather to pray. At that time, this was not so present. What was present was that when we were going to start the meeting, we had already prayed." (P. 11)
<i>Way of proceeding</i>		
<i>Cura apostolica</i>	25 (3)	"An issue that was of great difficulty at that time was to ensure that the government that emerged would care for and balance the personal cure and the apostolic cure." (P. 12)
<i>Cura personalis</i>	24 (3)	"A delegation of the elderly was considered, which cost quite a lot. It was taken over by a charismatic Jesuit, and it worked." (P. 4)
<i>Theme 4: Future challenges</i>		
Jesuit presence	3 (2)	"There is a reduction in the numbers of Jesuits and communities, however, there is almost no reduction in apostolic works." (P. 14)
Union of spirits	3 (3)	"The rational-structural aspects were accentuated out of necessity, while elements more related to personal integration, spiritual inspiration, and union of spirits and hearts were left for later." (P. 14)

Table 2 (continued)

Codes	References (participants)	Representative quote
Shared mission	5 (3)	"It is still pending how to continue the process of collaboration in the shared mission.... Furthermore, among lay collaborators, the diversity is enormous, and work remains to be done in this sense." (P. 15)
Secularization	1 (1)	"We have the challenge of how to position ourselves in a society that is so secularized and diverse in cultures, races... The emergencies eat us up and leave us no room for reflection." (P. 17)

greatly enlivens the process... It's the universal Society that gives it momentum." (P. 1).

Participants emphasized that the decision was not straightforward, as the five Spanish provinces differed significantly in size, strength, identity, and institutional capacity: "*There was a diversity of provinces, some of them very weak. The strong, however, did not see the need for integration*" (P. 6). Integration thus required not only strategic planning but the gradual construction of a shared understanding of its necessity.

General Congregation 35 (2008) reinforced movement toward a more integrated, mission-focused governance model for the Society of Jesus, making provincial consolidation appear both logical and necessary. As participant 5 noted, "*Spain preempted the GC35 decree. In 2004, the integration of Castile and Toledo took place*" (P. 5). However, the Spanish case involved specific territorial and cultural complexities, particularly how to "*harmonize the rhythms and styles of each province*" (P.5), given the diversity of territories such as Aragón, which included the Balearic Islands, Valencia, and the more marked identities of the Basque Country and Catalonia.

Respect for different mission contexts became a central concern to the discernment process, particularly regarding Catalonia and the Basque Country:

"I think that one issue that we discussed a lot was respect for the different mission contexts, that is, what were the peculiarities of Catalonia and the Basque Country, with their specificities, in terms of language and cultures. That was recognized quite naturally; it was a topic that was debated a lot." (P. 12)

Initially, these territorial differences generated concern: "*At first there was fear of the reaction of the Provinces of the Basque Country and Catalonia. However, the sense of realism gradually prevailed*" (P. 7).

Despite these tensions, participants described the importance of the table of provincials. "*The Provincial leads the Provincials to the integration question. At the table of provincials, there is debate, discernment, and finally a decision*" (P.8). The decision was not simply imposed from above but emerged through a process of discussion, recognition of differences, and progressive convergence. To revitalize, the mission remained at the core of the process, and "*what helped was the joint work of the provincials, and the consensus among them*" (P. 12).

4.1.2 Motivations

Eight participants highlighted the dual rationale, pragmatic and spiritual/apostolic, that underpinned the decision to integrate. Central was the desire for “*greater apostolic effectiveness*,” framed as a response to new challenges:

“We had to respond to new challenges with other structures and another apostolic project with a broader outlook, beyond borders, like the Universal Society (St. Ignatius). The Jesuits do not enter a province, but the Society.” (P.5)

On the pragmatic side, participants pointed to demographic decline, escalating structural demands, and sustainability concerns. Yet integration was not interpreted merely as a response to decline, but as transformation and renewal: “*We’re not dying, we’re transforming. There will be points of decay but also recreation*” (P 1).

4.1.3 Approval

Nine participants referenced the formal approval of the restructuring by Fr. General Adolfo Nicolás SJ in 2008. His endorsement emphasized the ecclesial and societal value of the initiative “*with an eye on the greatest and best service to the Church and society, and so that the Society may continue to carry out its mission with renewed impetus and fervor*” (P 3). Two years later (2010), he acknowledged the structure of the new province, balancing authority and diversity:

“On the one hand, the figure of the Provincial will guarantee the unity of government, by maintaining all the authority granted to him by our right and by trying to integrate and combine the “cura personalis” with the “cura apostolica”, without losing sight of the mission of the province and its evangelizing project....” (P. 3)

4.2 Theme 2: execution

The case then examines implementation and operationalization through four sub-themes: (1) Communication, (2) Evaluation, (3) Implementation, and (4) Infrastructure.

4.2.1 Communication

Communication was identified by six participants as critical in the period following the integration approval:

“Since 2008, when the integration was announced, the three keywords are transparency, participation, and socialization. The communication strategy is that there would be ongoing, high-quality information.” (P. 6)

This transparency involved openly recognizing provincial differences. What helped was “*the clarity among the provincials about the different contexts of each of the provinces,*” since each province had “*its history,*” “*circumstances,*” and “*social and ecclesial contexts*” (P. 10).

In moments of difficulty, communication became key for fostering alignment. Early resistance surfaced as “*symptoms that indicated weakness. There was evidence which indicated very clearly the way to follow. But it was not accepted*” (P. 2). Leaders responded by intensifying direct, personal communication, particularly bilateral encounters: “*Where has the difficulty been or... Well, let's talk. For example, one of the things I did a lot was the bilateral people-to-people dialogues*” (P. 11).

Following integration approval, “*the strategy was that there would be great information on an ongoing basis... to encourage the participation of all (Jesuits)*” (P. 14). Communication operated on two levels: upstream and downstream, “*Fr. General was very well informed: the meeting minutes were shared with him. In return, they received feedback from the General Curia*” (P. 4).

Overall, aimed at gaining alignment:

“*Alignment is the problem after the decision. How to improve communication, listen a lot, and pick up sensitivities in the background. General consultation with the whole province, which gives a lot of feedback.*” (P. 14)

4.2.2 Evaluation

Evaluation emerged as a central practice, with three participants emphasizing continuous and periodic assessment. This orientation was deliberately open-ended, with no aspect considered final: “*To constantly evaluate that the organizational chart, statutes, etc. that nothing is closed, treat it as a continuous process of evaluation.*” (P. 5).

Ongoing assessment aimed to ensure adaptability, address unforeseen challenges, and foster perpetual learning: “*We always said that there had to be an annual review to correct deviations, and that was done every year, in every sector...*” (P. 6). These regular check-ins guided action and enabled timely adjustments.

4.2.3 Implementation

The implementation phase was directed toward preparing “*the transition of the government of five to that of a single Province and enable the progressive implementation of the Apostolic Project*” (P. 3), grounded in both “*a single apostolic project*” and “*a single structure of religious and apostolic government*” (P. 3), conceived from the outset as both apostolic and organizational.

Eleven participants referenced several pivotal documents organized around vision, mission, organization, planning, and governance, including “Contemplation of the Reality to which we are sent” (July 2009), which incorporated: Revitalizing the Life and Mission of the Apostolic Body; Apostolic Project; and Governance Structure for the Transition Phase and New Province.

Implementation unfolded through clearly defined phases: “*2008–2010: Design; 2010–2014: Transition; 2014–2017: First Triennium of the New Province*” (P. 1), a

staged process through which discernment, planning, and governance were progressively translated into institutional arrangements.

4.2.4 Infrastructure

Following the approval of the new province, six participants referred to pivotal decisions regarding the governance structure during the transition period:

"After the approval of the creation of the new Province, two commissions were created: the Apostolic project, comprising one Jesuit from each Province, presided over by the Provincial, ...; and the commission of the Government of the Province, composed of two Provincials and the Provincial of Spain. " (P. 12)

Infrastructure was closely linked to leadership and risk-taking: *"The decision was made at the table of provincials, where the leadership of the Provincial assumes all the risk" (P. 8). Implementation equally depended on holding diversity together through shared mission, integration was possible because "there's something that's above diversity, that doesn't cancel it out"; what "saved" the process was "the mission," allowing them to "see together" without losing diversity (P. 9). Execution was thus not merely technical or administrative, but relational and spiritual: governance structures had to sustain unity while preserving the diversity of provincial histories, identities, and apostolic contexts.*

4.3 Theme 3: cross-cutting issues

4.3.1 Discernment

4.3.1.1 Individual discernment Participants emphasized that discernment required personal engagement and reflective attention to the Spirit. Individual discernment also depended on inner freedom, which proved difficult when personal stakes were high: *"There was always a participation that was sought to be in the key of discernment—which required an inner freedom that is difficult to achieve when the issue directly concerns you" (P. 5). Prayer and attentiveness to spiritual guidance were central: "We did all pray about the issue and we were all aware that we were putting ourselves in interior freedom, in prayer to listen to the Lord what he was asking of us" (P. 11).*

4.3.1.2 Discernment in common Decision-making was deliberate and collectively discerned, aligned with the Jesuit mission and values. Participants emphasized that discernment is more than a method: *"Discernment is fundamentally an attitude: lis-*

tening to others; changing my position; what we are deciding is above and beyond us.” (P. 10).

“Discernment can sometimes be confused with a method. In discernment, the most important thing is not the method, but rather the attitudes; first, inner silence, in which there are no prejudices, no protagonism; I do not want to carry out my own idea; therefore, I am in inner silence.” (P. 10)

Collective spiritual reflection, including group prayer and shared spiritual experiences, shaped strategic decisions throughout the process. As one participant noted, *“when we were going to start the meeting, we had already prayed. We began with Our Father, a prayer asking Saint Ignatius to shed light” (P. 12).* This distinctively Jesuit approach positioned discernment as central, *“helping us a lot... Let us feel, live. What’s going on, where are we going, where is (the Spirit) blowing us now?” (P. 12).*

4.3.2 Way of proceeding

4.3.2.1 Cura personalis Participants emphasized the importance of personal care (*cura personalis*) throughout the integration process. This involved attentiveness to individual needs, relationships, and well-being, ensuring that each person felt supported and included *“In the face of differences and diversity, there was a lot of dialogue and generosity” (P. 6).*

“From the first moment I believed this was good and positive, yet I was not blind to its difficulties — I listened to the different provincials. I think that helped me personally a lot: I didn’t live this alone.” (P. 10)

Another participant described the personal engagement required: *“How did I experience it? Well, with total dedication, not only in time, not only in work, but I lived it feeling open, ...in great unity, with companions, with Jesuits, with lay people” (P. 10).* Personal care also involved fostering an environment of spiritual and emotional support: *“Taking care of the spiritual tone helped in the transition process, both for all the people who participated, as well as for the communities, institutions, Jesuits and laity” (P. 12).*

4.3.2.2 Cura apostolica Alongside personal care, participants highlighted the apostolic responsibility (*cura apostolica*) and focused on the province’s mission. This required generosity, openness, and collaboration among Jesuits and lay collaborators: *“I lived it with a sense of total surrender, which asked for great generosity, not ascetic, but willing and hopeful” (P. 10).*

Unity in mission was repeatedly emphasized: *“The union of spirits is very important, here we go together, working despite our diversities” (P. 12).* Through these

practices, the way of proceeding integrated personal and apostolic dimensions, maintaining both spiritual tone and mission orientation throughout the transition.

Amidst challenges and uncertainty, key figures expressed a profound sense of hope and transcendence:

"I lived the process with great hope because I was challenged by what we were seeing and contrasting over ten years. And even though difficulties arose, we nevertheless believed that the Spirit was asking us for something new." (P. 10)

This hope was accompanied by enthusiasm, as the process was seen as an opportunity for renewal: *"the process was about facing a new future... it was very important to me to revitalize the vision, the life, and mission of the Society" (P. 12).*

4.4 Theme 4: future challenges

We highlight the difficulties that may arise in the future within the context of the study.

4.4.1 Jesuit presence

Two participants highlighted changes in Jesuit presence as a key future challenge. Although a reduction in Jesuit personnel was widely acknowledged, this did not translate into a proportional decline in apostolic activity: *"There is almost no reduction in apostolic works... in all the works the presence of Jesuits has been reduced, but I believe that in apostolic reduction there has been very little..." (P. 14).*

This was not viewed purely as a decline: younger Jesuits saw integration as a way of *"not simply managing misery" but supporting new provincial projects, while recognizing the risk that "the weight of the institutions" could become burdensome as numbers fall (P. 13).*

4.4.2 Union of spirits

Three participants emphasized that union of spirits, understood as personal and spiritual integration, was recognized as essential but postponed during the initial stages. Structural consolidation took priority: *"The rational-structural aspects were accentuated, out of necessity, and what was most related to personal integration...was left for later" (P. 14).* Spiritual cohesion thus remained an ongoing task beyond formal integration.

4.4.3 Shared mission

Three participants stressed the growing importance of shared mission with lay collaborators. Some ambiguities persisted regarding its articulation and diversity: *"Some Jesuits do not see that it has been sufficiently clarified, although the majority work in collaboration... among lay collaborators the diversity is enormous, and work remains to be done" (P. 15).*

Participants noted that emerging lay vocations alongside declining Jesuit numbers reshaped the meaning of Jesuit presence: *"we talk about a lack of vocations and at the same time we are counting on lay vocations"* (P. 14). Yet this expanded mission raised the challenge of preserving a distinct apostolic and Ignatian identity: *"How to make the Society of Jesus in Spain a true apostolic and Ignatian platform. Not an NGO... Neither is an association of schools... The heart is the Gospel of Jesus Christ"* (P. 16).

4.4.4 Secularization

One participant identified secularization as a broader contextual challenge shaping future apostolic engagement: *"We face the challenge of how to position ourselves in a society that is highly secularized and racially diverse... Emergencies consume us and leave us no room for reflection"* (P. 17).

4.5 Temporal bracketing

While the four overarching themes reflect recurring patterns in participants' accounts, temporal bracketing helps process analysis and sensemaking by structuring the description of events.

On a temporal basis, the case of "Integration of the Spanish provinces of the Society of Jesus: a restructuring with Spirit" (Mogas 2024) shows certain continuities in the activities within each period, some shifts in authority configuration, changing coordination mechanisms and a progressive reallocation of jurisdiction. Each phase is defined by a dominant organizing mechanism (Langley 1999).

The temporal bracketing identified three phases over more than six years, each characterized by a dominant organizing mechanism (Fig. 4).

In the first phase, the decision to integrate was made through a process in which DC was explicitly present and documented, contributing to the consolidation of authority. The subsequent phases reflect the progressive translation of that decision

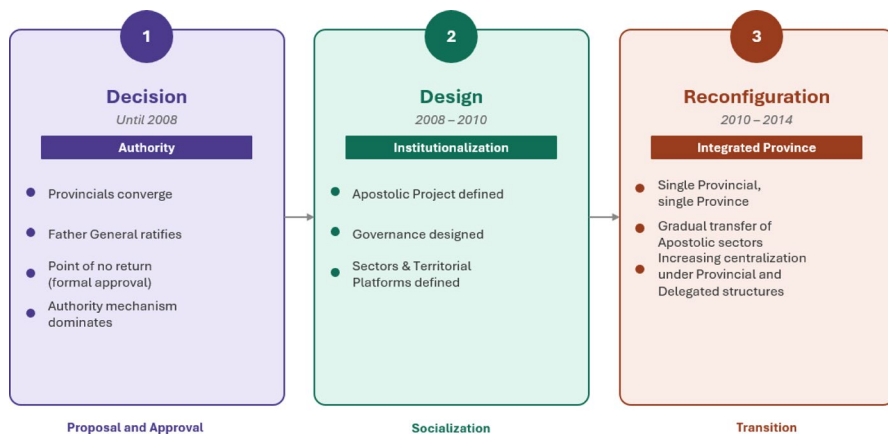


Fig. 4 Province integration process. *Source:* Authors' own work

into institutional design and organizational reconfiguration. Phase transitions are marked by changes in authority configuration and governance logic.

In the first phase, up to 2008, the process was driven primarily by authority: the Provincials of five Jesuit Provinces (Aragón, Bética, Castilla, Loyola, and Tarracónense) converged toward integrating provinces, preserving unity of government, while respecting territorial, cultural, and linguistic peculiarities. This was to align with GC35. Ratified by Father General, this formal approval marked a point of no return, after which integration became institutionally irreversible.

The second phase, from 2008 to 2010, shifted from decision to design. With the commitment in place, the focus turned to building the architecture of the new organization—defining the Apostolic Project, designing governance structures, and mapping out the Sectors and (Local) Territorial Platforms that would give the integrated Province its operational shape. The integration was characterized by ethical deliberation, in which decisions were weighed against Jesuit values and the overarching mission.

The third phase, from 2010 to 2014, brought the transition into reality. A single Provincial led a single Province, with Apostolic sectors gradually transferred and authority consolidated under the Provincial and Delegated structures. What had begun as a convergence of wills became a functioning, integrated province.

5 Discussion

Building on the empirical findings, this Discussion interprets how DC shaped the integration of the Spanish Jesuit provinces over time. The interviews with Jesuit leaders revealed a set of key concepts that were central to the process—strategic decision-making, execution, discernment, apostolic planning, and the Jesuit way of proceeding. We articulate these concepts through the *Circles of Discernment, Apostolic Planning, and Way of Proceeding* as an integrative and heuristic framework that emerges inductively from the case. Rather than offering a prescriptive model, the framework provides an interpretive lens to understand how discernment, strategy, and the Jesuit way of proceeding interact in practice, particularly under conditions of uncertainty, institutional restructuring, and mission renewal.

5.1 The circles of discernment, apostolic planning, and way of proceeding

The choice of concentric circles (Fig. 5. “The circles of Discernment, Apostolic Planning, and Way of Proceeding”) is theoretically grounded in two complementary sources.

First, within the Ignatian tradition itself, discernment has always been understood as operating across interdependent and nested dimensions—from the personal interior, to the communal, to the apostolic—in which each layer presupposes and conditions the others (de Dalmases 1990; García de Castro 2017). The concentric form thus reflects a logic already embedded in Jesuit practice rather than imposed from outside it.

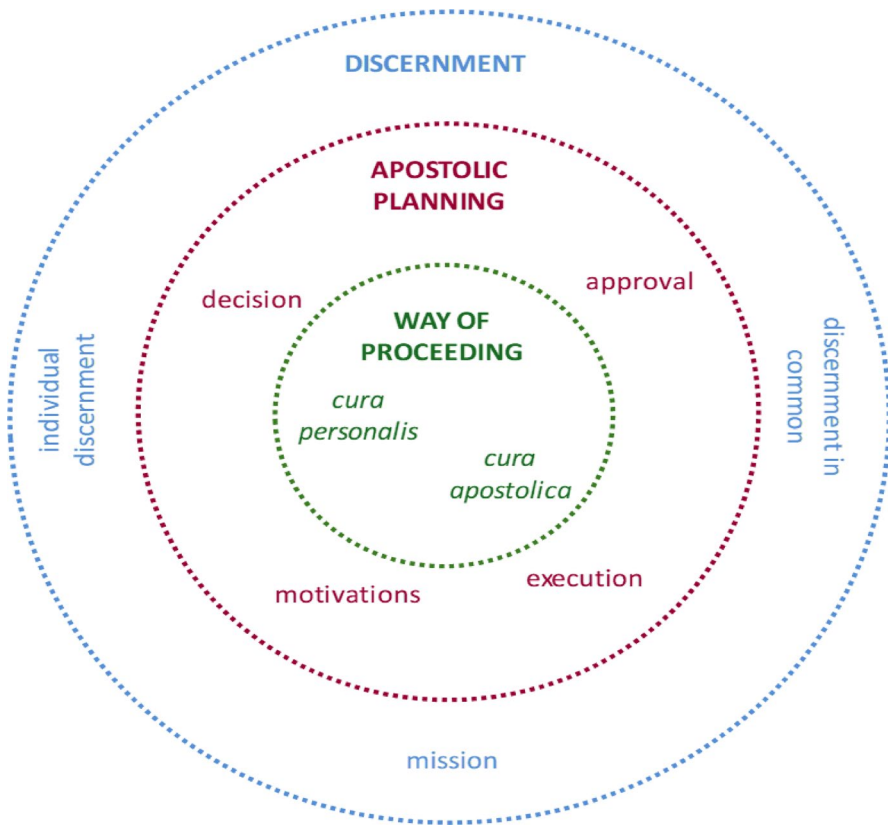


Fig. 5 The circles of discernment, apostolic planning, and way of proceeding. *Source:* Authors' own work

Second, from an organizational perspective, the nested structure resonates with processual approaches to strategy (Whittington 1996; Weick 1995), which conceptualize organizational action as emerging from layers of practice, identity, and meaning that are mutually constitutive rather than sequentially ordered. Symbolically, circles communicate non-hierarchical relationships, mutual inclusion, and belonging to a shared community, which is particularly fitting for an institution in which authority is exercised through collective discernment rather than positional power.

Together, the three circles—Discernment, Apostolic Planning, and Way of Proceeding, reflect the ongoing and cyclical nature of strategic leadership in an ecclesial context, where reflection and experience continuously inform future decisions and actions, creating a dynamic and adaptive strategic environment. The Way of Proceeding constitutes the innermost circle, representing the deepest layer of Jesuit identity from which apostolic planning grows outward. Discernment, as the outermost circle, functions not as a starting point but as the encompassing practice within which both planning and way of proceeding are continuously embedded and renewed. In this sense, the outermost position of Discernment signals not peripherality but encompassment: it is the spiritual environment within which all strategic action and organi-

zational identity are sustained over time. Conceptually, the framework contributes to the literature by articulating a processual understanding of strategy in Jesuit institutions, in which spiritual discernment is not external to planning but constitutive of how strategic decisions are formed, enacted, and revised over time.

The discussion unfolds through three interrelated circles that progressively specify how they operate in practice. The first examines the spiritual foundations that enable individual and collective discernment within Jesuit governance. The second addresses apostolic planning from a strategic perspective, highlighting how decisions—their rationale, approval, and implementation—are carried out. The third illuminates the spiritual foundation—way of proceeding—that sustain mission alignment over time.

5.1.1 Circle 1: discernment

Discernment is a holistic process that relies both on individual discernment understood as an attitude, and on DC, seen as a collective reflection that triggers benefits and ultimately orients decisions towards mission alignment. Rooted in the Ignatian tradition of attending to the “motions of the soul” (de Dalmases 1990) and in the call to read the signs of the times (Francis 2013), discernment unfolds as both a personal and communal practice. In the Spanish integration process, this was visible in the way participants addressed the distinct mission contexts of Catalonia and the Basque Country, including their linguistic, cultural, and ecclesial specificities. Rather than a movement from the “I” to the “We”, our findings suggest that DC reconfigures how individual and territorial positions are expressed, how differences are placed “*on the table*,” and how convergence is gradually reached in light of the common mission.

At the same time, this understanding of discernment as shaping the decision process is consistent with how DC has been described in the Jesuit tradition. In line with Pope Francis's emphasis on discernment as a way of reading and responding to the signs of the times (Francis 2013), Fr. P. H. Kolvenbach SJ, Superior General of the Society of Jesus (1983–2008), described DC as the shared pursuit of understanding God's will, knowing his desires and his purpose for the community in fulfilling its mission (de Vera 2007). Our findings show that this shared pursuit was not only a spiritual process in the integration of the Spanish provinces of the Society of Jesus, but also a way of structuring the strategic decision itself: how the issue was framed, how alternatives were considered and how the final decision gained consensus. In this sense, our findings extend prior work (Benefiel 2008) by suggesting that DC influences not only the spiritual orientation of decisions (García de Castro 2017), but also the processes through which strategic choices are made and collectively sustained (Delbecq 2003).

This way of structuring decisions also helps explain why DC is experienced as a process that unfolds over time. For Fr. Adolfo Nicolás SJ, Superior General of the Society of Jesus from 2008 to 2016, DC is not based on instant insight but on a slow and real search that requires time (Nicolás 2009). Although Ignatian discernment recognizes moments of sudden clarity, DC is different in nature: it develops through progressive exploration, reflection, and communal deliberation. This resonates with our findings, particularly in the way the integration process required time to “*harmonize*

the rhythms and styles of each province” and to move gradually toward consensus around a common mission.

This emphasis on process also assumes certain interior dispositions at the individual level. DC, therefore, builds personal prayer and individual discernment, which also uses the felt movements of consolation and desolation to discern the presence, activity, and will of God (Rambla 2008). Individual discernment looks within personal interiority for these movements. Our findings confirm the importance of these conditions but also show that achieving the required “*inner freedom*” can be difficult when personal stakes are involved, which in turn affects how individuals contribute to the collective decision-making process.

At the same time, these individual dispositions take shape within the communal process. Our findings highlight that DC was key in seeking God’s will throughout the decision process. However, DC was lived as an attitude rather than an explicit method as proposed by García de Castro (2017), shaping how participants engaged with one another, approached the decisions and remained open to its outcome. In this sense, while prior work emphasizes the structured alternation between personal and communal moments, our findings suggest that what sustains the process is less the method itself and more the underlying dispositions that guide participation.

This becomes particularly visible in how the integration process itself unfolded. The process was rich in deliberations, where decisions were deeply influenced by Jesuit values and a mission-driven ethos. While this resonates with Benefiel’s (2008) discussion on how discernment supports ethical decision-making, our findings suggest that these deliberations went further: they shaped how priorities were defined and how the final decision was collectively sustained.

5.1.2 Circle 2: apostolic planning

DC can be understood as a prior condition for apostolic planning at all levels of the Society of Jesus’ organizational structure, as a practice that shapes how planning is carried out, grounded in a collective understanding of mission. In line with Delbecq (2016) who argues that discernment structures strategic decision-making in mission-driven organizations, and with Sosa (2017) who links it directly to the definition of apostolic priorities, our findings show that structure follows mission. This is visible in the integration process where participants emphasized that “*what saved the process was the mission... something above diversity*” (P. 9) and that “*the elaboration of a common Apostolic project... defined us a lot, and not the legal structure*” (P. 12).

The decision to integrate all the provinces of the Society of Jesus in Spain into one single proto-province is considered a strategic decision. As our findings show, this process was marked by complexity, diversity, and uncertainty, requiring multiple considerations and a gradual process of shared understanding. This aligns with Johnson (2008) who characterizes strategic decisions by uncertainty, long-term consequences and organization-wide impact, as well as with Mintzberg (1976), who describes them as “*unstructured processes*” shaped by iteration and ambiguity. Empirically, this was reflected in participants’ comments that the integration initially “*seemed impossible*” (P. 9), and in the recognition of uneven starting conditions, where “*there was a diversity of provinces, some of them very weak... the strong did not see the need for inte-*

gration” (P. 6). Furthermore, such decisions entail significant commitments in terms of actions, resource allocation, and organizational precedents (Mintzberg, 1976), as reflected in the structural and governance changes involved in the integration process.

Within this second circle, while strategic management literature emphasizes uncertainty, commitment, and adaptation (Mintzberg 1978; Johnson, 2008), the present case suggests that discernment provides a distinctive spiritual and relational infrastructure (visible in processes of deliberation, consensus-building, and communication) This resonates with the strategy-as-practice perspective (Whittington 1996), which understands strategy as emerging from social interactions and shared practices rather than formal planning alone. Empirically, this infrastructure is reflected in the “*table of provincials*,” where “*there is debate, discernment, and finally a decision*” (P. 8), and in the emphasis on transparency and dialogue, where differences were “*on the table... with great clarity*” (P. 10). In this sense, discernment does not merely accompany strategic decision-making but shapes the relational conditions through which strategic choices are formulated, made, and sustained over time.

The Apostolic Planning circle is built based on evidence from the case study and illustrates that a successful strategy must be contextual, actionable, and adaptable, leading to effective execution. In this sense, Apostolic Planning reflects a long-term vision grounded in mission-discernment, ensuring that decisions and execution remain aligned with the mission, particularly in contexts marked by diversity and the need for shared understanding. This aligns with Andrews (1997), who conceptualizes strategy as the alignment between organizational action and mission, and with Freeman (1984), whose stakeholder perspective highlights the importance of incorporating diverse actors and contexts into strategic directions. Empirically, this is reflected in the emphasis on “*greater apostolic effectiveness*” (P. 5) and on responding to “*new challenges with another apostolic project with a broader outlook*” (P. 5), indicating that planning was oriented toward transformation rather than decline, as reflected in “*we’re not dying, we’re transforming*” (P. 1).

Execution focuses on practical work of communication, implementation, evaluation, and infrastructure, as evidenced in the emphasis on transparency, participation, and continuous review. At this level strategic decisions are translated into concrete organizational practices, with apostolic planning providing direction by guiding what should be executed and why. This aligns with Hrebiniak (1992), who emphasizes that execution is the central challenge of strategy, requiring alignment between decisions and organizational processes, and with Kaplan (2000), who stresses the importance of linking strategic intent to operational action. Empirically, this is reflected in the post-decision emphasis on “*transparency, participation, and socialization*” (P. 6), in the commitment to “*constant evaluation... nothing is closed*” (P. 5), and in the structured implementation through commissions and shared governance designs (P. 12). In this sense, execution is not merely administrative but an ongoing, iterative process through which discerned decisions are collectively enacted, monitored, and adjusted over time.

5.1.3 Circle 3: way of proceeding

This circle can be understood as a mission-centered structure inspired by Jesuit practice and, overall, it illustrates how care for the mission, care for people, and a common way of proceeding are interdependent and mutually reinforcing. This is reflected in the case, where the mission plays a central role in holding together diversity, and guiding the integration process, as participants emphasized that “*what saved the process was the mission... something above diversity*” (P. 9). This dual focus resonates with Ignatian leadership literature (Lowney 2009; Nullens 2019), which highlights the integration of mission effectiveness and personal care as a defining feature of Jesuit governance. The *Cura apostolica* is focused on apostolic works—the concrete ministries and actions that express the mission while the *Cura personalis*, emphasizes care for people, particularly Jesuits in this case, ensuring that they are supported and formed to carry out the mission. In practice, this dual focus becomes particularly visible in moments of organizational change, where participants described the need to sustain both apostolic effectiveness and personal care simultaneously. Empirically, this was reflected in concerns about “*ensuring that the government... would care for and balance the personal cure and the apostolic cure*” (P. 12), as well as in efforts to support individuals throughout the transition, where “*taking care of the spiritual tone helped in the process*” (P. 12). In this sense, both dimensions operate in parallel, and their balance, or creative tension, becomes critical in contexts of change, where sustaining the mission requires both effective structures and attention to people. This aligns with Benefiel (2005) and Delbecq (2003), who argue that spiritually grounded leadership integrates organizational purpose with personal transformation rather than treating them as separate domains.

The “way of proceeding” can be understood as the integrative dimension that holds together mission, people, and governance by providing a shared approach to action. In the case, this is reflected in processes of integration, the development of new governance structures, and ongoing evaluation practices, which together sustain coherence while allowing for diversity across contexts. Empirically, this is visible in the emphasis on continuous adaptation, where “*nothing is closed... treat it as a continuous process of evaluation*” (P. 5), and in the effort to maintain unity in diversity, grounded in the shared mission that allowed participants to “*see together*” despite differences (P. 9). This resonates with the Ignatian concept of a “*way of proceeding*” (General Curia 2020; Tetlow 2016), understood not as a fixed method but as a shared orientation that guides action across changing contexts. In this sense, the way of proceeding does not prescribe specific decisions but sustains coherence over time by shaping how decisions are made, implemented, and continuously reinterpreted.

5.1.4 Boundary conditions: context-specific and transferable elements

The three circles vary in how tightly they depend on Jesuit context, which clarifies what the model offers beyond this case.

First, the Way of Proceeding circle is the most context-bound: the *cura apostolica*–*cura personalis* pairing, the vow-based authority structure, and the theological

vocabulary of consolation and desolation are specific to Ignatian spirituality and do not travel intact to secular settings.

Second, the Apostolic Planning is intermediate: stripped of its religious vocabulary, the underlying logic that planning should follow from a collectively held purpose, and that relational infrastructure (deliberation, consensus-building venues, transparent communication) shapes strategy as much as formal process, mirrors mechanisms already identified in mission-driven and values-based organizations more broadly (Andrews 1997; Freeman 1984).

Finally, what is context-specific here is the source of legitimacy—discernment of God's will rather than, say, a board-ratified strategic plan—not the structural insight that purpose precedes structure. Discernment, as the outermost circle, is the most abstractable: its core mechanism, a disciplined, recurring practice of collective reflection that surfaces and reconciles differing positions before a decision is finalized, does not presuppose a religious frame. Secular mission-driven organizations (cooperatives, NGOs, B-corps, employee-owned firms) could adopt an analogous practice of structured collective deliberation oriented toward a shared purpose, even without its spiritual content.

This distinction also marks the limit of transferability claimed here. The model travels as a structural logic—purpose-grounded deliberation preceding and conditioning strategic action—rather than as a transposable method; secular organizations lacking an equivalent shared telos or a forum with comparable legitimacy may find the outer circle harder to instantiate than the case suggests. Testing this boundary in non-religious mission-driven organizations is a task for future comparative research rather than a claim this single case can settle.

In closing, beyond interpreting past decisions, the findings also illuminate emerging governance challenges that shape future apostolic planning. One key challenge concerns the integration of younger generations within Jesuit institutions, particularly in contexts marked by economic inequalities, cultural pluralism, digital transformation, climate concerns, societies polarizations, women's participation and changing forms of commitment. Maintaining mission effectiveness amid rapid social, economic and ecological change will require continued discernment capable of reading emerging realities without losing apostolic identity and vigor. Another critical area involves the ongoing integration of lay collaborators into Jesuit identity and mission, moving beyond functional collaboration toward shared responsibility in governance and discernment. In this regard, practices of DC, synodality, and collaborative leadership emerge as promising avenues for fostering participation, dialogue, trust, and mission alignment. These developments highlight the need for ecclesial institutions—and Jesuit universities in particular—to continue experimenting with discernment-based approaches that respond creatively to contemporary challenges while remaining rooted in Ignatian spirituality and way of proceeding.

6 Conclusions

This study makes three principal contributions. First, it offers a rare qualitative longitudinal case analysis of DC in action, addressing a gap in empirical research on how discernment concretely shapes strategic decision-making processes in ecclesial organizations. Second, it advances a conceptual contribution through the *Circles of Apostolic Planning in Ecclesial Institutions*, which articulates a processual understanding of strategy in which spiritual discernment is constitutive of decision formation, execution, and adaptation over time. Third, the study provides practical insights for ecclesial institutions and Jesuit universities by showing how discernment-based governance can foster collaboration, sustain mission alignment, and nurture hope amid demographic decline, organizational restructuring, and societal uncertainty. These contributions emerge from a process in which seventeen Jesuit leaders described Discernment in Common not as a method they applied, but as a shared attitude that shaped every dimension of a six-year institutional transformation.

By analyzing a complex ecclesial transformation, the research demonstrates that DC operates less as a formalized technique and more as a shared spiritual and individual attitude that shapes strategic choices, execution processes, and way of proceeding practices over time. The findings show how discernment, when embedded in common reflection, participation, and mission-oriented dialogue, enables ecclesial institutions to navigate uncertainty while remaining faithful to their charism. Empirically, the study highlights how phased implementation, broad consultation, and sustained discernment supported mission renewal amid demographic and structural challenges faced by the Society of Jesus—confirming that the Circles of Apostolic Planning framework captures not a prescriptive model but a lived organizational reality.

Beyond the Jesuit case in Spain, the insights offered are relevant to Jesuit universities and other mission-driven organizations seeking to exercise collaborative leadership, align strategy with values, and embody hope as a guiding principle in governance and decision-making in the twenty-first century. In this sense, the study speaks directly to the congress theme of HOPE25: discernment-based governance does not merely accommodate hope as a disposition—it actively generates it. When institutions create the conditions for genuine communal discernment, they cultivate shared confidence that the direction chosen is larger than any individual will, rooted in a mission that transcends institutional survival. That, the findings suggest, is what makes hope not merely a feeling but a governance practice.

This study has several limitations that open avenues for future research. First, it draws on a single qualitative case within the Society of Jesus in Spain, limiting transferability to other ecclesial organizations without contextual adaptation (de Dalmases 1990; Stake 1995). Second, the analysis relies primarily on retrospective interviews with senior governance actors. While these provide rich insight into discernment-based decision-making, they may be shaped by memory, post-hoc interpretation, and participants' institutional positions, potentially producing a more harmonious account that underrepresents issues of power, conflict, and dissenting voices. This is further compounded by the temporal distance of the events (2008 decision; 2014 integration) and the unavailability of some key actors. Third, the qualitative design does

not measure the quantitative impact of discernment on strategic outcomes (Johnson 2008; Mintzberg 1976). Future research should examine comparative cases across Jesuit or ecclesial organizations, adopt longitudinal designs to capture discernment in real time, and incorporate broader perspectives, including lay collaborators, younger Jesuits, and those more peripheral to decision-making, to surface organizational tensions and alternative interpretations.

Acknowledgements The authors wish to thank the Jesuits, particularly Fr. F. J. Ruiz SJ

Author contributions EM collected data; EM, CDS, and AV designed the research, analyzed data and wrote the paper.

Funding Open Access funding provided thanks to the CRUE-CSIC agreement with Springer Nature.

Data availability The information needed to reproduce all the reported results is available at request to corresponding authors.

Declarations

Conflict of interest The authors declare no competing interests.

Human and animal participants All procedures performed in studies involving human participants were in accordance with the ethical standards of the institutional and/or national research committee and with the 1964 Helsinki declaration and its later amendments or comparable ethical standards.

Informed consent Informed consent was obtained from all participants included in the study.

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