

Universidad Pontificia Comillas

**Doctorate of Business Administration in Management
and Technology**

DISCERNING STRATEGY IN ECCLESIAL ORGANIZATIONS

**The integration of the Society of Jesus provinces in
Spain: a restructuring with Spirit (2008-2014).**

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1. Abstract

This thesis explores the impact of Discernment in Common (DC) on strategic decision-making within ecclesial organizations, focusing on the integration of Jesuit provinces in Spain from 2008 to 2014. It examines how Ignatian spiritual practices influence organizational strategies and outcomes. Utilizing Saunders' constructs (2008), the study assesses key factors such as communication, stakeholder engagement, implementation alignment, and continuous evaluation. Through a qualitative methodology including one case study, and interviews, the research highlights the practical benefits of integrating discernment into strategic processes. Key findings demonstrate the role of DC in fostering continuous reflection, strategic alignment, and ethical decision-making, ensuring that decisions align with the broader mission. The integration process underscores the necessity of effective communication, stakeholder engagement, and robust infrastructure. Future challenges include adapting to demographic changes and fostering unity amidst diversity. The thesis contributes to understanding how spiritual principles can inform and enhance strategic decision-making in ecclesial contexts, providing insights into adaptive leadership and mission-centric strategies.

2. Introduction

2.1. Disclaimer

This Thesis has been produced using the help of Generative AI tools such as ChatGPT and Grammarly to enhance language, clarity, and semantics. In any case, such tools have not been used to produce content nor to define the overall methodology and structure of the thesis. Nvivo software has also been used to help in the process of coding themes. The management of the references has been done with the help of RefWorks, including a detailed database of many more references than cited in this document.

The anonymity of interviewees shall be kept according to the accepted and signed protocol of interviews.

Last but not least, the terms Discernment in Common or Common/Communal Discernment are used throughout the reviewed literature indistinctively. In this thesis, Discernment in Common is the selected terminology and will be referenced as DC.

2.2. Purpose and research context

The purpose of this research is to explore the impact of DC on strategic decision-making within ecclesial organizations, specifically focusing on the integration of Jesuit provinces in Spain.

This study aims to understand how the Ignatian spiritual practice of DC influences organizational strategies and outcomes. By examining the integration of the Spanish provinces of the Society of Jesus from 2008 to 2014, this study seeks to measure the impact of DC on strategic decisions, using the constructs identified by Saunders (2008)- Communicating the Initiative, Stakeholder Buy-In, Alignment of Implementation, Learning from Continuous Evaluation and Adaptation, Creating the Infrastructure for Deployment, Understanding the Business Drivers: Understanding the key factors and motivations driving the integration process, and Identifying Deployment Options.

The context of this study is deeply rooted in the significant movements within the global Roman Catholic Church, particularly those led by Pope Francis. His apostolic exhortation "*Evangelii Gaudium*" in November 2013 marked a pivotal call for a new phase of evangelization characterized by decentralized decision-making and evangelical discernment (Catholic Church & Francis, 2013). This was further highlighted in 2015 at the General Synod, where Francis advocated for a "synodal Church" – one that listens deeply and inclusively (Francis, 2015). Additionally, the Synod on Synodality, which began in 2021, emphasizes the importance of synodal processes and DC in the life of the Church, further underpinning the relevance of this study.

Within the Society of Jesus, several mandates from General Congregations have emphasized the need for potential integration of provinces to better align with the mission and adapt to contemporary challenges. The 35th GC (2008) and the 36th GC (2016) specifically called for structural adaptations and greater collaboration among provinces to enhance their apostolic effectiveness. These catholic congregations recognized the changing demographics and societal contexts, urging provinces to consider consolidation to strengthen their mission and governance.

These ecclesiastical shifts have profoundly influenced my personal and professional journey. As a faculty member of the Discerning Leadership program, a collaborative initiative aimed at enhancing the leadership capacities of those at the helm of religious orders and Vatican

Dicasteries, I have gained significant insights into the operationalization of DC. A pivotal encounter with Fr. Francisco José Ruiz SJ, a specialist in this field, led to focusing on the integration of the Spanish provinces of the Society of Jesus. This integration process not only symbolizes a practical manifestation of discernment but also serves as a case study for this research.

Challenges

The integration of the Spanish provinces of the Society of Jesus (2008-2014) presents several challenges that this research aims to address. These challenges include:

1. **Maintaining Spiritual Integrity:** Ensuring that the integration process remains deeply rooted in Ignatian spiritual practices, particularly DC while adapting to contemporary organizational needs. Testimonies highlight the difficulty of maintaining a strong sense of community and shared spiritual mission amidst structural changes. The integration led to a feeling of loss among Jesuits who were used to the smaller, more familiar provincial structures.

2. **Strategic Alignment and Identity:** Aligning the diverse strategic objectives of the formerly separate provinces into a cohesive, unified strategy that reflects the mission and values of the Society of Jesus. The testimonies reveal that one of the significant challenges was ensuring that the new, larger province could foster a sense of identity and belonging among its members. This required a careful balance between maintaining local traditions and creating a unified provincial identity.

3. **Stakeholder Engagement and Resistance:** Effectively engaging a wide range of stakeholders, including Jesuit members, lay collaborators, and the broader ecclesial community, in the discernment and decision-making processes. The integration process faced resistance from members who were accustomed to their provincial traditions and found it challenging to imagine a new, larger organizational structure. Overcoming these resistances required extensive dialogue, meetings, and a collective effort to reimagine their mission together.

4. **Adapting to External Changes and Ensuring Future Sustainability:** Navigating external pressures, such as secularization trends, changing demographics, and evolving societal expectations, while maintaining a strong commitment to the Jesuit mission of faith and justice. The integration required a forward-looking approach, embracing the limitations and demographic changes as opportunities for innovation and renewed mission focus. Testimonies reflect a need to address the declining number of Jesuits and the importance of embracing new ways of fulfilling their mission in a rapidly changing world.

5. **Operational Viability and Governance:** Addressing practical operational challenges such as resource allocation, governance structures, and implementation of strategic decisions in a manner that supports both spiritual and organizational goals. The testimonies indicate that the integration process was a significant logistical challenge, involving the reorganization of over 1,300 Jesuits and 300 institutions. Ensuring effective governance across such a large and diverse province was a major concern, with a need for clear communication and efficient management structures.

Contextual Data

In the context of ecclesial organizations, the need for effective strategic decision-making is underscored by several key statistics and trends. The Roman Catholic Church, with over 1.3 billion adherents globally, faces numerous challenges, including declining vocations, shifting

societal engagement with religious institutions, and the need for organizational adaptation to changing external environments (Glatz, 2021).

The Jesuit order, specifically, has experienced significant demographic shifts. In 2008, there were 18,815 Jesuits worldwide, a number that has since decreased to 15,842 in 2023, reflecting broader trends of declining religious vocations (General Curia Rome, 2024). In Spain, the integration of five distinct Jesuit provinces into a single province was not merely an administrative adjustment but a strategic and spiritual endeavor aimed at revitalizing the mission and effectiveness of the Jesuit community in the region.

The demographic trends within the Jesuit order in Spain have been particularly concerning. Between 2010 and 2020, the number of Jesuits in Spain was expected to decline significantly. This period anticipated a decrease of nearly 600 Jesuits, representing a 58% reduction over ten years. This drastic decline highlights the urgent need for strategic integration and effective resource management to ensure the continuity and vitality of the Jesuit mission in Spain (InfoSJ, 2024).

The large dimensions of the newly created Province of Spain, which initially included over 1,000 Jesuits and 300 institutions and apostolic works, faced a substantial reduction by more than 20% when reclassified with new criteria. Additionally, the annual loss of more than 50 Jesuits due to deaths exacerbated the challenges of maintaining a robust and active community (InfoSJ, 2024).

This decline in numbers is further compounded by the broader societal trends in Spain, where the population's religious affiliation has been shifting. In 2008, 79% of the Spanish population identified as Catholic, but this figure had decreased to 67% by 2019. During the same period, the proportion of non-believers or atheists more than doubled from 18% to 29% (InfoSJ, 2024).

Table 1 illustrates the anticipated decline in the number of Jesuits in Spain from 2010 to 2020:

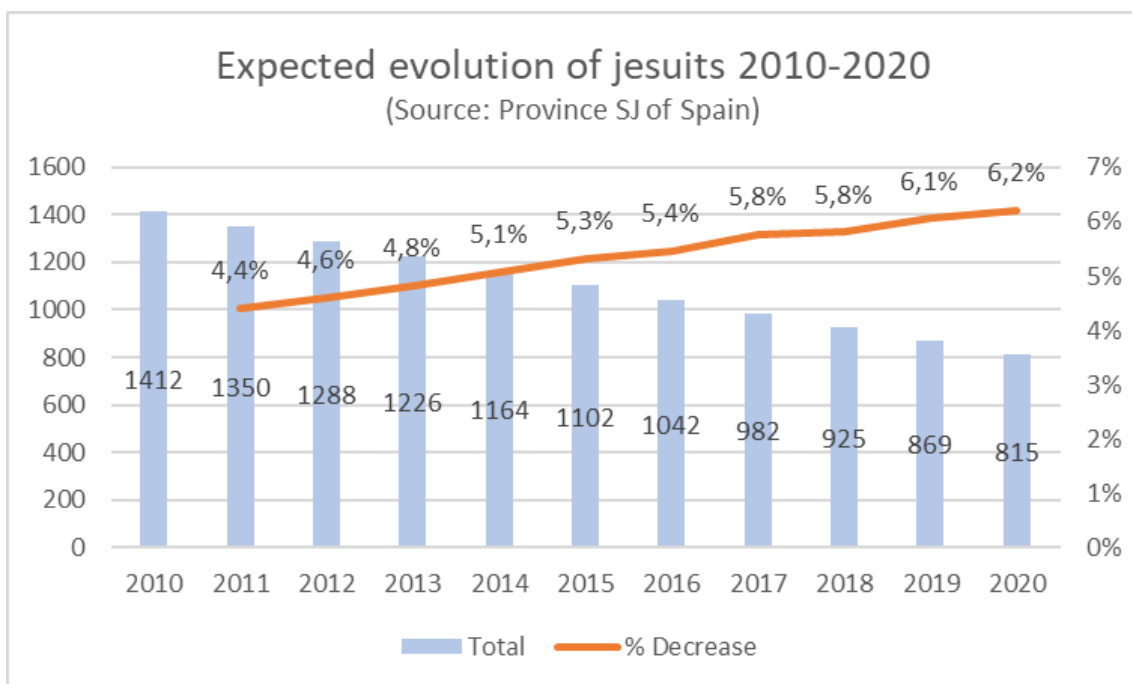


Table 1 Expected evolution of Jesuits in Spain as of 2010

Furthermore, the apostolic presence of the Society of Jesus in Spain as of 2017 included a total of 229 works (after a reclassification with new criteria, following the integration), divided into diverse tasks such as education, social justice, spiritual accompaniment... even scientific research and theological reflection. Currently (Table 2), as indicated by one of the interviewees of the integration case, ten years after the integration (2014) "there is almost no reduction in apostolic works despite the reduction in Jesuit numbers".

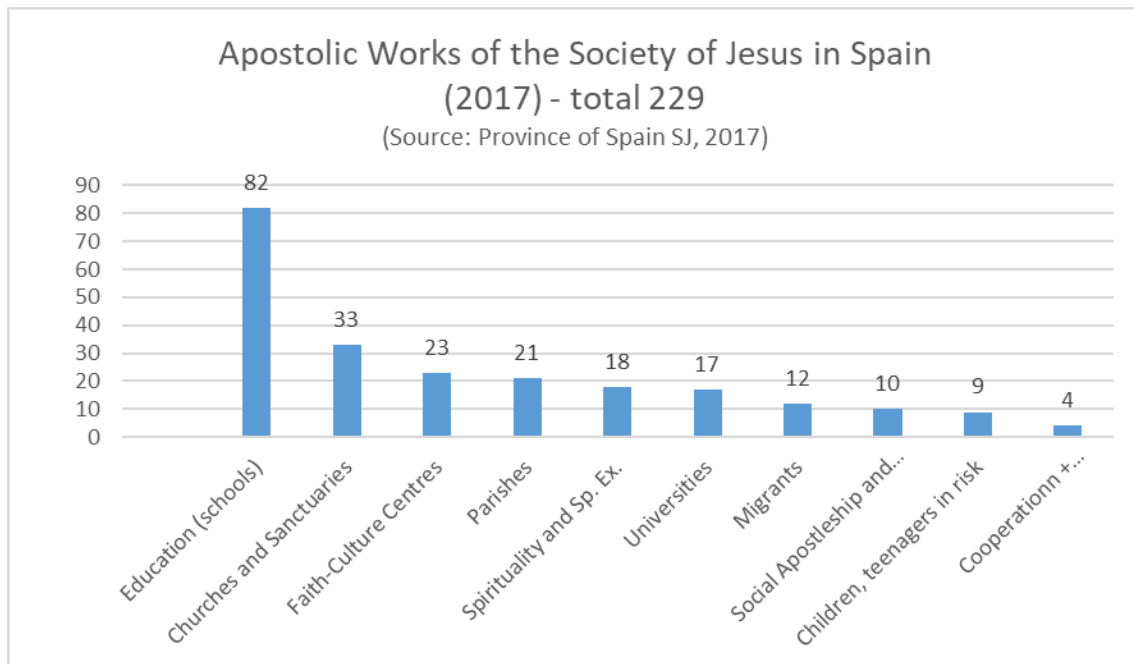


Table 2 Apostolic works of the SJ in Spain (2017)

Theoretical framework

The theoretical framework of this research integrates ethics, spirituality, and leadership through key concepts such as spiritual leadership (Fry, 2003), responsible leadership (Nullens, 2019; Scharmer, 2016), and Ignatian practices focused on personal and organizational transformation. In terms of individual and DC and strategy, it emphasizes the integration of secular and spiritual discernment (Allen, 2017; Benefiel, 2008; Burton, 2017; Delbecq, 2003; Falque, 2004; Miller, 2020) with strategic management theories (Andrews, 1997; Ansoff, 1965; Mintzberg, 1985; Planellas, 2019; Whittington, 1996), alongside the importance of integrating contemplative practices into daily management (Delbecq et al., 2016) and execution with actionable insights (Saunders, 2008). The ecclesial context is framed by the Apostolic Exhortation *Evangelii Gaudium* (Pope Francis, 2013), mandates from General Congregations of the Society of Jesus (1966-2016), the Letter on DC (Sosa, 2017a), and contemporary insights on discernment's role in governance and management (Kheng, 2023; Pfang, 2015; Becquart, 2022).

2.3. Justification of the research topic

The existing literature underscores the significance of DC and its impact on strategic decision-making within ecclesial organizations, particularly where spirituality and management are

deeply intertwined. However, there remains a gap in understanding how these practices specifically influence strategic decisions within the unique context of the Jesuit order, especially during significant structural changes such as the integration of provinces.

Importance of DC in Strategic Decision-Making

DC is a cornerstone of Ignatian spirituality, emphasizing collective reflection and decision-making guided by spiritual principles. Previous studies have shown that such practices can enhance organizational cohesion, align strategies with core missions, and foster inclusive decision-making environments (Benefiel, 2005; Fry, 2003). However, there is limited empirical evidence on how DC directly impacts strategic decisions in ecclesial settings, particularly during large-scale organizational changes.

Relevance to the Society of Jesus

The Society of Jesus, with its rich tradition of Ignatian spirituality, provides a unique case for studying the effects of DC on strategic decision-making. The integration of the Spanish provinces from 2008 to 2014, which involved merging five distinct provinces into a single entity, offers a practical example of how DC can be applied in complex organizational contexts. This integration was not just an administrative necessity but a strategic effort to revitalize the Jesuit mission in Spain amidst declining vocations and changing societal dynamics.

Addressing Declining Vocations and Demographic Shifts

The demographic trends within the Jesuit order in Spain are particularly concerning, with a significant decline in the number of Jesuits from 1,412 in 2010 to 815 in 2020 (Province of Spain). This decline underscores the need for strategic integration and effective resource management to ensure the continuity and vitality of the Jesuit mission. The integration process aimed at addressing these challenges by consolidating resources, aligning strategic objectives, and fostering a unified provincial identity.

2.4. Objectives and scope of the research

The general objective of this research is to explore and understand the impact of DC on strategic decision-making within the Jesuit provinces in Spain. The study aims to analyze how Ignatian spiritual practices, particularly DC, influence organizational strategies and outcomes during the integration of the Spanish provinces of the Society of Jesus from 2008 to 2014.

To achieve the general objective, the following specific research questions will guide the study:

1. How does DC influence strategic decision-making processes within the Jesuit provinces?

This involves understanding the role of DC in shaping strategic directions, aligning with the Society's mission, and fostering inclusive decision-making environments.

2. What are the impacts of DC on stakeholder engagement and buy-in during the integration process?

This focuses on assessing how effectively DC engages Jesuits, lay collaborators, and other stakeholders, ensuring their commitment to the integration process.

3. In what ways does DC affect the implementation and alignment of strategic decisions within the Jesuit provinces?

This examines how strategic decisions made through DC align with the overall mission and goals of the Society of Jesus and how these decisions are implemented across the newly integrated province.

4. How does continuous evaluation and adaptation informed by DC contribute to the success of strategic initiatives?

This explores the role of feedback and continuous evaluation in refining and adapting strategic initiatives, ensuring they remain aligned with spiritual and organizational objectives.

5. What infrastructure and resources are necessary to support DC within the context of strategic management?

This identifies the essential structures, resources, and conditions that facilitate effective DC, supporting strategic management and organizational coherence.

Scope of the Study

The research focuses on the integration of the five Jesuit provinces in Spain, examining how DC practices were implemented across these regions and their collective impact on strategic decisions.

Timewise, it covers the period from 2008 to 2014, during which the integration process took place. This timeframe allows for an in-depth analysis of the preparation, implementation, and evaluation phases of the integration.

The research includes the entire organizational structure of the Jesuit provinces in Spain, from the provincial leadership to individual members and lay collaborators. This comprehensive scope ensures that the study captures the diverse perspectives and experiences of all stakeholders involved in the integration process.

The study situates the integration within the broader context of the Roman Catholic Church and societal changes in Spain, including declining vocations and shifting religious affiliations. This contextual analysis provides a deeper understanding of the external factors influencing the integration process and the strategic decisions made.

In this document, the term “Ecclesial” is used to describe elements belonging to and emanating from the Roman Catholic Church. This scope includes not only the institutional and hierarchical dimensions of the Catholic Church but also the broader community of laypersons, religious orders (both male and female), and various movements within the Catholic Church, including social, spiritual, youth, and prayer groups, all of which contribute to the church's life and mission.

“Ecclesial” extends beyond the ordained clergy to include the laity, acknowledging their active role in the church’s mission, as highlighted in the Second Vatican Council’s *Lumen Gentium* (1964). It also encompasses religious orders, recognizing their unique charisms and contributions to the church's spiritual and social mission (Rahner, 1963).

The research explores several key themes, including the role of Ignatian spirituality in strategic management, the dynamics of DC, stakeholder engagement, and the practical challenges and successes encountered during the integration.

Contribution to Theoretical and Practical Knowledge

By exploring the impact of DC on strategic decision-making, this research contributes to both theoretical and practical knowledge in the fields of organizational behavior, strategic management, and ecclesial studies. It bridges the gap between spirituality and management, providing a nuanced understanding of how spiritual principles can inform and enhance strategic decision-making processes.

This study enriches existing literature by providing empirical evidence on the integration of spiritual discernment with strategic management, specifically within the context of the Jesuit provinces. It bridges a gap in understanding how catholic religious organizations adapt and implement strategies, offering new insights into the role of ethical and spiritual practices in organizational transformations. By highlighting adaptive leadership, mission-centric strategies, reflective practice, and effective communication, the research contributes to a more comprehensive understanding of strategic processes in ecclesial contexts. Additionally, it offers innovative approaches to managing demographic and resource challenges, providing practical solutions for other religious organizations.

2.5. Methodological Approach

Epistemology, from the Greek *Episteme*, (Aristotle, 1968) is a branch of philosophy that deals with knowledge, using the principle of induction – going from the particular to the general.

This research design aligns with the epistemology of science by embracing a qualitative approach grounded in the pursuit of understanding and knowledge generation (Comte, 1856; Schutz, 1962; Shils & Finch, 1949). By framing the research question and delineating key concepts, the design reflects a commitment to clarity and precision in inquiry.

Moreover, the exploration of DC and strategic decisions within ecclesial organizations acknowledges the complexity of human phenomena and the need for subtle understanding.

In adopting a qualitative methodology, the study recognizes the subjective nature of human experiences and seeks to uncover meaning through in-depth exploration and interpretation. Triangulation, a central tenet of qualitative research (Stake, 1995), further enhances the credibility and reliability of findings by drawing on multiple data sources and perspectives. Thus, this research design embodies the epistemological principles of rigor, reflexivity, and a commitment to generating knowledge that is contextually rich and socially relevant.

In Annex G, Epistemology of Scientific Knowledge and Sociology, there is a detailed analysis of the historical evolution of scientific knowledge and the development of sociology as a scientific discipline.

The research methodology comprises three primary components:

1. Design, Case Study, and Interviews:

Aligns with qualitative science epistemology (Creswell & Poth, 2018; Glaser & Strauss, 1967) and focuses on understanding and generating knowledge.

Development of a unique case: "The integration of the Spanish provinces of the Society of Jesus: a restructuring with spirit (2008-2014)."

2. Qualitative Research:

Phase 1 (2021-2022): Conducted 8 interviews (Kvale, 2006), and reviewed internal documents of the Society of Jesus, and public databases.

Phase 2 (2023-2024): Conducted 9 more interviews, a literature review (Booth, 2019), and analyzed constructs of measurement (Saunders, 2008).

The literature review for this research was conducted in four stages: Initial Scoping (Nov 2021), Literature Collection (Jul-Dec 2022), Detailed Review and Analysis (Jan-Dec 2023), and Synthesis and Integration (Jan-May 2024). The process involved sourcing relevant articles from academic databases and ecclesial documents, focusing on themes like DC, Ignatian spirituality, and strategic decision-making. Key activities included identifying primary themes, gathering diverse sources, analyzing gaps and frameworks, and integrating findings into the thesis.

Utilized both teaching case and research case methodologies (Stake, 1995), including triangulation to enhance credibility and reliability.

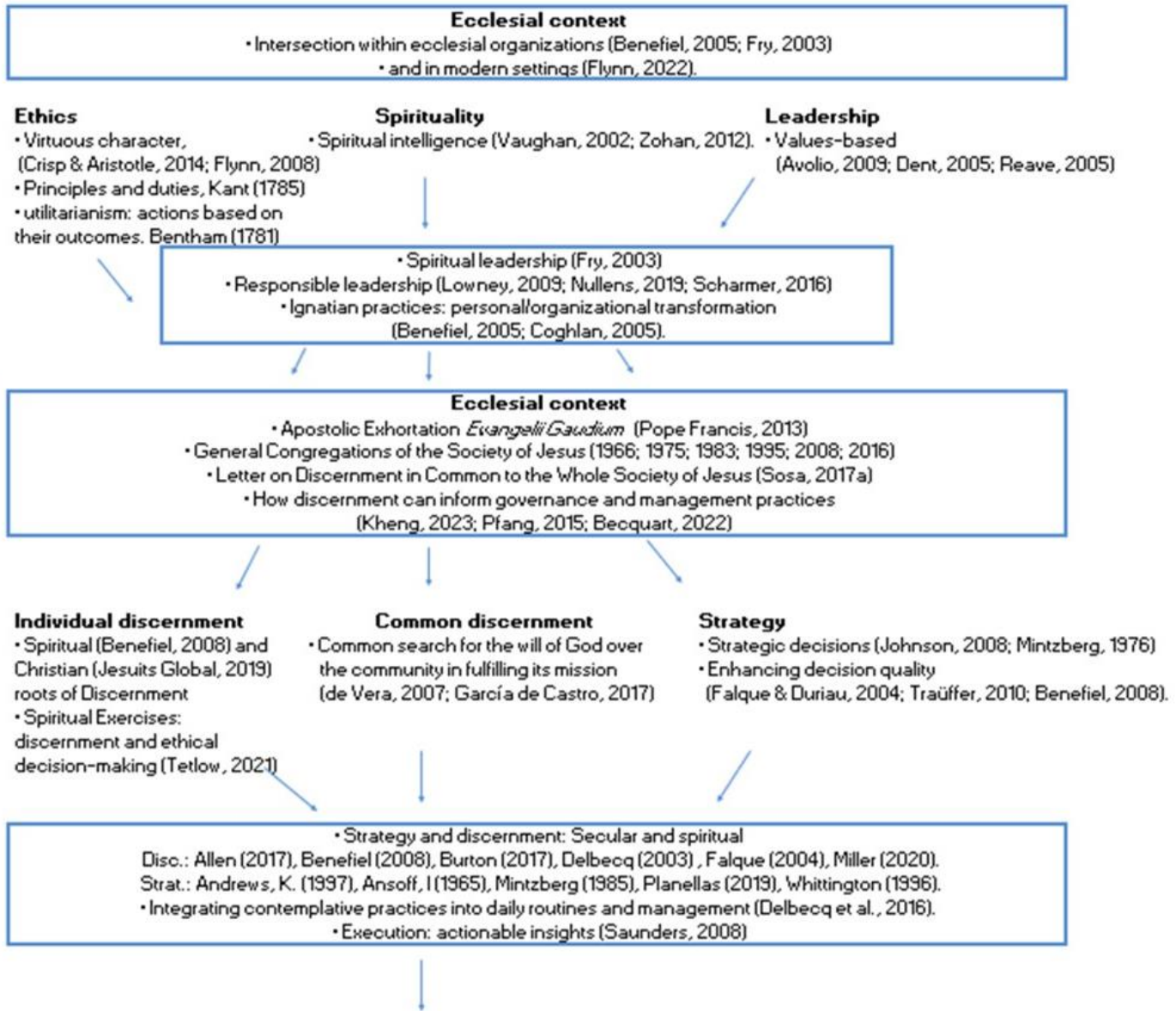
3. Analysis of Collected Data:

It involved 10 participants and 17 semi-structured interviews, analyzed using NVivo software. Employed initial, axial, focused, and theoretical coding (Thornberg & Charmaz, 2014) to identify key themes and patterns.

2.6. Thesis structure

Following the introduction, the Theoretical Framework (figure 1) in Chapter 3 delves into the theoretical underpinnings of DC and its impact on strategic decision-making within ecclesial organizations, focusing on the Society of Jesus. The framework integrates concepts from ethics, spirituality, leadership, and strategic management to build a comprehensive understanding of DC's role.

- Ethics: Explores the cultivation of virtuous character and spiritual intelligence (Crisp & Aristotle, 2014; Kant, 1785; Bentham, 1781; Vaughan, 2002; Zohan, 2012; Flynn, 2008).
- Spirituality: Examines spiritual leadership, responsible leadership, and Ignatian practices for personal and organizational transformation (Fry, 2003; Nullen, 2019; Scharmer, 2016; Lowney, 2009; Benefiel, 2005; Coghlan, 2005).
- Leadership: Investigates values-based leadership (Avolio, 2009; Dent, 2005; Reave, 2005).
- Individual Discernment: Discusses the spiritual and Christian roots of discernment, including the role of Spiritual Exercises in ethical decision-making (Benefiel, 2008; Jesuits Global, 2019; Tetlow, 2021).
- DC: Analyzes the collective search for God's will and its impact on fulfilling the community's mission (de Vera, 2007; García de Castro, 2017).
- Strategy: Addresses strategic decisions, enhancing decision quality, and integrating contemplative practices in daily routines (Johnson, 2008; Mintzberg, 1976; Falque & Duriau, 2004; Traüffer, 2010; Benefiel, 2008).



Source: own elaboration

Figure 1 Theoretical framework

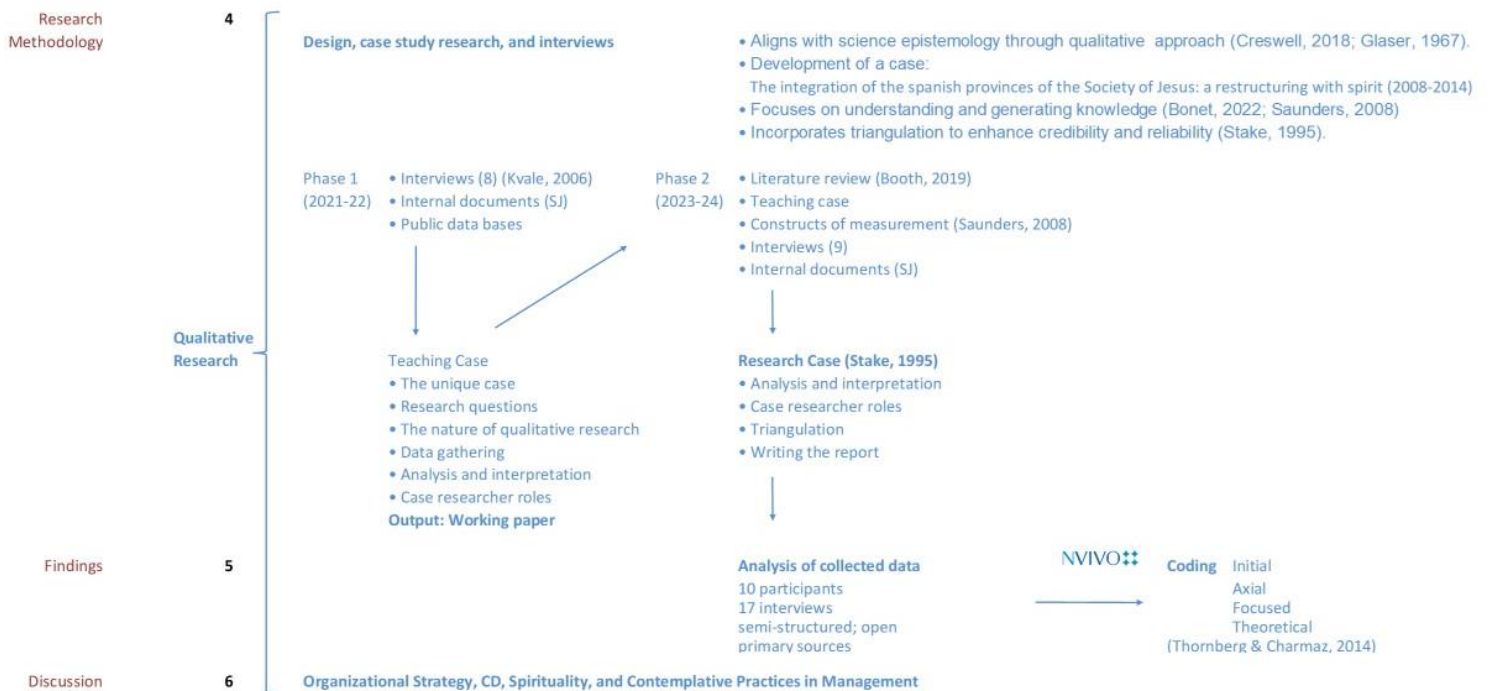
The chapter also places DC within the ecclesial context, referencing key documents like the Apostolic Exhortation *Evangelii Gaudium* (Francis, 2013) and letters from the General Congregations of the Society of Jesus.

Doing so highlights the gap in existing literature regarding the practical application of DC in strategic decision-making, aiming to measure its impact on strategic decisions within ecclesial contexts.

In the sections of the qualitative research (Figure 2 - chapters 4, 5, and 6), we delve into three critical chapters that comprehensively outline our methodology, analysis, and discussion. These chapters are crafted to provide a coherent and thorough understanding of the research process and findings.

Chapter 4 is dedicated to elucidating the research methodology adopted in this study. We employ a case study approach grounded in qualitative epistemology, aligning with Creswell's (2018) and Glaser's (1967) perspectives. This chapter details the development of our primary case study: "The Integration of the Spanish Provinces of the Society of Jesus: A Restructuring with Spirit (2008-2014)." It emphasizes the importance of understanding and generating knowledge, as highlighted by Bonet (2022) and Saunders (2008).

Qualitative Research



Sources: own elaboration

Figure 2 Qualitative research

The methodology incorporates triangulation to enhance credibility and reliability (Stake 1995). The research is divided into two phases: the first includes eight interviews (Kvale 2006) and a comprehensive literature review (Booth 2019) conducted between 2021 and 2022. The second phase, extending into 2023-2024, involves additional interviews, internal documents, and analysis of public databases. This chapter also covers the measurement constructs and ensures a robust framework for data gathering, analysis, and interpretation.

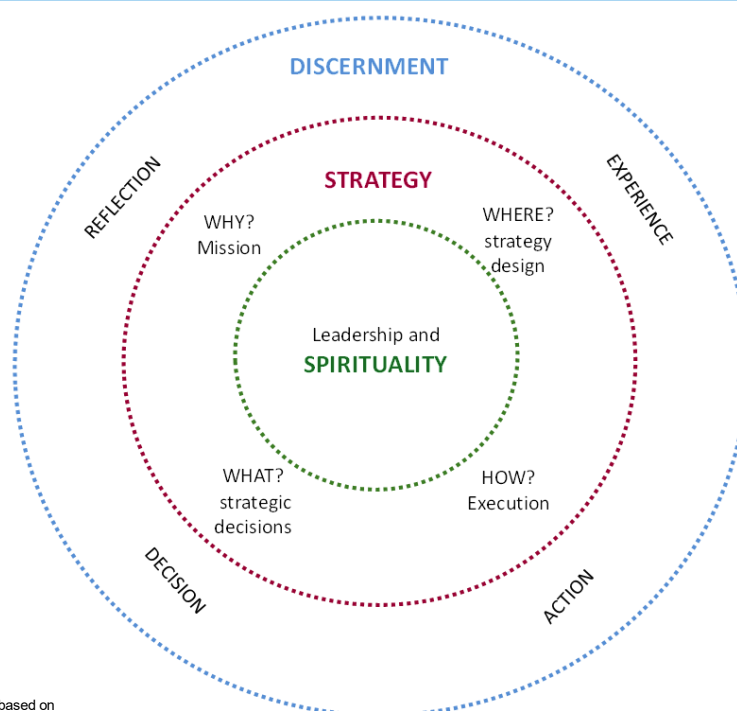
Such analysis of the collected data includes the coding process: initial, axial, focused, and theoretical, based on the methodologies of Thornberg & Charmaz (2014). The analysis draws from 10 initial participants and extends to 17 interviews, utilizing primary sources.

Chapter 5 categorizes and interprets the data, offering a refined understanding of the findings derived from semi-structured and open interviews. For this purpose, the analysis is conducted using Nvivo, a qualitative data analysis software, to ensure a systematic and rigorous examination of the interview data.

The discussion of the research findings in chapter 6 first introduces the relationship between discernment, organizational strategy, and spirituality, followed by the research discoveries relative to DC (García de Castro, 2017) and organizational strategy (Planellas, 2019). There is also a debate about the Impact of DC on Strategic Decisions, in the context of the Integration of provinces of the Society of Jesus in Spain (Saunders, 2008).

Lastly, the focus moves to contemplative practices in management (Delbecq et al., 2016) and how to improve continuous learning, evaluation, adaptation (Falque et al., 2004; Traüffer et al., 2010), and decision-making (Benefiel, 2008).

The circles of Discernment, Strategy, and Spirituality



Sources: own elaboration based on Planellas & Muri (2019), Rambla & Lozano (2019), Tellow (2016).

Figure 3 Discernment, strategy, and spirituality

Such a discussion follows the model "The Circles of Discernment, Strategy, and Spirituality" (Figure 3) as the guiding framework, integrating Saunders' constructs to measure the impact of strategic decisions through execution practices.

The conclusions in chapter 7, outline both theoretical and practical contributions and address the implications of the findings in a broader context, identifying how they contribute to existing knowledge and practice. It also critically examines the study's limitations, discussing the constraints faced during the research and suggesting areas for future inquiry. This balanced perspective ensures that the contributions of the study are clearly articulated while acknowledging the scope for further exploration and refinement.

3. Theoretical framework

3.1. Introduction

This theoretical framework (Figure 4) explores how DC impacts strategic decisions in ecclesial organizations, drawing from a broad range of literature on ethics, spirituality, leadership, discernment, and strategy, all within ecclesial contexts.

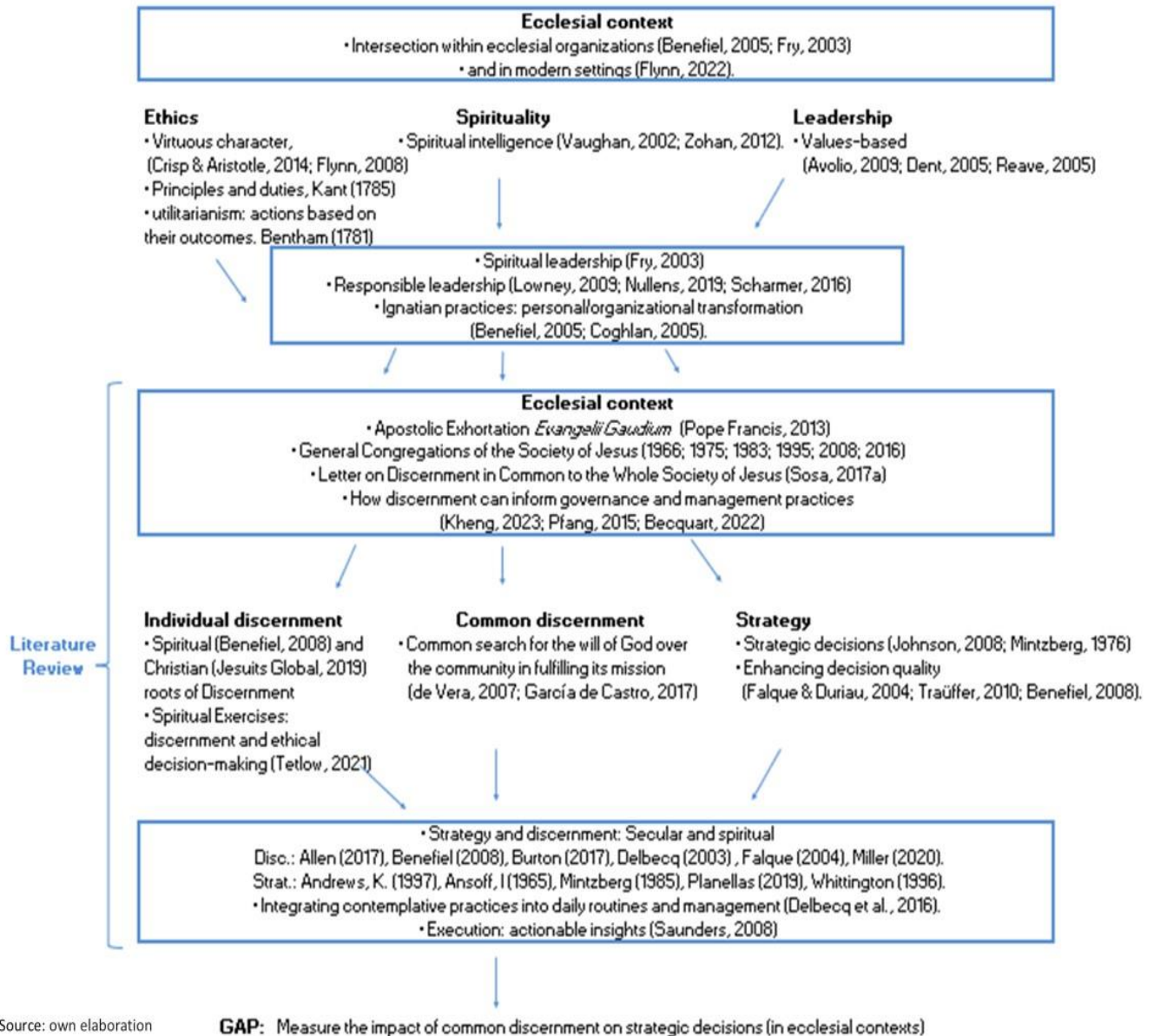


Figure 4 Theoretical framework

Ethics focuses on the cultivation of virtuous character and spiritual intelligence, as discussed by Vaughan (2002), Crisp & Aristotle (2014), Kant (1785), Bentham (1781), and Flynn (2008a). Spirituality is addressed through the lens of spiritual leadership and practices that lead to personal and organizational transformation. Key references include Fry (2003), Lowney (2009), Nullens (2019), Scharmer (2016), Benefiel (2005), and Coghlan (2005).

Leadership is examined through values-based approaches. Avolio (2009), Dent (2005), and Reave (2005) provide insights into how ethical and spiritual values shape effective leadership. The strategy encompasses strategic decision-making and enhancing decision quality, with significant contributions from Johnson (2008), Mintzberg (1976), Falque & Duriau (2004), Trauffer (2010), and Benefiel (2008). Regarding strategy execution, Saunders (2008) underscores the importance of actionable insights via several proposed constructs that measure the impact of strategic decisions.

Our theoretical framework also distinguishes between individual and DC. Individual discernment, rooted in spiritual and Christian traditions, involves ethical decision-making and is informed by Benefiel (2008), Jesuits Global (2019), and Tetlow (2021). On the other hand, DC is about the community seeking God's will collectively, with contributions from de Vera (2007) and García de Castro (2017).

Integrating these themes, the framework examines how secular and spiritual discernment strategies can coexist and reinforce each other. References like Allen (2017), Benefiel (2008), Burton (2017), Delbecq (2003), Falque (2004), and Miller (2020) discuss the integration of contemplative practices into daily routines and management, with actionable insights from Delbecq et al. (2016) and Saunders (2008).

The ecclesial context is crucial for understanding these dynamics. Benefiel (2005), Fry (2003), and Flynn (2022) highlight the intersection of discernment within ecclesial organizations. Documents like Pope Francis's *Evangelii Gaudium* (2013), the General Congregations of the Society of Jesus, and Sosa's (2017) letter on discernment provide foundational ecclesial perspectives. Recent works by Kheng (2023), Pfang (2015), and Becquart (2022) show how discernment informs governance and management practices in ecclesial settings.

The identified gap aims to measure the impact of DC on strategic decisions specifically within these ecclesial contexts, providing a comprehensive understanding of its practical implications.

The following sections will delve deeper into these themes, examining the interplay between ethics, spirituality, leadership, strategy, and discernment in ecclesial decision-making. By exploring both individual and DC practices, the study aims to provide a refined understanding of how these elements influence strategic decisions.

3.1.1. Spirituality, Ethics, and Leadership

Figure 5 illustrates the integration of ethics, spirituality, and leadership within an ecclesial context, emphasizing how these components come together to create a cohesive framework for leadership in religious settings.

Spiritual leadership is essential because it combines the development of virtuous character and spiritual intelligence. According to Fry (2003), spiritual leadership involves inspiring and motivating individuals through values and a sense of calling, which leads to a sense of membership and community within organizations.

Vaughan (2002), Zohan (2012), and Flynn (2008b) highlight the importance of spiritual intelligence in leadership, which encompasses the ability to understand and apply spiritual principles in leadership roles. Vaughan's (2002) approach to spiritual intelligence draws from psychological, spiritual, and transpersonal perspectives, deeply rooted in spirituality and inner transformation. Zohan (2012) integrates cognitive and emotional dimensions to give life purpose and meaning, allowing one to address and solve existential questions and live by deeply

held values, and focusing on the practical applications in everyday life, emphasizing leadership and societal impact.

Fry's (2003) form of leadership is not just about achieving organizational goals but also about fostering personal growth and ethical behavior among followers. This approach emphasizes the development of moral character and virtues. According to Aristotle (Crisp, 2014), ethical reasoning is about becoming a virtuous person by cultivating traits like courage, wisdom, and temperance. This is the fundamental approach used in our research, although there are two other major approaches to ethical reasoning, including Deontological Ethics and Consequentialist Ethics.

Spirituality, ethics, and leadership (in ecclesial context)

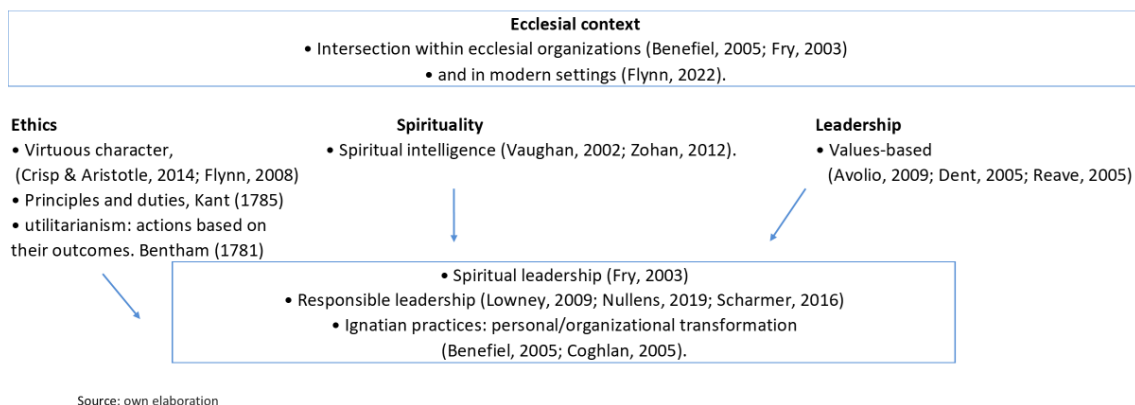


Figure 5 Spirituality, ethics, and leadership

The former, Deontological Ethics, centers on principles and duties. Kant (1785) argued that actions are morally right or wrong based on whether they adhere to universal moral laws, such as his concept of the categorical imperative. This approach focuses on principles like duty, justice, and respect for people, emphasizing that some actions are morally obligatory, regardless of their outcomes.

The latter, Consequentialist Ethics, especially utilitarianism, evaluates actions based on their outcomes. Bentham (1781) advocated that the right action is the one that produces the greatest amount of happiness for the greatest number of people. Utilitarians make ethical decisions based on the balance of positive and negative consequences.

Responsible leadership, as discussed by Nullens (2019), Scharmer (2016), and Lowney (2009), involve leading with a sense of accountability and ethical responsibility. This type of leadership is focused on the well-being of all stakeholders, including the community and the environment. It requires leaders to make decisions that are not only beneficial for the organization but also for society at large. The emphasis on responsible leadership in ecclesial contexts ensures that leaders are guided by strong ethical principles and are committed to serving the greater good.

Ignatian practices, rooted in the spiritual exercises of St. Ignatius of Loyola, are highlighted by Benefiel (2005) and Coghlan (2005) as powerful tools for personal and organizational transformation. These practices involve reflective and contemplative exercises that encourage

leaders to engage in self-awareness, discernment, and ethical decision-making. By incorporating Ignatian practices, leaders can develop a deeper understanding of their values and motivations, leading to more ethical and effective leadership.

Avolio (2009), Dent (2005), and Reave (2005) further contribute to the understanding of leadership by emphasizing the importance of values-based leadership. This approach focuses on aligning leadership actions and decisions with core values and principles. Values-based leadership ensures consistency, integrity, and trustworthiness in leadership practices. It integrates the ethical and spiritual dimensions by emphasizing that leaders must adhere to their values and ethical standards, which enhances their credibility and the trust of their followers.

3.2. Literature Review

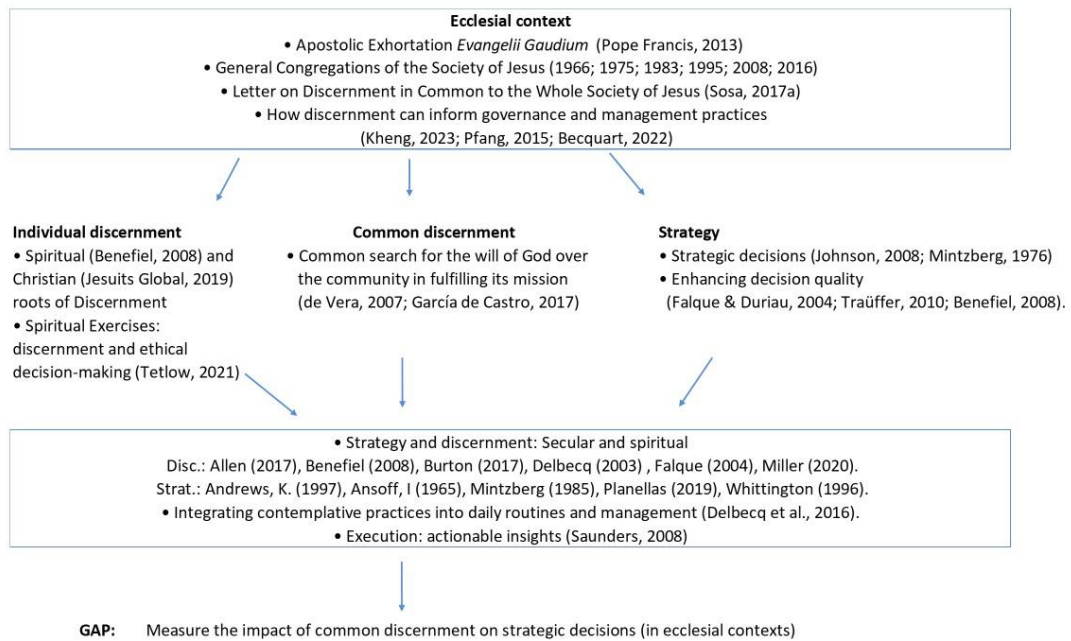
This literature review delves into the integration of individual discernment, DC, and strategy within an ecclesial context. The synthesis of these elements provides a comprehensive framework for ethical and effective leadership in religious settings. In the following pages, the reader will explore how spiritual and ethical principles intersect with strategic decision-making and management practices.

Annex A, Literature Review and Process, offers a comprehensive literature review, meticulously organized into six pivotal topics: Individual Discernment and Reflexive Practice, DC, Leadership, Spirituality, and Ethics, Strategy, Ecclesial, and Qualitative Research. Each section is structured in a tabular format, providing an accessible and systematic overview for the reader. The table is organized into several columns, beginning with a general column, which presents the total order of references across the entire annex. The Category column then arranges references within each of the six sections, ensuring a coherent flow. The Topic column succinctly indicates the type of content, usually with a single word, allowing for quick identification of the subject matter. The Theory of Reference column delves deeper, specifying the aspect or theory discussed within each topic. The Year column records the publication date of each reference, offering a temporal context. The Reference Article column follows, formatted in APA style, providing full citation details for further exploration. Lastly, the Summary column includes the essence of each reference, highlighting key insights and enabling the reader to grasp the core content at a glance.

Figure 6 illustrates how the “Literature review” has been conducted and presented in this chapter. The review begins by examining individual discernment, focusing on both spiritual and Christian roots. This section emphasizes the importance of discernment and ethical decision-making as highlighted by Tetlow (2021). Key contributions from Allen (2017), Benefiel (2008), Burton (2017), Delbecq (2003), Falque (2004), and Miller (2020) discuss the Spiritual Exercises and reflective practices that guide personal and ethical leadership decisions.

Next, the review explores DC, which involves the collective search for the will of God and the community's mission. Insights from de Vera (2007) and García de Castro (2017) illustrate how

Literature review



Source: own elaboration

Figure 6 Literature review

DC enhances communal decision-making processes and mission fulfillment.

As a third aspect, the strategic side of discernment is discussed, highlighting how strategic decisions align organizational goals with ethical and spiritual values. The works of Andrews (1997), Ansoff (1965), Mintzberg (1985), Planellas (2019), and Whittington (1996) provide foundational knowledge on strategic management.

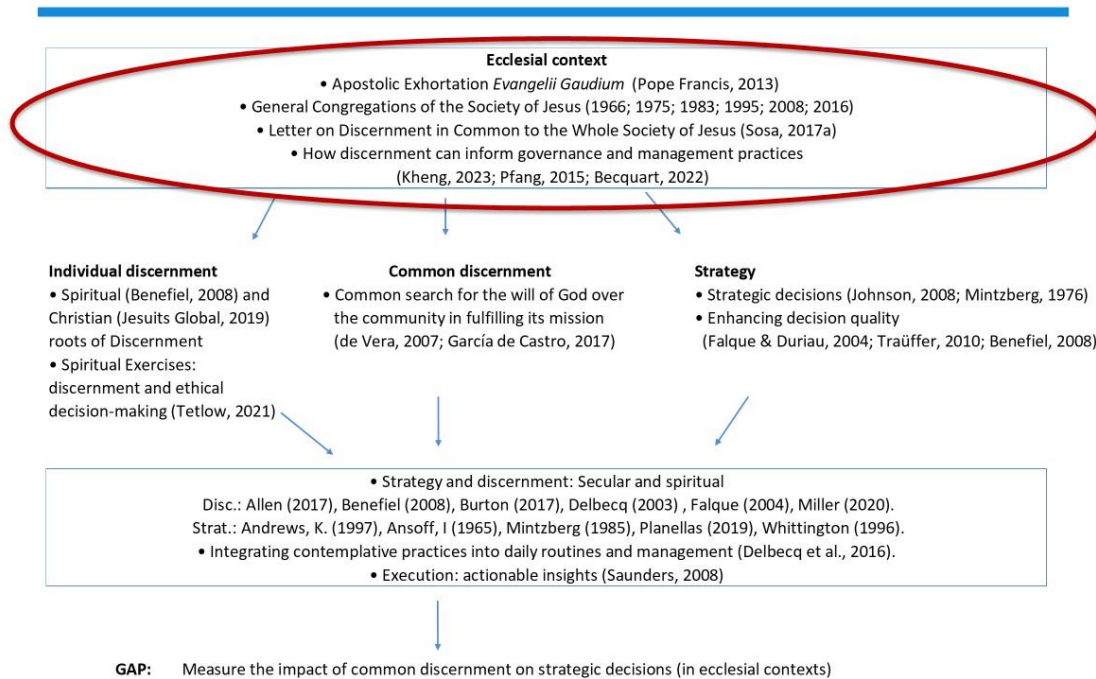
Delbecq et al. (2016) emphasize the significance of incorporating contemplative practices into daily routines and management. This section discusses how these practices, rooted in Ignatian spirituality and other reflective traditions, help leaders maintain ethical integrity and foster personal and organizational transformation.

The importance of actionable insights in executing strategies effectively is covered, with Saunders (2008) focusing on practical applications of discernment and strategic planning to achieve desired outcomes.

Our research focuses on the ecclesial context, see Figure 7, and as such, within ecclesial organizations, these principles take on an even greater significance.

As indicated in the Introduction chapter, Ecclesial describes elements belonging to and emanating from the Roman Catholic Church, including not only the institutional and hierarchical dimensions of the Catholic Church but also the broader community of laypersons, male and female religious orders, and several movements within the Catholic Church (social, spiritual,

Ecclesial context



Source: own elaboration

Figure 7 Ecclesial context

youth, and prayer groups) contributing to the Catholic Church's life and mission (Rahner, 1963) and highlighted in the Second Vatican Council's *Lumen Gentium* (1964)

Documents such as the Apostolic Exhortation "Evangelii Gaudium" ("the joy of the Gospel") by Pope Francis (Francis, 2013), include elements that collectively reflect the essence of spiritual leadership, promoting a leadership style that is deeply rooted in spiritual values and committed to ethical, compassionate, and transformative action.

The exhortation emphasizes the centrality of joy in evangelization, stating that "The joy of the Gospel fills the hearts and lives of all who encounter Jesus" (EG 1). This joy is foundational for the Church's mission, driving it to be more inclusive, merciful, and service-oriented, reaching out to the margins and serving those in need. Francis advocates for addressing economic inequalities and environmental issues, ensuring the Church works actively towards social justice. He highlights 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). This discernment is crucial for understanding and responding to the signs of the times, and it involves both personal and communal reflection in decision-making processes.

Furthermore, various General Congregations of the Society of Jesus (Society of Jesus, 1966, 1975, 1983, 1995, 2008, 2016) emphasize the importance of discernment in leadership and decision-making. Fr. Arturo Sosa SJ's "Letter on DC to the Whole Society of Jesus" (Sosa, 2017a) particularly highlights the role of collective spiritual discernment in guiding strategic decisions:

“Two great challenges proposed to us by the 36th General Congregation are 1) discerning the consequences of formulating the Society’s mission as a contribution to reconciliation and 2) choosing universal apostolic preferences at this particular moment in history for the world and the Society. These challenges demand that we, and our mission partners, improve our ability to discern in common. There are other areas in which we are invited to grow in our capacity for DC, among others, constituting ourselves as an intercultural body, deepening our dialogue with other cultures and religions, and promoting a culture of protection for children, young people, and vulnerable persons.

The 36th General Congregation confirmed that DC is inherent to the way of proceeding of the Society of Jesus. The image of the first companions in Venice (1537) highlights the capacity they acquired of deliberating in common, led by the light of the Holy Spirit, even though they were such a culturally diverse group.¹ Nevertheless, they all had an active spiritual life, characterized by their having fallen in love with Christ in the Spiritual Exercises, by their service to the poor, and by their availability to be sent by the Church to any place where the need was greater.”

The ecclesial discourse on discernment has increasingly been applied to organizational governance and management, reflecting the integration of spiritual principles into these domains. Scholarly inquiries have explored how the Catholic Church's traditions of discernment can inform effective governance and management practices. (Kheng, 2015; Pfang, 2015)

In her “What Are They Saying About Church Management? Patterns, Problems, and Considerations for Proceeding” Kheng (2019) examines how ecclesial discernment practices can enhance corporate governance within the Catholic Church. By incorporating discernment into decision-making processes, church leaders can ensure that their actions align with spiritual values and ethical standards. This integration can lead to more transparent, accountable, and morally responsible governance structures.

Similarly, Raymond Pfang (2015) in “Management in the Catholic Church: Corporate Governance” highlights the role of discernment in church management. He argues that discernment can help church leaders navigate complex organizational challenges by fostering a deeper understanding of their mission and purpose. This process involves not only individual reflection but also collective dialogue, enabling leaders to make decisions that reflect the broader community's needs and values.

The integration of ecclesial discernment into organizational governance and management represents a significant development in the application of spiritual principles to leadership. The insights from scholars like Kheng (2019) and Pfang (2015) demonstrate the potential for discernment to transform governance practices within the Catholic Church and beyond, fostering a more ethical, accountable, and community-focused approach to organizational leadership.

The application of discernment to organizational governance extends beyond the church to secular organizations as well. The principles of discernment—such as ethical integrity,

community involvement, and a focus on the common good—can enhance corporate governance by promoting a more inclusive and morally conscious approach to leadership. Organizations that adopt these principles can benefit from improved stakeholder trust, better decision-making processes, and a stronger alignment with their core values and mission. (Delbecq et al., 2003a)

3.2.1. Discernment

Spiritual roots of discernment

The Latin word *discernere*, to “separate” or “to distinguish” or “to sift through”, is the origin of the English word discernment. (Flynn, 2022)

The concept of discernment traces its origins to various sources, as noted by Margaret Benefiel (2008) in her article “Using Discernment to make better business decisions”. While it has been predominantly expounded within the Christian tradition, discernment also finds resonance in other spiritual lineages dating back to ancient times. Figure 8 illustrates the “Spiritual roots of discernment” spanning different spiritual traditions.

Across various cultural and spiritual traditions, analogous processes akin to Christian discernment aim to achieve similar objectives. The Sioux tradition articulates a desire to “see everything,” symbolizing a profound insight that transcends physical sight. (Wilson, 1991) Many African traditions emphasize DC through the philosophy of *Ubuntu*, which focuses on interconnectedness and collective wisdom. Decisions are made considering the well-being of the community and harmony with nature. (Tutu, 2009)

In Hinduism, discernment is central to *Jnana Yoga*, the path of knowledge. Practitioners engage in deep contemplation and study to distinguish between the real (Brahman) and the unreal (Maya), seeking ultimate truth and liberation. (Tapasyananda, 1987)

The concept of *Wu Wei* in Taoism, linked to discernment, means non-action or effortless action. This involves aligning one's actions with the natural flow of the universe and making decisions that are harmonious and balanced. (Tzu, 1963)

Spiritual roots of discernment - Universal human quest for clarity, wisdom, and truth

Timeline	Spiritual traditions	Christian tradition
	Analogous Processes	
ancient	<ul style="list-style-type: none"> - Sioux Tradition: "See everything" (Wilson, 1991) - African Traditions: <i>Ubuntu</i> - Communal discernment, interconnectedness, and collective wisdom (Tutu, 2009) 	
16 th BCE	<ul style="list-style-type: none"> - Hinduism: <i>Jnana Yoga</i> - Distinguishing between the real and unreal through deep contemplation (Tapasyananda, 1987) - Taoism: <i>Wu Wei</i> - Non-action or effortless action, aligning with the universe (Tzu, 1963) - Confucianism: <i>Ren and Li</i> - Moral rectitude and social harmony (Watson, 2007) 	
6 th BCE	<ul style="list-style-type: none"> - Buddhist and Yogic Practices: "Seeing things just as they are" (Tejadhhammo Bhikku, 2003) - Judaism: <i>Chochmah</i> - Critical thinking and ethical decision-making in Rabbinic literature (Bokser, 1951) 	
4 th BCE		Historical Foundations <ul style="list-style-type: none"> - Aristotle's Framework (Crisp & Aristotle, 2014) <ul style="list-style-type: none"> - Finality: Ultimate aims such as the common good, virtue, and happiness - Means: Deliberative process of choosing methods to achieve these aims
1 st CE		<ul style="list-style-type: none"> - Christian Tradition: Deeply rooted in spiritual practices
8 th CE	<ul style="list-style-type: none"> - Sufi Tradition: "Revealing truth" (Al-Jerrahi, 2003) 	

Source: own elaboration based on Benefiel, M. (2008). Using discernment to make better business decisions. *Leadership and business ethics* (pp. 31-38). Springer.

Figure 8 Spiritual roots of discernment

Confucian discernment involves the concepts of "Ren" (humaneness) and "Li" (ritual propriety). It emphasizes moral rectitude and social harmony, guiding individuals to make decisions that reflect virtue and respect for societal norms. (Watson, 2007)

In Buddhist and yogic practices, the goal is often described as "seeing things just as they are," emphasizing a clear perception of reality (Bhikku, 2003). Within the Sufi tradition, the concept of discernment is framed as "revealing truth," highlighting the pursuit of uncovering deeper insights and understanding (Al-Jerrahi, 2003). These parallels underscore the universal human quest for clarity, wisdom, and truth across diverse cultural and spiritual contexts.

In Judaism, discernment is a key aspect of wisdom ("*chochmah*"). Rabbinic literature, such as the Talmud (Bokser, 1951), encourages critical thinking, ethical decision-making, and understanding of the divine will through study and discussion.

Notably, Aristotle, whose philosophical insights continue to influence contemporary thought, outlined fundamental components of decision-making (Crisp, 2014). Aristotle's framework encompasses two key elements: Finality pertains to the ultimate aims of human existence, such as the pursuit of the common good, personal virtue, and happiness, serving as the overarching goals that guide human actions and choices. These goals involve the deliberative process of

considering various methods or approaches to achieving these ultimate aims. This deliberation entails weighing different means and strategies in light of their potential to fulfill the desired ends, ensuring that the chosen methods effectively contribute to the pursuit of the common good, personal virtue, and overall happiness.

All these traditions highlight the universal importance of discernment in guiding ethical, spiritual, and communal decisions, demonstrating its relevance across diverse cultural and religious contexts.

The roots of discernment are also found in the Jewish scriptures and tradition. In the Biblical view, the end of humans translates into knowing the will of God and doing it (both desirable and possible). Early Christians built on Aristotle, the Hebrew scriptures, and the New Testament as they began to articulate their understanding of discernment, urging believers to listen to God and do God's will.

Saint Paul the Apostle, born about the same time as Jesus of Nazareth, 4 BCE, died circa 62–64 CE, one of the leaders of the first generation of Christians, often considered to be the most important person after Jesus of Nazareth in the history of Christianity, advised his early converts “to discern the will of God and to know what is good and acceptable and perfect” (NABRE, 2011) More than 1500 years later, Saint Ignatius of Loyola (d. 1556), one of the most influential figures in the Roman Catholic Counter-Reformation in the 16th century and founder of the Society of Jesus (Jesuits) in Rome in 1539 (with the approval of Pope Paul III in 1540 when promulgating the bull “*Regimini militantis Ecclesiae*”), started a tradition with its emphasis on discernment, with great potential to understand and adapt to the challenges facing the modern Church and the world (Jesuits Global, 2019), that is to discern the “signs of the times” - the dual dynamism of going back to our spiritual roots and opening our minds and hearts to the Lord's working in today's new world.

He wrote a significant contribution to Christian spirituality, a methodology of discernment: the Spiritual Exercises, first published in 1548 - not a full-fledged ‘theory’ or abstract model but some practical principles with an imaginative expression of their dynamics to help people develop their attentiveness, their openness, and their responsiveness to God. The Spiritual Exercises (De Loyola, 1985) can be understood in two distinct yet complementary ways. Firstly, they are a collection of meditations, prayers, and contemplative practices, meticulously compiled to serve as a handbook. This handbook is particularly useful for spiritual directors who accompany and guide individuals through a profound process of reflection and prayer. Secondly, these exercises emphasize the idea that stretching oneself spiritually is as essential as an athlete's rigorous conditioning routine. This approach underscores the importance of spiritual growth and discipline.

The Spiritual Exercises of Ignatius Loyola offer a roadmap for discernment and ethical decision-making through contemplative practices, and help individuals cultivate a deeper connection to divine wisdom, guiding ethical action and fostering organizational integrity (Tetlow, 2021).

This remarkable treatise became the most influential work on Christian discernment. Its impact on the tradition of spiritual guidance is unparalleled, although other Christian groups, such as the Carmelites and Quakers, have also developed their strong traditions of discernment. The Spiritual Exercises, however, remain a cornerstone in the practice of guiding individuals toward deeper spiritual awareness and commitment.

The focus of this research, particularly in the realm of discernment, is fundamentally rooted in the rich Ignatian tradition. However, it is not confined solely to these principles, allowing for a broader exploration of diverse perspectives and practices.

3.2.2. Individual Discernment

The narrative of individual discernment begins in the 1530s with St. Ignatius Loyola, who deeply moved by scripture, documented his reflections on the emotions they stirred within him. These musings eventually crystallized into the Spiritual Exercises of St. Ignatius Loyola, a guide aimed at deepening one's spiritual life, initially published in 1548. Over time, these Exercises gained recognition as a profound tool for personal growth and discernment. The original manuscript of these exercises became a revered document, encapsulating Ignatius' insights into the human psyche and the discernment of spirits. (de Dalmases, 1990)

The Spiritual Exercises of Ignatius Loyola, offer a roadmap for discernment and ethical decision-making through contemplative practices, and help individuals cultivate a deeper connection to divine wisdom, guiding ethical action and fostering organizational integrity (Tetlow, 2021).

Discernment transcends major life decisions, infiltrating everyday choices, and entails a dynamic interplay of intellect, emotions, and actions, shaping the behaviors and values of individuals, families, organizations, and even nations. (Tetlow, 2016)

In contemporary times, contemplative practices like those delineated in the Spiritual Exercises are acknowledged for their benefits beyond religious spheres. Integrating contemplative practices into daily routines and management has exhibited advantages such as heightened focus, diminished irritability, and enhanced receptivity to others' perspectives. (Delbecq et al., 2016)

Within the realm of business, spiritual discernment is increasingly esteemed as a valuable instrument for making ethical and effective decisions. (Benefiel, 2008)

Leaders who engage in discernment are better equipped to navigate intricate ethical dilemmas, drawing upon courage, intuition, and faith as operationalized by the Developmental Process of Intuition (DPI). (Trauffer et al., 2010)

At its essence, discernment involves uncovering factors that either bolster or challenge established judgments, empowering individuals to decide more autonomously and take accountability for their actions. It encompasses behavioral components such as knowledge acquisition, application, and self-regulation. (Trauffer et al., 2010)

In management, discernment proves indispensable for making informed decisions amidst the complexities of experiences (de Jongh, 2017). Furthermore, it serves as a conduit between self-awareness and morally responsible leadership (Nullens, 2019), fostering authentic leadership grounded in an awareness of societal significance and receptivity to the future, as postulated by Theory-U (Scharmer, 2016).

Individual discernment fundamentally represents a way of existence (General Curia, 2020). It involves recognizing the Holy Spirit's influence in our lives and the world around us. It entails discerning where the Spirit is guiding us and learning how to follow that direction.

Ignatius of Loyola, in his Spiritual Exercises (de Dalmases, 1990), termed it "Motions of the soul" or Discernment of Spirits. It is an internal disposition grounded in an act of faith, founded on the belief that God is at work in life's events and in the people we encounter and who speak to us.

These internal movements encompass desires, feelings, thoughts, imaginings, emotions, repulsions, and attractions. Discernment of spirits involves cultivating sensitivity to these mental movements, reflecting upon them, and comprehending their origins and objectives. Spirits may include the Holy Spirit and the adversary of our human nature, as well as influences from other internal and external sources. (Nullens, 2019)

Individual discernment transcends mere slogans, organizational techniques, or trends of Pope Francis' pontificate; it is about struggling with questions and dilemmas. Pope Francis has consistently emphasized the significance of spiritual discernment for the Church as a whole, urging the Society of Jesus to advocate for discernment across all facets of ecclesial life. (Francis, 2018)

In essence, discernment involves interpreting ("head") the motivations ("heart") behind a decision ("hands") (Tetlow, 2016), and the ensuing action to challenge the prevailing norms in pursuit of what is good, acceptable, and perfect (NABRE, 2011)

3.2.3. Discernment in Common

DC extends beyond religious contexts, finding resonance in managerial settings. Within organizations, discernment serves as a structured process that invokes both rationality and spirituality to enhance decision quality. (Falque et al., 2004; Trauffer et al., 2010)

Moreover, the reflexive practice has emerged as a complementary perspective, promoting inclusive and equitable ways of managing and organizing by embracing the unknown as a core aspect. (Allen, 2017)

Quaker business methods offer another example of how spiritual discernment can be incorporated into corporate decision-making and management practice, enriching the decision-making process with spiritual insights. (Burton, 2016; Miller, K., 2020a)

The journey of DC within the Society of Jesus spans centuries and is deeply rooted in the organization's commitment to spiritual growth and its Jesuit identity. From the onset, effective communication, cooperation, and mutual understanding have been recognized as foundational elements in fostering DC. (Dhôtel, 1970)

Over time, this understanding evolved, emphasizing the importance of open communication, active listening, and a shared focus on common goals among Jesuit communities (Futrell, 1972). General Congregation (GC) 32 (Society of Jesus, 1975) played a pivotal role in encouraging communities to embrace DC, recognizing it as a critical component of both spiritual growth and Jesuit identity (Arrupe, 1982; Barry, 1987).

DC, as outlined in GC 32 and subsequent congregations, involves various factors such as the dispositions of the discerners, the context for discernment, and the matter to be discerned. (Nicolás, 2009)

The Society of Jesus' dedication further underscored this commitment to incessantly searching for the signs of the times within the Church and beyond (Kolvenbach, 1986).

Workshops and support initiatives have been established to aid those who accompany and guide the search for the will of God in the community, highlighting the importance of nurturing this practice within Jesuit circles. The momentum gained from GC 32 continued to thrive, with GC 36 (Society of Jesus, 2016) providing further impetus to the practice of DC (Pérez, 2018; Sosa, 2017a).

According to Fr. P. H. Kolvenbach SJ, Superior General of the Society of Jesus (1983-2008), DC refers to the shared pursuit of understanding God's will, knowing his desires and his purpose for the local community in fulfilling its mission. (de Vera, 2007)

The DC is, in the opinion of Fr. Adolfo Nicolás SJ, former Superior General of the Society of Jesus (2008-2016), a slow process; slow and real. There is no instant insight. As Saint Ignatius said, it is true that in some cases, we receive a sudden light, as happened to Saint Paul on the road to Damascus. However discernment is different, its nature is search, and search is a process that takes time (Nicolás, 2009). It is characterized by several key principles, accentuating the importance of consultation and communal processes. (Nicolás, 2009)

Firstly, discernment is portrayed as the guiding approach to navigating the intricacies of a changing world. Nicolás (2009) underscores the communal nature of discernment, asserting that no individual possesses the capacity to comprehensively grasp or control every aspect of existence. Moreover, Nicolás (2009) suggests that God's will surpasses human comprehension and cannot be fully encapsulated by any individual or group.

During the discernment process, Nicolás (2009) emphasizes the acknowledgment that humans can never entirely apprehend God's will. Instead, discernment involves approaching decisions with humility and openness, recognizing the limitations of human understanding. Nicolás (2009) underscores the significance of prayer, consensus-building, and meticulous consideration of available data and convictions in discerning God's will within the context of contemporary circumstances.

Furthermore, Nicolás (2009) accentuates the dynamic nature of discernment, as articulated by Saint Ignatius. Even after arriving at a decision based on the best available information and collective discernment, Nicolás (2009) proposes that individuals must remain receptive to reconsideration in light of new insights or revelations. This perspective underscores the notion that God's will transcends human limitations, necessitating an ongoing readiness to reassess and adapt decisions in response to evolving circumstances.

Overall, Nicolás's delineation of discernment provides a comprehensive framework underscoring the importance of community, humility, and adaptability in navigating the complexities of decision-making within the context of divine guidance.

García de Castro (2017) describes the DC process as a structured approach where communal and personal reflection times alternate to achieve collective decision-making. The process integrates community discussions with personal reflections, ensuring comprehensive discernment. Annex E illustrates a graphical representation of the process, including a step-by-step breakdown between community and personal time.

The Parallel Processes approach facilitates a dynamic interplay between community discussions and personal reflections, where each communal step is followed by individual time for deeper personal discernment, ensuring that each member's insights inform collective decisions. This process integrates both emotional aspects, such as consolation and desolation, and rational aspects, including reasons for and against, to foster holistic decision-making. An iterative feedback loop between communal and personal stages ensures alignment and thorough consideration, enhancing the decision-making process before finalization.

The role of conversation and social interaction in DC distinguishes it from personal or individual discernment. Both forms of discernment use the felt movements of consolation and desolation

to discern the presence, activity, and will of God. Personal discernment looks within to personal interiority for these movements, whilst DC presupposes personal prayer and discernment, it also looks at the movements of consolation and desolation in the interactions within a group, and in the qualities of these interactions (Jesuits of Canada, 2020).

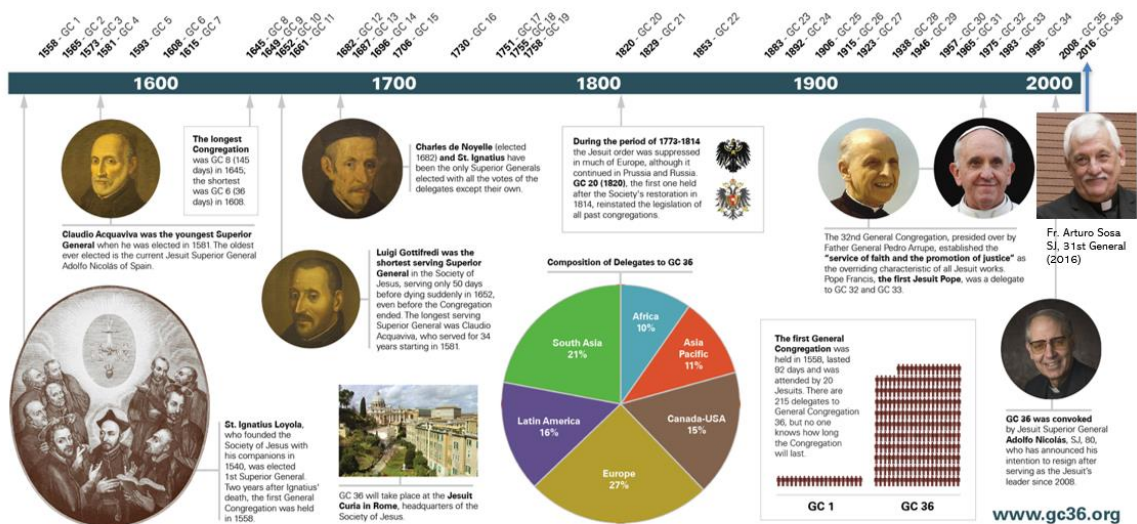
In a letter to the whole Society of Jesus, Fr. Superior General Arturo Sosa SJ (Sosa, 2017b), described the properties of DC, which are present in different degrees, depending on the circumstances in which the discernment is done following traditional Ignatian criteria, taking into account the persons, the times, and the places. As far as the DC process works, Annex E illustrates detailed descriptions from preparation to confirmation and eventual documentation of the decision made (García de Castro, 2017).

Furthermore, the DC is the prior condition for apostolic planning at all levels of the Society of Jesus' organizational structure. Thus, DC and apostolic planning work in tandem to ensure that decisions are made in the light of the experience of God and that these decisions are put into practice in such a way that they realize the will of God with evangelical effectiveness (Sosa, 2017b).

3.2.4. DC in General Congregations (GC)

The General Congregation serves as the paramount governing body of the Society of Jesus, convened upon the death or resignation of a Superior General to elect his successor and enact legislative changes within the organization. The first GC was held after two years of Ignatius

SJ General Congregations: from 1558 (GC 1) to 2016 (GC 36) – 458 years apart



Source: own elaboration based on gc36.org

Figure 9 GC of the Society of Jesus

Loyola's death, in 1558. The most recent GC, number 36, elected Fr. A. Sosa SJ as the 31st superior general of the order in 2016. In Figure 9 there is a depiction of some of the highlights of this 458-year-old tradition.

The ordinary direction and control of the Jesuit order lie with the Superior General, elected for life, and those he appoints for limited terms as Superiors. Governed by Church law, the Superior General adheres to the Constitutions and legislation of the Jesuit order. (The Jesuit Curia in Rome, 2016)

Over the past half-century, five General Congregations have been convened for the election of a new Superior General or to address significant issues requiring collective decision-making. Beginning in 1975 until 2016, each General Congregation has had specific thematic focuses, and decrees related to DC have been addressed during these General Congregations, underscoring the significance of collective discernment in the governance and decision-making processes of the Society of Jesus. (García de Castro, 2016)

Throughout these GCs, DC emerged as a core aspect of Jesuit spirituality, guiding decision-making processes, fostering collaboration, and ensuring fidelity to the mission. It reflects a dynamic evolution of Ignatian spirituality, adapting to contemporary challenges while remaining rooted in tradition.

GC 31 (1965-66): Emphasized personal prayer and initiated a profound renewal of community life within the Society of Jesus (Society of Jesus, 1966). Under Fr. Pedro Arrupe SJ, this GC emphasized spiritual formation, obedience, and community life as integral to DC. Subsequent GCs further elaborated on these themes, integrating the practice into the fabric of Jesuit life.

GC 32 (1974-75): Focused on "The Service of Faith and the Promotion of Justice", highlighting the integral role of social justice in the Jesuit mission (Society of Jesus, 1975). Following the guidance of Fr. Arrupe SJ, it highlighted the Jesuit community as a community of discernment, stressing the importance of discerning together in missions. It underscored the need for reflection and examination inspired by Ignatian tradition, fostering a culture of participative reflection and evaluation.

GC 33 (1983): Themed "Companions of Jesus Sent into Today's World", aimed at reaffirming Jesuit commitment to engaging with contemporary challenges (Society of Jesus, 1983). Led by Fr. P. H. Kolvenbach SJ, DC was defined as the characteristic way of proceeding for Jesuits. It emphasized the necessity of faithful practice of apostolic DC rooted in Ignatian spirituality and the Constitutions.

GC 34 (1995): Centered on "Servants of Christ's Mission", emphasizing Jesuit dedication to serving the mission of Christ in the world (Society of Jesus, 1995). It emphasized poverty as an essential topic for DC, urging communities to reflect on their lifestyle choices and commit to living simply and in solidarity. Fr. P. H. Kolvenbach SJ further stressed the importance of participating in prayer and shared rest towards a more evangelical lifestyle.

GC 35 (2008): Characterized by the theme "With Renewed Vigor and Zeal", focusing on revitalizing Jesuit spirituality and apostolic zeal (Society of Jesus, 2008). Under Fr. Adolfo Nicolás SJ, GC 35 (2008) issued decrees on identity, challenges for mission, obedience, governance, and collaboration. It emphasized communal exercise of discernment, considering multiple voices but ultimately conferring mission by the superior. Fr. Nicolás SJ reflected on the significance of DC in addressing contemporary challenges and fostering Ignatian spirituality.

GC 36 (2016): Focused on "Companions in a Mission of Reconciliation and Justice", highlighting the importance of reconciliation and social justice in the Jesuit mission (Society of Jesus, 2016). Fr. Arturo Sosa SJ was named a General Councilor for Discernment and Apostolic Planning,

signaling a heightened focus on discernment within the Society. It highlighted the role of the community as a privileged place for apostolic discernment, emphasizing the importance of spiritual conversation and Pope Francis' endorsement of discernment in various aspects of Christian life.

From 1965 to 2016, fifty-one years apart, DC has been present in all six GCs, under the form of decrees (see figure 10). In GC31, DC was seen as a spiritual formation, carried out in fraternal meetings, seeking the common search for the divine will. Ten years later, GC32 referred to DC as participating in reflection, seeking at all costs the will of God over the community. GC33 highlighted that if Jesuits wanted to fulfill their mission, their reason of being, they should faithfully practice the apostolic DC, qualified as characteristic of their way of proceeding. GC 34 and 35 stress the importance of poverty and obedience, and DC as their lifestyle. Fifty-one years after GC31, GC36 added a new tool to animate apostolic communal discernment, that is the spiritual conversation.

Evolution of DC in GCs of the Society of Jesus: from 1965 (GC 31) to 2016 (GC 36) – 51 years apart

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

Source: own elaboration based on García de Castro (2017)

Figure 10 Evolution of CD in GCs of the Society of Jesus

GC 31 (1965, Fr. Pedro Arrupe SJ): fraternal meetings as the base of spiritual formation

From GC 31, 1965-66, we point out three decrees (D) where DC comes into play with a significant role (García de Castro, 2016) - the 56 total decrees fall into multiple categories including introductory decrees, the Institute, the formation of the Jesuits, religious life, the apostolate, congregations, government, and a general appendix.

- D8: Spiritual formation: common search of the divine
- D17: Obedience: to find the will of God more easily.
- D19: Community life: participation of all the members in the consultation process

D8: Spiritual formation of the Jesuit

Nr. 5: "...Likewise, fraternal meetings, which insofar as they seek the common search for the divine will, will bring spiritual joy, strength, and apostolic fruitfulness to all."

D17: Obedience

Nr. 6: "To find the will of God more easily, may the Superior have people of advice with him and consult them frequently. Also, ask specialists when complex matters must be decided... Furthermore, since all those who work together in the divine service are under the influence of the grace of the Holy Spirit, it is convenient to exchange ideas and seek advice from everyone to better understand the divine will. The Superiors should easily and frequently ask their brothers for advice and listen to them separately in groups and even all together according to the character and importance of the matter... The obligation of the Superior to personally decide and order what must be done remains intact"

D19: Community life and religious discipline

Nr. 5: "...more specifically, the following are increasingly necessary for community life in the company: c) consultations in which specialists are asked for advice through frequent meetings and the active participation of everyone in the consultation process is encouraged. Coordination and promotion of the apostolate and in other points related to the common good."

GC 32 (1975): participated reflection for the union of minds

From the following GC 32 (1974-75), we point out three decrees (D) where DC is of the essence related to the role of Jesuits, their mission, and their community's way of proceeding. The fifty-six decrees of the 32nd GC largely fall into five categories: an introductory decree, the Society's response to challenges of that age, the development of the Society's apostolic body, witness to the Gospel in those circumstances, and congregations and government.

- D2: Jesuits today: the Jesuit community is also a community of discernment.
- D4: Our mission today: a process of reflection and examination inspired by the Ignatian tradition of spiritual discernment.
- D11: The union of minds: corporate search for the will of God from a participated reflection

D2: Jesuits today

Nr. 19: "The Jesuit community is also a community of discernment. The missions, to which Jesuits are sent individually or in groups, are not exempt from discerning together the way and means of carrying out these missions. This is why we open our minds and hearts to our superiors, in turn, they become part of the discernment of our communities, always in the common understanding that the final decisions rest with those who carry the weight of authority."

D4: Our mission today

Nr. 72: "This is not a simple survey but rather a process of reflection and examination inspired by the Ignatian tradition of spiritual discernment. Prayer and the effort of indifference and apostolic availability must display all the strength that corresponds to them.

Nr. 77: "In each province or region or Assistance there must be a precise mechanism for evaluation and review of the ministries. It is necessary to review the effectiveness of these existing mechanisms, and if necessary, replace them with better-adapted ones that ensure broader participation in a DC."

D11: The union of minds

Nr. 21 “The spiritual exchange of the community may, in peculiar circumstances, take the form of ‘spiritual discretion in common.’ This is something very different from the usual community dialogue since it is described as the corporate search for the will of God from a participated reflection on the signs capable of pointing to where the Spirit of Christ points and the method to follow in this community discernment is analogous. to the one proposed by Saint Ignatius to make a personal decision on matters of importance [EE 169-189].”

Nr. 22: “Some requirements are presupposed as a basis for DC: on the part of the members of the community a certain familiarity with the Rules of Saint Ignatius on the discretion of Spirits; a resolute determination to seek at all costs the will of God over the community and, in general, all those dispositions of mind and heart typical of the First and Second weeks of the Exercises. On the part of the community as such, the clear definition of the matter to be discerned, sufficient information about it, and the possibility of communicating to others what each one sincerely thinks or feels.”

Nr. 24: “What role does the Superior have in Community Discernment? It must first promote, as far as possible, the required provisions; second, indicate the call of the community and define the matter of discernment; third, take an active part in it as a link of union within the community and with the entire Company and, finally, to determine the final decision in the light, yes, of the discernment made, but freely, since he, as Superior, is He has entrusted the charisma and the burden of authority. Because the discerning community is not, in our Company, a deliberative or capitular body, but only a consultative one, whose function, well understood and fully accepted, consists of helping the Superior so that he can determine what can be done for the greater glory of God and service. Men's”.

Nr. 50: “Let the Superiors try, as far as possible, to build an Ignatian apostolic community in which the multiple forms of trusting and friendly spiritual communication can be lived. If it is about things of importance, and the requirements are met, it is advisable to use spiritual discretion in common, as a peculiar channel to investigate the will of God.”

GC 33 (1983, Fr. P. H. Kolvenbach SJ): DC as the way of proceeding

In the GC 33 (1983), DC was defined as a way of proceeding whilst reviewing the apostolic mission.

D1: Companions of Jesus sent to the world today: DC as the way of proceeding.

Nr. 39: “If we want to fulfill our mission, we must faithfully practice the apostolic community discernment that is characteristic of our way of proceeding and springs from the Exercises and the Constitutions. By this our way of proceeding we have to review all our ministries, both traditional and modern.”

Nr. 42: “But our apostolic mission cannot be clarified with definitions alone. We will only arrive at full clarification if we are faithful to spiritual and apostolic discernment carried out correctly, with the required conditions...”

GC 34 (1995): poverty, an important topic for DC

GC34 (1995) highlighted poverty (D9), i.e., lifestyle, as an important topic for DC.

D9: Poverty

Nr. 12b: “An important topic for community discernment should be our lifestyle. What is required is that the community make a common plan that reflects its desire to live simply and in solidarity, a plan that can be easily evaluated at regular intervals.”

Fr. P. H. Kolvenbach SJ in a letter to the entire Society of Jesus (Kolvenbach, 1998), noted progress in participated prayer, in common apostolic discernment (NC 326,3), in shared rest towards a more evangelical lifestyle and a more explicit apostolic lifestyle.

GC 35 (2008, Fr. Adolfo Nicolás SJ): obedience, a topic for discernment as a communal exercise

GC 35 issued decrees on the following subjects:

1. Identity: A Fire that Kindles Other Fires. Rediscovering our Charism.
2. Challenges for our mission today: sent to the frontiers.
3. Obedience in the life of the Society.
4. Governance at the service of the universal mission.
5. Collaboration at the heart of the mission

D4: Obedience

Nr. 20: “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.”

Nr. 28: “The community is also a privileged place for the practice of apostolic discernment, whether through formally structured DC46 or through informal conversation that has the more effective pursuit of the mission as its goal.”

D5: Governance

Nr. 20 c.3. “In exercising apostolic leadership, the President should be involved, as appropriate, in the apostolic discernment of Provinces and Regions.”

On January 2009, shortly after the GC 35, Fr. A. Nicolás SJ reflected on the reasons behind DC whilst addressing a group of Jesuits and laypersons and brought up a few questions about why DC is at the core of Ignatian spirituality. (Nicolás, 2009)

- Why does the job of an apostolic body need a permanent DC? Why is it not enough for the personal discernment of superiors, leaders, and others, and it is necessary that the whole apostolic body of the community be involved?
- What elements and dimensions should we consider in today's world for a DC?
- The Ignatian Apostolic Community (layperson, religious, Jesuits): can DC become our specific contribution to the Church today?

GC 36 (2016, Fr. Arturo Sosa SJ): spiritual conversation to animate DC on the mission of reconciliation and justice

Father Sosa SJ named the first members of his team, including for the first time a General Councilor for Discernment and Apostolic Planning: Fr. John Dardis SJ.

Historical introduction

8. Companions in a mission of reconciliation and justice: “... Recalling the experience of the First Companions in Venice as they discerned what to do when political conditions thwarted them from going to Jerusalem, the Congregation emphasized that today’s Jesuit communities require the characteristics that make them capable of communal apostolic discernment.”

9. Renewed Governance for Renewed Mission: "... Three key features of governance in the Society today are discernment, collaboration, and networking."

D1: Companions in a mission of reconciliation and justice

A discerning community of open horizons

8. "In our individualistic and competitive age, we should remember that the community plays a very special role since it is a privileged place of apostolic discernment."

12. "An essential tool that can animate apostolic DC is spiritual conversation. Spiritual conversation involves an exchange marked by active and receptive listening and a desire to speak of that which touches us most deeply."

23. "Pope Francis constantly affirms that discernment should play a special role, in the family, among youth, in vocation promotion, and the formation of clergy."

27 "Christian life is increasingly personalized through discernment."

D2: Renewed Governance for a Renewed Mission

5. "Consistent and participative discernment is our way of ensuring that ongoing apostolic planning, including implementation, monitoring, and evaluation, is an integral element in all Jesuit ministry"

22. "GC 36 asks Major Superiors to ensure that apostolic discernment and planning in their Provinces or Regions is consistent with the universal apostolic preferences of the Society and the apostolic discernment and planning of their Conferences so that the mission preferences of the whole Society are taken into account in the ministries of their Provinces or Regions."

Fr. Francisco Jose Ruiz SJ, former Provincial of the Society of Jesus in Spain, highlights the strong endorsement of the General Congregation 36 to DC: "The apostolic religious life that the Society of Jesus' General Congregation 36 (2016) imagines for the Society today goes through the practice of DC, not without it" (Pérez, 2018).

3.2.5. Strategy

Having gathered a collection of several references encompassing various facets of strategic management, including strategy design, strategic decisions, emergent strategies, execution, practice, and mission, our examination spans nearly five decades of pivotal milestones in the field of strategy. Commencing from seminal works such as Ansoff's (1965) to contemporary contributions like those by Planellas and Muni (2019), this comprehensive review encapsulates significant developments from 1965 to 2019.

The narrative of strategy is a multifaceted exploration of decision-making, adaptation, and implementation within organizations, unfolding over time and across diverse contexts. At its core, strategy is viewed as a pattern in a stream of decisions (Mintzberg, 1978), encompassing both deliberate and emergent elements. This perspective allows for the study of strategies that were intended as well as those that emerged despite initial intentions (Mintzberg & Waters, 1985). It highlights the dynamic nature of strategy formulation and execution, acknowledging the interplay between planned actions and unplanned outcomes.

This understanding of strategy is further enriched by the identification of a basic structure underlying seemingly unstructured processes (Mintzberg et al., 1976). This structure provides a framework for analyzing decision-making dynamics and elucidating the reasons for success or

failure in strategy implementation (Miller, S., 1997). Also, decision-making dynamics are analyzed to shed light on factors influencing organizational adaptability and survival (Bourgeois & Eisenhardt, 1987).

Whilst facing the challenge of making strategic decisions, the 'circle of strategic decisions' framework guides through the decision-making process, with thirty of the most widely used strategic models, describing the content, context, and application of each of them (Planellas & Muni, 2019).

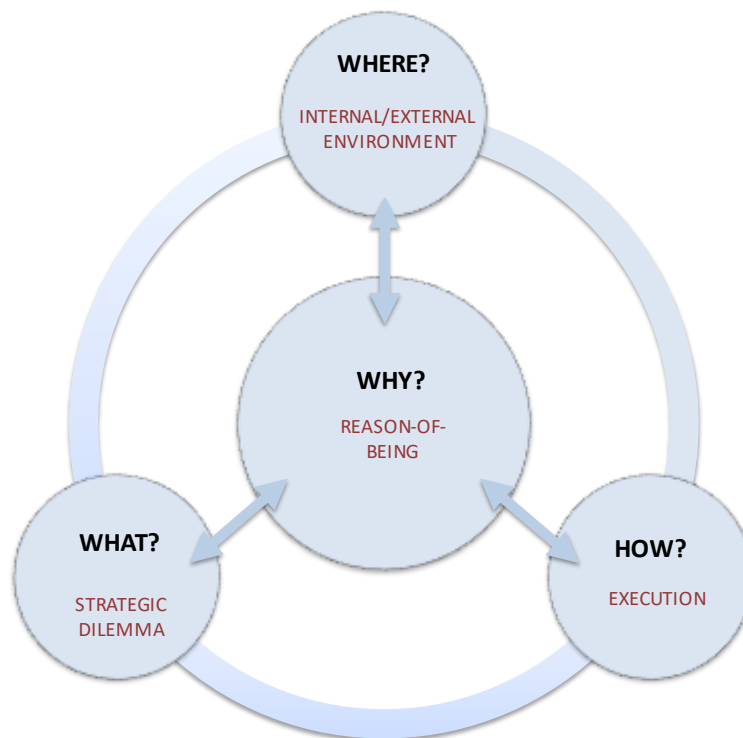
As organizations navigate complex environments and seek to sustain long-term performance, the implementation of strategy emerges as a critical challenge (Eisenhardt, Kathleen M. & Zbaracki, 1992). Skillfully executing strategy requires attention to detail and a thorough understanding of implementation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

Mission statements, widely used in practice, are an integral part of organizational identity and direction. Yet, they remain poorly researched in theory (Alegre, 2018), presenting an opportunity for further exploration and understanding of their impact on strategic decision-making and organizational outcomes.

Organization's strategy

In formulating an organizational strategy, fundamental inquiries encompass "Where?," "What?," and "How?". Addressing these inquiries necessitates a structured approach, as proposed by the strategic decision circle model developed by Planellas and Muni (2019). Figure 11, "Organization's strategy", delineates such a model based on a three-stage process: analysis, decision-making, and implementation.

Organization's Strategy



Source: Planellas, M., & Muni, A. (2019). *Strategic decisions: The 30 most useful models*. Cambridge University Press.

Figure 11 Organization's strategy

The analysis phase serves as the foundational stage, wherein internal and external factors are examined. This includes scrutinizing market dynamics, competitive landscapes, internal capabilities, and external opportunities and threats.

Subsequently, the decision-making phase entails synthesizing insights gleaned from the analysis to formulate strategic choices. These decisions encapsulate the organization's chosen direction, objectives, and allocation of resources to achieve desired outcomes.

Finally, the implementation phase translates strategic decisions into actionable initiatives. This stage involves cascading strategic objectives throughout the organization, delineating roles and responsibilities, and establishing mechanisms for monitoring progress and adapting to unforeseen circumstances.

A visual representation of this process via Figure 11, "Organization's strategy", elucidates its basic tenets. Positioned at the core of the model are the organization's mission, vision, and values, serving as guiding principles. These elements encapsulate the essence of the organization's purpose, elucidating the "Why?" behind its existence. They provide a compass for strategic decision-making, anchoring the organization's pursuits in its overarching aspirations and principles.

Strategic decisions: definition

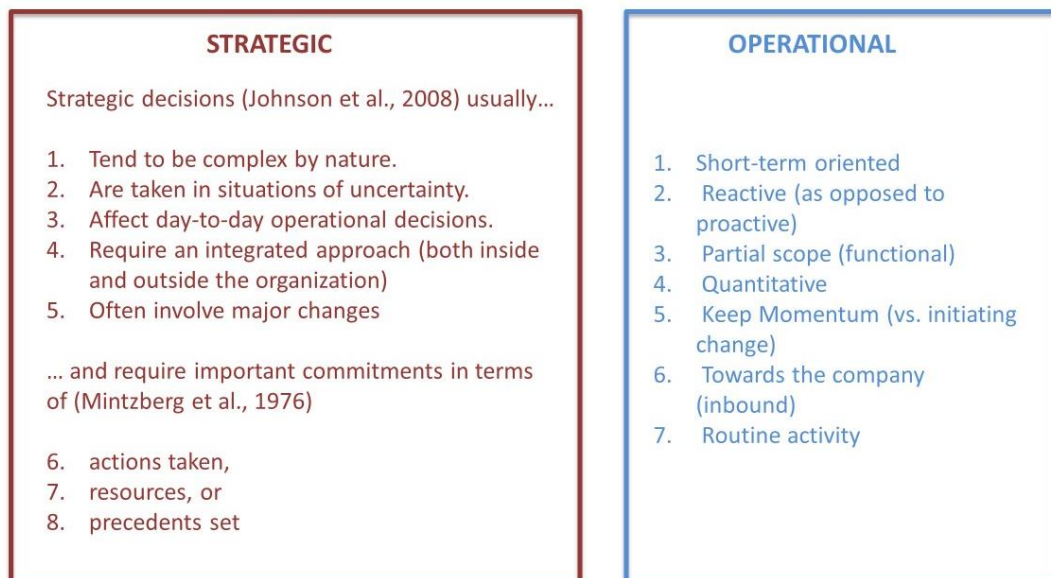
Figure 13 compares strategic and operational decisions, highlighting their distinct characteristics and implications within an organization.

Strategic decisions encompass pivotal activities that delineate the future trajectory of an organization, entailing the formulation of medium and long-term objectives. These decisions exert a profound influence on the overall direction and composition of the company, typically entailing substantial commitments of resources. The inherent complexity lies in the imperative for managers to navigate these decisions amidst limited information and a scarcity of precedents. (Johnson et al., 2008; Mintzberg, 1978)

Drawing from Gerry Johnson (2008), strategic decisions inherently possess complexity, necessitating multifaceted considerations and analyses. Moreover, they are situated within environments characterized by uncertainty, demanding astute navigation of ambiguous terrain. Despite the focus on long-term objectives, strategic decisions reverberate throughout the organization, permeating day-to-day operational decisions.

Furthermore, Henry Mintzberg (1978) accentuates that strategic decisions necessitate an integrated approach, transcending organizational boundaries to encompass both internal

Strategic vs. Operational decisions



Sources: own elaboration based on
 (1) Johnson, G., Scholes, K., & Whittington, R. (2008). *Exploring corporate strategy: Text and cases*. Pearson education.
 (2) Mintzberg, H., Raisinghani, D., & Theoret, A. (1976). *The structure of "unstructured" decision processes*. JSTOR. <https://doi.org/10.2307/2392045>

Figure 12 Strategic and Operational decisions

dynamics and external landscapes. They often herald significant changes, encompassing shifts in organizational structure, processes, or market positioning. Consequently, they entail substantial commitments in terms of actions taken, resource allocations, or the establishment of precedents.

Crucially, the burden of formulating strategic decisions rests squarely upon the manager, underscoring the irreplaceable role of leadership in charting the organization's course. Contrary to delegation, the formulation of strategy demands direct managerial engagement, reflecting the unique insights and contextual understanding possessed by organizational leaders. (Mintzberg et al., 1976)

Amidst the absence of a universally applicable model, managers must discern and adopt frameworks that resonate with the specific needs and dynamics of their organization. Embracing the mantle of strategists, managers embark on a continual learning journey, evolving in tandem with their organization as they navigate the intricacies of strategic decision-making. (Mintzberg & Waters, 1985).

Strategy execution

Over the years, literature on strategy execution or implementation has evolved significantly, reflecting advancements in understanding and practice.

The journey begins with foundational works such as Waterman et al. (1980), who challenged the notion that structure alone constitutes organization, setting the stage for a broader perspective on implementation. Subsequently, Roth et al. (1991) introduced the concept of operational capabilities and administrative mechanisms, shedding light on the intricacies of global strategy implementation at the business unit level.

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

As the field progressed, scholars like Miller (1997) and Noble (1999) delved into the practical aspects of strategy implementation, identifying success factors (Miller, S., 1997) and building implementation networks (Noble, 1999). Later, Freedman (2003) shifted the focus to the execution process itself, arguing that the true genius lies in effective implementation.

In the early 2000s, researchers began formalizing deployment processes, as evidenced by works like Hacker et al. (2001) and Okumus (2001), which proposed frameworks for streamlining implementation efforts. Aaltonen and Ikävalko (2002), further emphasized the importance of successful strategy implementation and introduced approaches for achieving it.

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

Recent works have provided comprehensive frameworks of leading practices for implementing strategic initiatives, consolidating learnings from previous research (Saunders et al., 2008), and offering actionable insights for practitioners (Tawse et al, 2021).

One notable example of successful strategy implementation can be found in a case study where authors examine the implementation journey of a large multinational corporation that successfully translated its strategic decisions into action. Through meticulous planning, stakeholder engagement, and effective communication, the organization achieved alignment across its various divisions and executed strategic initiatives with precision. This case illustrates the importance of robust implementation frameworks and proactive leadership in driving successful strategy execution (Miller et al, 2008).

Conversely, an example of poor strategy execution highlights a case study where a company failed to effectively implement its strategic decisions despite sound planning and resource allocation. The organization struggled with internal resistance, inadequate alignment between strategy and operations, and a lack of clear accountability. As a result, the intended strategic

objectives were not achieved, underscoring the criticality of addressing implementation challenges proactively to prevent failure (Linton, 2002).

By incorporating these examples, we underscore the real-world implications of effective and ineffective strategy implementation, drawing insights from the literature to illustrate key principles and lessons learned.

Strategy and discernment

To present the interplay between strategy and discernment, we must first delineate their inherent characteristics and operational dynamics, drawing insights from the combined insights of several literature sources. The strategy encompasses a multifaceted process of organizational navigation, as elucidated in several definitions of corporate strategy (Andrews, 1997; Ansoff, 1965), emergent and deliberate strategies (Mintzberg & Waters, 1985), and strategic decisions (Planellas & Muni, 2019). It encompasses strategic thinking (why), strategic definition (where), decision-making (what), and implementation (how), constituting a cyclic and non-linear trajectory. This holistic approach highlights the iterative nature of strategic endeavors, where adaptation and refinement are essential to navigate complex and dynamic environments effectively (Mintzberg & Waters, 1985).

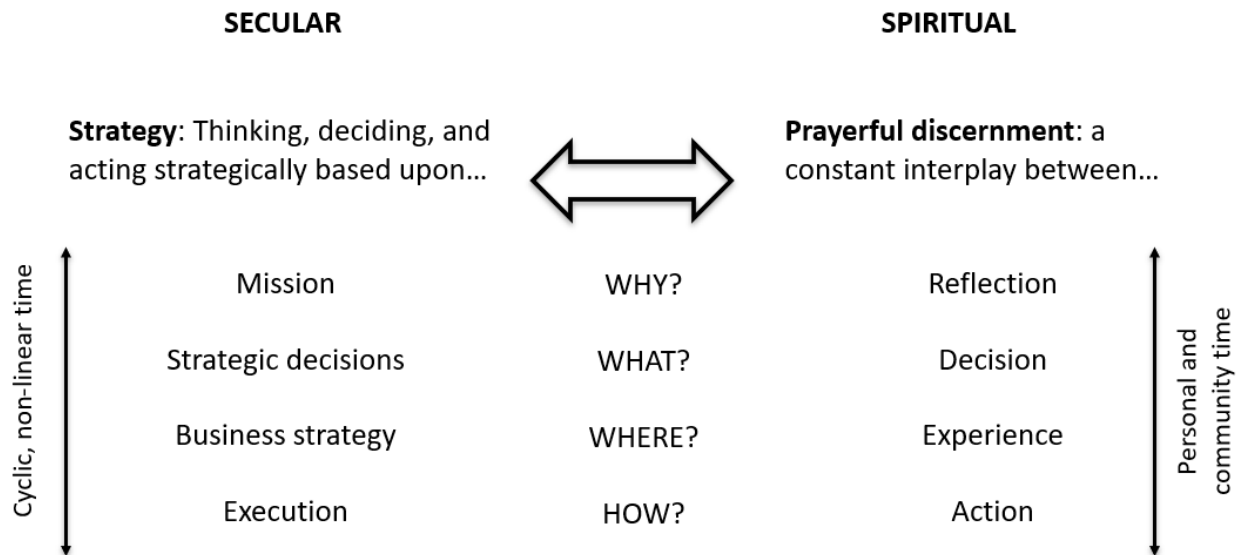
Discernment, as delineated by St. Ignatius in his Spiritual Exercises (Rambla, J., 2008), GC 36 and the invitation to DC (Pérez, 2018), the fundamental primary sources of the Society of Jesus (Rambla, J. & Lozano, 2019), as a constant in the lives of mature Christians (Tetlow, 2016), transcends mere analysis, embodying a refined process of perception, interpretation, and evaluation.

Both at the individual and communal levels, discernment unfolds as a continuous journey marked by reflection (why), decision (what), experience (where), and action (how). This iterative interplay fosters a dynamic equilibrium between intuition and analysis, guiding decision-making processes amidst uncertainty and ambiguity (Tetlow, 2016).

Strategy and discernment exhibit parallelism in their operational processes, as depicted in the attached figure (“Strategy and discernment”). While strategy encompasses the formalized phases of thinking, defining, deciding, and implementing, discernment mirrors this progression through the lenses of reflection, decision, experience, and action. This parallelism underscores the complementary nature of strategic and discernment processes in guiding organizational endeavors.

Figure 13 integrates secular strategy and spiritual discernment, drawing on a range of scholarly references to support its framework.

Strategy and Discernment



Sources: Andrews, K. R. (1997). Ansoff, H. I. (1965). Mintzberg, H., & Waters, J. A. (1985). Planellas, M., & Muni, A. (2019). Pérez, F. J. R. (2018). Rambla, J. (2008). Rambla, J. M., & Lozano, J. M. (Eds.). (2019). Tetlow, J. A. (2016).

Figure 13 Strategy and discernment.

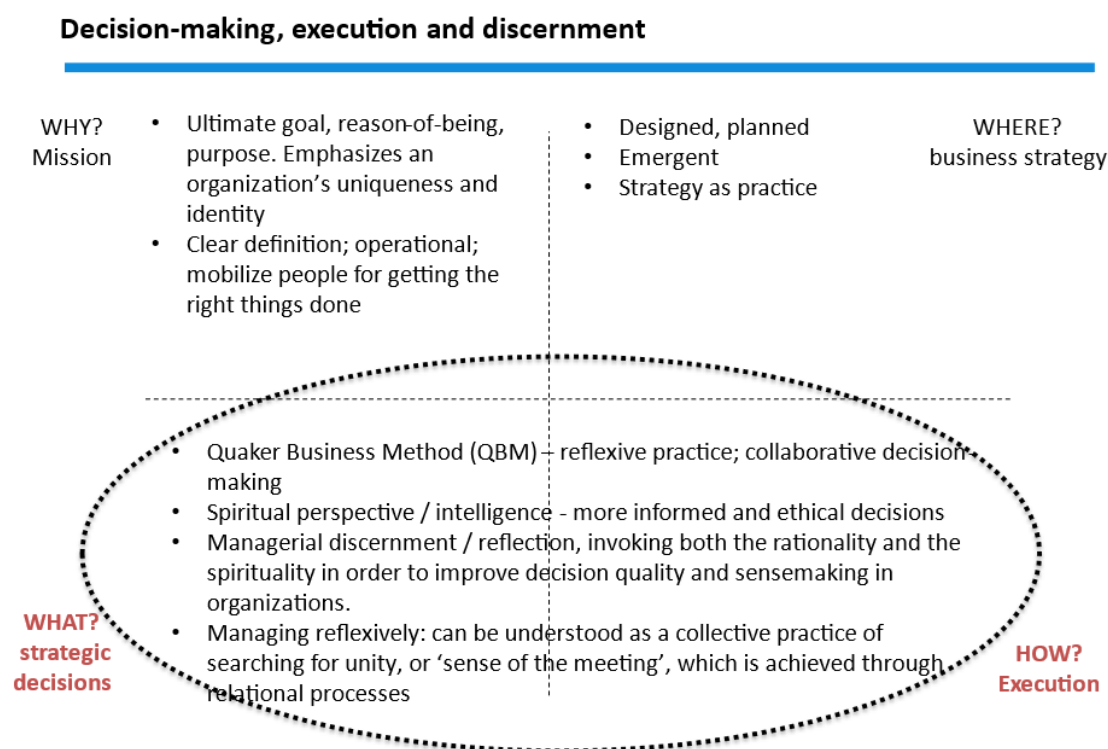
Andrews (1997) emphasizes the alignment of an organization's mission with its strategic decisions and business strategies, providing a foundational concept for the secular strategy component. Ansoff (1965) introduces the ideas of strategic decisions and business strategy formulation, essential elements in the secular strategy column. Mintzberg and Waters (1985) discuss the emergent and iterative nature of strategic planning, aligning with the framework's depiction of cyclic, non-linear time in secular strategy. Planellas and Muni (2019) explore the dynamic and evolving nature of contemporary strategic management practices, emphasizing the importance of the iterative nature of strategy.

Pérez (2018) provides insights into the reflective and decision-making processes in Ignatian spirituality, supporting the reflection and decision elements of spiritual discernment. Rambla (2008) reinterprets the spiritual exercises of St. Ignatius of Loyola, underscoring the significance of experience and action in spiritual practices. Additionally, Tetlow (2016) discusses Ignatian spirituality for the modern era, highlighting continuous discernment, which complements the spiritual discernment side of the framework. Rambla and Lozano (2019) compile fundamental texts on communal apostolic discernment, emphasizing the collective aspects of spiritual decision-making. Lastly, Planellas and Muni (2019) provide a comprehensive guide to strategic decisions with useful models, reinforcing the practical application of strategy in the secular context. These references collectively support the framework by illustrating the iterative and holistic nature of both strategic management and spiritual discernment, promoting a balanced approach to leadership and decision-making.

Decision-making, execution, and discernment

Whilst the previous model in Figure 14 compares secular strategy with spiritual discernment, the model in Figure 15, delves into Decision-making, execution, and discernment, with an emphasis on practical application and reflexive practices:

It seems that there is indeed a link between strategic decisions, operational decisions (execution), and discernment. This connection is rooted in the integrated nature of decision-making processes within organizations, as evidenced by the literature. Additionally, there is evidence suggesting a link between strategic decisions, operational decisions, and spiritual discernment, although it may be less explored compared to secular discernment, as illustrated in Figure 14 (Allen, 2017; Benefiel, 2008; Burton, 2016; Delbecq et al., 2003a; Miller, K., 2020b).



(*) Sources: own elaboration based on DISCERNMENT: Allen, S., D. (2017), Benefiel, M. (2008), Burton, N. (2017), Delbecq, A. L. et al (2003) , Falque, L. et al (2004), Miller, K.D. (2020). STRATEGY (PRACTICE): Andrews, K. (1997), Ansoff, I (1965), Mintzberg, H., & Waters, J. A. (1985). Planellas, M., & Muni, A. (2019), Whittington, R. (1996). MISSION: Alegre, I. et al (2018), Drucker, P. (2012).

Figure 14 Decision-making, execution, and discernment

In this context, the term discernment is used broadly to encompass the process of perceiving, interpreting, and evaluating information or situations to make informed decisions. This definition is consistent with the general understanding of discernment in organizational contexts, where leaders draw upon their insights, experiences, values, and beliefs to guide decision-making processes.

Delbecq et al. (2003) have extensively discussed the integration of spiritual discernment into organizational decision-making. They explore how spiritual practices can inform and enhance the quality of decisions within business settings by incorporating reflective and ethical

considerations. Their work emphasizes the value of collective discernment processes, such as those found in Quaker business methods (QBM), for fostering ethical and informed decision-making.

Benefiel's (2008) work focuses on the intersection of spirituality and leadership, specifically how spiritual discernment can be applied in organizational contexts. She highlights how spiritual practices can transform organizational culture, promote ethical leadership, and improve decision-making processes. Benefiel's research underscores the importance of integrating spiritual intelligence and discernment to achieve a more holistic and ethical approach to leadership.

Burton (2017) explores the role of reflexive practice and managerial discernment in organizations. He emphasizes how leaders can use spiritual discernment to navigate complex and dynamic environments, improve decision quality, and enhance sensemaking within organizations. Burton's work aligns with the idea that integrating rationality with spirituality leads to more informed and ethically sound decisions.

While discernment can encompass both secular and spiritual perspectives, the specific nuances or tones of spiritual discernment may vary depending on individual beliefs and cultural contexts (Benefiel, 2008; Burton, 2016; Delbecq et al., 2003b; Miller, K., 2020a).

Several sources provide insights into the role of discernment in organizational decision-making processes and leadership effectiveness, such as Allen's reflexive practice in "Discernment as a Critical Competence for Effective Leadership." (Allen, 2017), Spiritual Leadership, (Benefiel, 2008), the use of discernment in organizations (Benefiel, 2008; Burton, 2016; Miller, K., 2020b), strategic decision-making and discernment (Delbecq et al., 2003b), ethical decision-making (Falque et al., 2014).

Operational decisions, as highlighted in "Strategy as Practice" (Whittington, 1996), play a critical role in translating strategic intent into tangible actions. These decisions inform resource allocation, prioritization of tasks, and adaptation to changing circumstances. Effective operational execution relies on the integration of strategic objectives with day-to-day decision-making, reflecting the influence of discernment on operational effectiveness.

While the literature provides substantial evidence on the link between strategic decisions, operational decisions, and discernment, the exploration of spiritual discernment is comparatively limited. However, sources such as Benefiel's spiritual leadership (Benefiel, 2008) delve into the role of spiritual discernment in organizational leadership, emphasizing its influence on ethical conduct, values-based decision-making, and holistic perspective. This suggests that spiritual discernment can indeed inform strategic and operational decisions within organizations, albeit with potentially different mechanisms and outcomes compared to secular discernment.

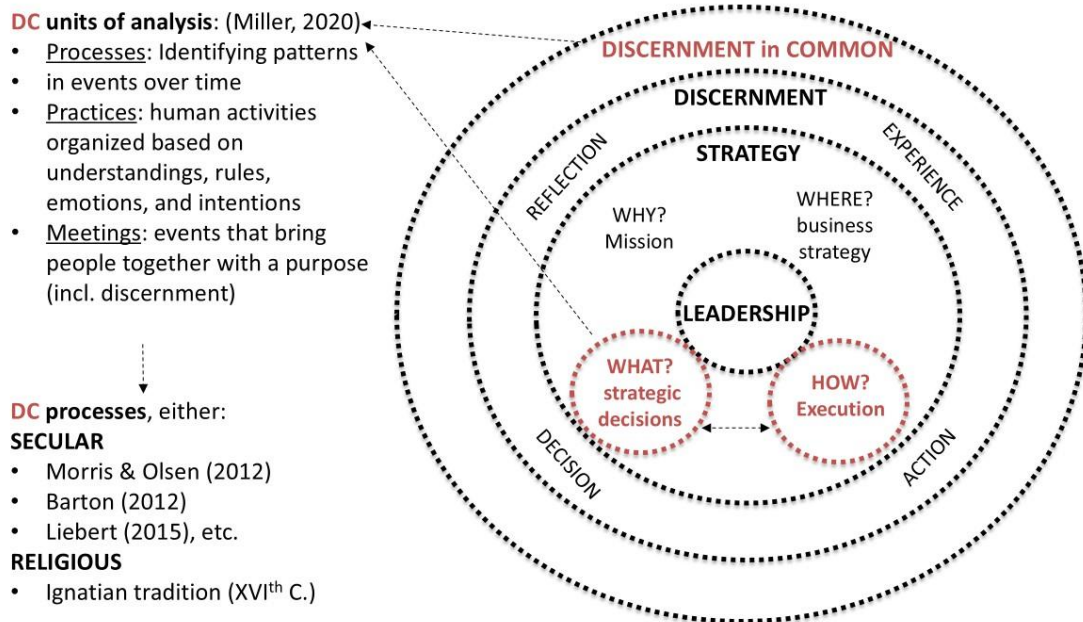
The literature evidence supports a strong link between strategic decisions, operational decisions, and discernment, both secular and spiritual (Andrews, 1997; Ansoff, 1965; Mintzberg & Waters, 1985; Pérez, 2018; Planellas & Muni, 2019; Rambla, J. & Lozano, 2019; Tetlow, 2016). While secular discernment is more extensively explored in the literature, there is evidence to suggest that spiritual discernment can also play a significant role in organizational decision-making processes. Further research in this area could provide deeper insights into the influence of spiritual discernment on strategic and operational effectiveness within organizations.

Decision-making and DC

Integrating insights on units of analysis (Miller, K., 2020b) in organizational decision-making (processes, practices, and meetings) with secular and spiritual discernment processes (Barton, 2012; Liebert, 2015; Morris & Olsen, 2012), and the Ignatian tradition from the 16th century (de Dalmases, 1990), we elucidate the interplay of decision-making and execution within the organizational framework.

In augmenting the complexity of strategy processes, as illustrated in Figure 15, we introduce the concept of DC as intricately linked with decision-making and execution. By mapping the organizational landscape (Miller, K., 2020a), DC unfolds within the areas of processes, practices, and meetings. This granular breakdown facilitates the identification of research insights, illuminating the dynamics of DC and its impact on strategic decisions.

Decision-making and Discernment in Common (DC)



(*) Sources: Own elaboration based on: MANAGERIAL REFLECTION: Miller, K. D (2020). DC: Morris & Olsen (2012), Barton (2012), Liebert (2015), de Dalmases, C. (1990)

Figure 15 Decision-making and DC

Moreover, our exploration extends to the identification of DC processes, drawing from both secular and spiritual traditions. Secular discernment processes provide invaluable frameworks for understanding how discernment operates within organizational contexts (Barton, 2012; Liebert, 2015; Morris & Olsen, 2012).

Morris and Olsen (2012) emphasize the importance of involving multiple stakeholders in the decision-making process to ensure that diverse perspectives are considered. Their approach highlights the need for collaborative efforts in identifying patterns, understanding contexts, and making informed and enhanced quality decisions.

Barton (2012) focuses on the integration of spirituality in leadership and decision-making processes, promoting a holistic approach that combines rational analysis with reflective practices, encouraging leaders to engage in continuous self-examination and reflection to

improve decision-making and incorporating ethical and spiritual values into the decision-making process to ensure that outcomes align with broader organizational and societal goals.

Liebert (2015) explores the role of discernment in organizational contexts, emphasizing the importance of collective reflection and dialogue in making strategic decisions, by facilitating group discussions that allow participants to reflect on their experiences, values, and intentions, and using dialogue as a tool to explore different perspectives and reach a consensus that reflects the collective wisdom of the group.

Additionally, we delve into the spiritual realm, tapping into the rich tradition of Ignatian discernment dating back to the 16th century (de Dalmases, 1990), rooted in the spiritual exercises of St. Ignatius of Loyola, which offers a structured approach to discernment by combining reflection, prayer, and communal dialogue (engaging a group in prayerful reflection and dialogue to seek divine guidance and achieve a unified sense of purpose).

This multifaceted approach enriches our understanding of discernment mechanisms, enabling a comprehensive analysis of its efficacy in shaping strategic decision-making and execution within our research case.

Strategic Decisions & Impact

In their seminal article "Implementing Strategic Initiatives: A Framework of Leading Practices" (Saunders et al., 2008), the authors underscore the significance of measuring the Organizational impact, or performance, resulting from strategic decisions. This imperative arises from the acknowledgment that adopting and implementing the right practices are pivotal for achieving "world-class" performance in contemporary organizational environments. The study delineates a framework of leading operations management practices and strategy deployment constructs derived from qualitative research conducted in organizational excellence contexts.

The measurement of organizational impact constitutes a crucial component of the strategic decision-making processes, understood as important commitments in terms of actions taken, resources, or precedents set (Mintzberg et al., 1976). It entails evaluating the outcomes and effectiveness of strategic initiatives in achieving predetermined objectives and organizational goals. Drawing insights from Saunders et al. (2008), this measurement process transcends mere procedural assessments and delves into the identification of variables influencing success or failure. It involves analyzing the tangible and intangible effects of strategic decisions on performance indicators.

Central to this measurement endeavor is a clear understanding of what constitutes a strategic decision vis-à-vis operational decision. The authors emphasize the importance of discerning between strategic decisions, which shape the overall direction and objectives of the organization, and operational decisions, which pertain to day-to-day activities and resource allocation.

Strategic decisions & impact

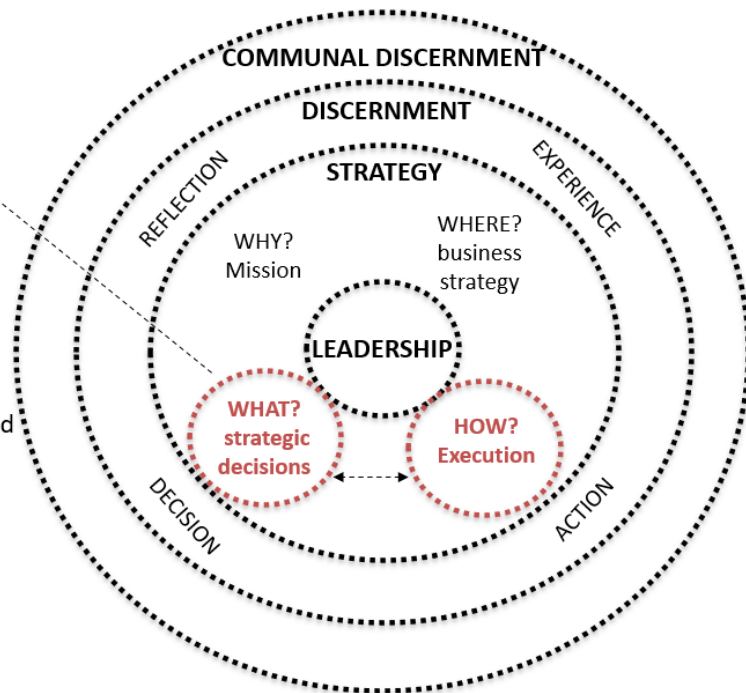
Strategic decisions:

- important commitments in terms of actions taken, resources, or precedents set (Mintzberg et al., 1976)

Impact:

Strategy deployment constructs (Saunders et al., 2008)

1. Communicating the initiative
2. Achieving buy-in (by stakeholders)
3. Aligning implementation
4. Learning (Continuous evaluation and adaptation)
5. Creating the infrastructure for deployment (Organizing teams)
6. Understanding the business drivers
7. Identifying deployment options (scheduling projects, assessing risk, choosing performance measures)



(* Sources: Mintzberg, H. et al. (1976), Saunders et al. (2008)

Figure 16 Strategic decisions and impact

The framework illustrated in Figure 16 provides a structured approach to evaluating organizational impact by delineating strategy deployment constructs derived from empirical research (Saunders et al., 2008). These constructs serve as the foundation for identifying key performance drivers and assessing the effectiveness of strategic initiatives:

- **Communicating the Initiative:** Effective communication of the strategic initiative is crucial for aligning stakeholders and ensuring that everyone understands the goals and objectives. This step helps in setting clear expectations and gaining initial buy-in, which is critical for successful implementation.
- **Achieving Buy-in by Stakeholders:** Gaining support from stakeholders is essential for the smooth execution of strategies. This involves addressing their concerns, providing necessary information, and involving them in the decision-making process to foster a sense of ownership and commitment.
- **Aligning Implementation with the strategic goals** ensures that all activities and resources are directed toward achieving the desired outcomes. This alignment requires continuous monitoring and adjustment to address any deviations or challenges that arise during execution.
- **Learning:** Continuous evaluation and adaptation are integral to the measurement process. By regularly assessing the progress and outcomes of strategic initiatives, organizations can

identify areas for improvement and make necessary adjustments. This iterative process of learning and adaptation enhances the overall effectiveness of the strategy.

- Creating the Infrastructure for Deployment involves organizing teams, defining roles and responsibilities, and ensuring that the necessary resources are available. This step lays the foundation for effective implementation and coordination across different parts of the organization.
- Understanding the Business Drivers that influence performance is essential for making informed strategic decisions. This involves analyzing market trends, customer behavior, competitive dynamics, and other external and internal factors that impact the organization.
- Identifying Deployment Options involves scheduling projects, assessing risks, and choosing appropriate performance measures. This step ensures that the most viable and effective options are selected, minimizing risks, and maximizing the chances of success.

By leveraging these constructs, organizations can gain insights into the linkages between strategic decisions and organizational performance, enabling informed decision-making, and continuous improvement (Saunders et al., 2008).

This chapter integrates individual discernment, DC, and strategic decision-making within ecclesial contexts, highlighting how spiritual and ethical principles intersect with organizational strategy. The literature reveals a gap in understanding the impact of discernment, particularly DC, on strategic decisions in ecclesial settings. DC enhances collective decision-making and mission alignment through shared spiritual values.

Strategic management frameworks from secular contexts are explored to connect discernment with strategy, showing how ethical values shape strategic decisions. While contemplative practices are vital for ethical leadership and strategic alignment, they are not much explored in ecclesial settings. This review identifies the need for a deeper exploration of how discernment uniquely informs strategic actions within this context.

Addressing this gap opens a window of opportunity, as it offers insights into how DC processes influence strategy deployment in ecclesial organizations, emphasizing communication, stakeholder buy-in, strategic alignment, continuous learning, infrastructure development, decision motives, and deployment options. This research aims to provide actionable insights that can guide ecclesial leaders in integrating discernment into strategic decision-making, particularly within the mission-driven context of the Society of Jesus.

4. Research methodology.

The narrative of qualitative research is a journey of exploration and discovery, shaped by both revolutionary shifts and gradual evolution in scientific development (Kuhn, 1962). At its core, qualitative research seeks to bridge the gap between everyday understanding and scholarly analysis, providing insights into the complexities of human behavior (Schutz, 1962).

Grounded theory emerges as a methodological approach that challenges traditional paradigms by generating theory from data, rather than imposing preconceived theories onto the research process (Glaser & Strauss, 1967). Through case studies, researchers delve into the nuances of qualitative inquiry, exploring methodologies, purposes, and applications while building theoretical frameworks from multiple cases (Eisenhardt, K. & Graebner, 2007).

Robert Stake developed the theoretical foundations of case study research with practical guidance on how to design, conduct, and analyze case studies and delved into qualitative case studies to explore their methodologies, purposes, and applications (2005).

Central to this journey is an understanding of power dynamics in qualitative research interviews, recognizing the influence of the interviewer on dialogue and knowledge production (Kvale, 2006). Principles and techniques of grounded theory, including theoretical coding, offer a systematic approach to data analysis, enriching the methodological toolkit of qualitative researchers (Thornberg & Charmaz, 2014).

Qualitative inquiry encompasses various approaches, including narrative research, phenomenology, ethnography, and case study (Creswell & Poth, 2018). Each approach offers unique insights into human experience, enriching our understanding of complex social phenomena.

Creswell and Poth (2018) describe qualitative research as a dynamic and iterative process involving multiple cycles of data collection, interpretation, and theory comparison. This cyclical nature of qualitative research requires researchers to continuously revisit their data and theories to refine their understanding. Integral to this process is the ongoing review of relevant literature, which helps ensure that the research is grounded in current theoretical frameworks and scholarly discourse.

Guidance on conducting effective literature reviews, as provided by Booth et al. (2019), offers systematic methods for searching, evaluating, and synthesizing existing research literature. This structured approach enhances the rigor and credibility of qualitative research findings by situating them within a comprehensive and up-to-date scholarly context. The process of conducting thorough literature reviews not only supports the iterative nature of qualitative research but also ensures that findings are robust and well-supported by existing knowledge.

Together, these perspectives underscore the importance of a continuous and systematic approach to literature review in qualitative research. By doing so, researchers can enhance the validity of their interpretations and ensure their work contributes meaningfully to the broader academic conversation.

4.1. Design

At the heart of this study lies a focused research question: What impact does DC have on strategic decisions in ecclesial organizations? This topic is relatively underexplored, with few studies addressing the details involved. Given the complexity of ecclesial decision-making processes, qualitative methodology suits this investigation. Qualitative methods allow for an in-

depth exploration of the subjective and contextual factors influencing strategic decisions, providing rich, detailed insights that quantitative approaches might overlook (Creswell & Poth, 2018; Glaser & Strauss, 1967; Stake, 1995).

To contextualize this investigation, a thorough exploration of the existing literature will identify gaps in understanding, particularly regarding the link between DC processes and their influence on strategic decision-making within ecclesial contexts.

To provide a foundational understanding, the concept of DC will be delineated, encompassing individual discernment processes, decrees issued by General Congregations, letters from Superior Generals, and the overall process involved in DC within ecclesial settings. This comprehensive overview sets the stage for exploring how these elements intersect and contribute to the decision-making processes within ecclesial organizations.

Similarly, a clear understanding of strategic decisions is crucial. This involves defining strategic decisions within the context of ecclesial organizations, identifying the unit of analysis, and establishing constructs for measurement. By elucidating the types of decisions that fall within this purview, such as those related to mission alignment, resource allocation, and organizational priorities, the study gains clarity and focus.

Robert Stake (1995) highlights that case studies are particularly effective for gaining an in-depth understanding of complex issues within their real-life context. This is especially relevant for this investigation into the impact of DC on strategic decisions within ecclesial organizations, where the intricacies of decision-making processes need to be deeply explored. He also suggests that intrinsic case studies, where the case itself is of primary interest, are particularly suitable when the research aims to gain a detailed understanding of a unique phenomenon. This aligns with the current study's focus on the unique practice of DC.

Along the same lines, Creswell (2018) emphasizes the value of case studies in capturing detailed, qualitative data that quantitative methods might overlook. This allows for a comprehensive understanding of how DC is practiced and its effects on strategic decisions.

In developing a case study, gathering information from a variety of sources is vital for enhancing the richness and validity of the findings. Robert Stake (1995) highlights several reasons for this approach: Triangulation (Cross-verifying data from multiple sources ensures consistency and reliability, leading to robust conclusions), Richness and Depth (Different sources provide unique insights, contributing to a more comprehensive understanding of the case), Contextualization (Multiple sources help situate the case within its broader context, which is essential for accurate interpretation), Validity and Credibility (Diverse data points enhance the credibility of the study by reducing bias and increasing confidence in the findings), and Complexity and Completeness (A variety of sources capture the multifaceted nature of complex cases, ensuring a thorough and detailed analysis).

To collect data, a multifaceted approach will be employed. This includes the utilization of teaching cases to glean theoretical insights and a reality check to ground the research in practical experiences and observations within ecclesial organizations. This dual approach ensures that the study captures both theoretical concepts and real-world applications, providing a comprehensive understanding of the phenomenon under investigation (Creswell & Poth, 2018; Eisenhardt, K., 1989; Stake, 1995; Yin, 2009).

The research design (Figure 17) focuses on the impact of DC on strategic decisions within ecclesial organizations. The theoretical framework begins with a review of ethics, spirituality, and leadership, and identifies gaps in measuring discernment's influence on strategic decisions within ecclesial contexts based on the literature review.

The qualitative research component includes methodology, findings, and discussion. The methodology chapter presents a case study on the integration of Spanish Jesuit provinces from 2008 to 2014. The findings are analyzed using Nvivo, leading to insights discussed in the final chapter, highlighting the study's contributions and limitations.

Figure 17 Research design

Research design			
	STEPS	chapter	TOPICS
	Research question	2	What impact does Discernment in Common have on strategic decisions in ecclesial organizations?
	Theoretical framework	3	Ethics, spirituality, and leadership. Literature review on discernment and strategy. Ecclesial context. Gap: measure the impact of CD on strategic decisions.
Qualitative Research	Methodology	4	Case study: "The integration of the Spanish provinces of the Society of Jesus (2008-2014)."
	Findings	5	Analysis of collected data. Use of Nvivo.
	Discussion	6	Organizational Strategy, CD, Spirituality, and Contemplative Practices in Management
	Conclusions	7	Contributions Future challenges and ecclesial context Limitations and future development

Sources: own elaboration

In the previous chapter, we thoroughly explored the critical constructs of the research question. Specifically, grounded in the theoretical framework, we examined how DC influences strategic decisions within ecclesial organizations, deriving insights from an extensive body of literature on ethics, spirituality, leadership, discernment, and strategy, all within an ecclesial context.

In this chapter, research methodology, we focus on the integration of the Spanish provinces of the Society of Jesus as our case study. This case was selected to observe the practical application of DC in strategic decisions regarding organizational structure. It provides a unique opportunity not only to understand its impact on the decision to integrate these provinces but also to gain insight into the decision-making and integration processes up to 2014, offering valuable theoretical insights and highlighting its influence on organizational cohesion and governance.

The case study on the integration of the Spanish provinces of the Society of Jesus is structured into two main phases spanning from 2021 to 2024, employing a multifaceted approach to data collection and analysis. This comprehensive methodology aligns with established case study

research practices advocated by Robert Stake (1995) and Robert Yin (2009), ensuring a rigorous and holistic understanding of the integration process.

4.1.1. Research Structure

In Phase 1 (2021-2022), the research team focused on extensive data collection. This included interviewing eight key stakeholders, gathering internal documents from the Society of Jesus, and utilizing publicly available databases. The aim was to develop a teaching case that encapsulates the unique context, research questions, and qualitative methodologies used. This phase produced a teaching case and a corresponding teaching note, designed for instructional purposes and theoretical insights, echoing the approach suggested by Eisenhardt (1989) for building theories from case study research.

Phase 2 (2023-2024) built upon the initial phase, incorporating additional data such as measurement constructs and further interviews and documents. This phase aimed at deepening the analysis and interpretation of the collected data, ensuring robustness through triangulation (Stake, 1995). The comprehensive research report and detailed research case produced in this phase encapsulate the findings and insights gleaned from the study.

4.1.2. Data Collection and Analysis

Interviews, conducted remotely between November 2021 and April 2024, followed a protocol including recording and detailed questioning. General questions explored roles, experiences, group dynamics, and key contributions to the integration results, while specific questions targeted the effects of DC on stakeholder buy-in, alignment of organizational actions with strategic directions, and the evolution of strategy during implementation. This approach aligns with the qualitative data collection techniques advocated by Creswell and Poth (Creswell & Poth, 2018), emphasizing the importance of detailed, context-rich data.

Three key variables—focus, depth, and saturation—were high, with 17 interviews averaging 67 minutes each, ensuring comprehensive data coverage. The participants, all with governance responsibilities in the Society of Jesus, provided valuable insights into the integration process, contributing to a robust understanding of the phenomenon under investigation. This aligns with the inclusive approach to data collection recommended by Baxter and Jack (2008), which ensures that complex phenomena are captured comprehensively and accurately.

4.2. Case Study Research

Case study research is a qualitative method that delves deeply into specific phenomena within their real-life context. Rooted in the epistemology of science, particularly interpretivism, and constructivism, it aims to understand complex social phenomena through detailed exploration and analysis. Case studies emphasize the importance of context and seek to uncover the subjective meanings and perspectives of individuals involved. (Stake, 1995)

Epistemologically, case studies recognize the subjective nature of knowledge and the role of interpretation in understanding reality. They align with interpretivist and constructivist paradigms, which emphasize the importance of multiple perspectives and subjective experiences in generating knowledge (Saunders et al., 2008). By embracing the complexities and subtleties of human experience, case study research contributes to the richness of qualitative inquiry and offers valuable insights into the intricacies of social phenomena.

4.2.1. Epistemology and Case Studies

Epistemology is a branch of philosophy that deals with knowledge, using the principle of induction – going from the particular to the general (Comte, 1856). The case method studies a

particular situation to discover the properties of a similar situation. In other words, it is a method of observation in social science that involves many units of observation related to interviews, questionnaires, financial or statistical data. (Eisenhardt, K., 1989)

Every type of observation is subject to its specific methodological rules such as statistical theories and interview criteria (Eisenhardt, 1989). It is the best bridge from qualitative evidence to mainstream deductive research – whilst inductive theory building from cases produces new theory from data, deductive theory testing completes the cycle by using such data to test the theory.

4.2.2. Research Case Studies.

Research Case studies can be used to provide a description, test a theory, or to generate theory (Eisenhardt, K., 1989). Robert Yin published a reference book for case study research back in 2009 where he emphasizes the research design, data collection, and analysis (Yin, 2009). According to Yin, the research question is key to linking design and conclusions, thus such questions determine the methodology. His methodology is based on four parts:

1. Defining a study proposition.
2. Defining the unit of analysis once the research question has been proposed.
3. Linking the data to the proposition/s.
4. Criteria for interpreting the findings.

Yin (2009) has a positivist approach and stresses rational generalization with specific and prescriptive methodologies. He aims to reach theoretical generalization and external validity and emphasizes the need to use different cases (at least, fifteen) to reach conclusions. Thus, he proposes a detailed methodology to conduct research through cases.

Coming from a different perspective, Robert Stake is more flexible than Yin, defending the likelihood for a case to lead to understanding, whilst following the emerging logic of the research (Stake, 1995). According to Stake (1995), “finishing a case study is the consummation of a work of art. A few of us will find a case study (...) the finest work of our lifetime. Because it is an exercise in such depth, the study is an opportunity to see what others have not yet seen (...). The case study is a splendid pallet”.

Stake is more empirical than Yin and defends intuitive generalization based on personal experience. He focuses on learning from single cases, and on the difficulty of generalization in human acts.

Kathleen Eisenhardt, like Yin, proposes a positivist approach, prescriptive in nature, and advocates particular approaches in design (1989). However, whilst Yin aims to reach theoretical generalization and external validity, Eisenhardt claims the importance of the context but focuses on theoretical replication. She highlights theory building in the aim of the study and a-priori-constructs (unlike Yin, not hypothesis) that can change throughout the case study. She proposes four or five cases based on replication to have analytical generalization (Yin, as indicated earlier, proposes at least fifteen).

Research case studies approaches

	Yin (2009)	Stake (1995)	Eisenhardt (1989)
1	Fifteen cases	Single case	Four or five cases
2	Design case study		Getting started: research question, constructs. Selecting cases
3	Prepare for data collection		Crafting instruments and protocols
4	Collect the evidence	Data gathering	Entering the field: data collection
5	Analysis of the evidence	Analysis and interpretation Triangulation	Data analysis Shaping hypothesis Enfolding literature
6	Report case study	Write the report	Reaching closure
7	Rational generalization, prescriptive	Intuitive generalization,	Positivist, prescriptive, theory building

Sources: own elaboration based on
 (1) Eisenhardt, K. M. (1989). *Building theories from case study research*. The Academy of Management Review, 14(4), 532-550. <https://10.2307/258557>
 (2) Stake, R. E. (1995). *The art of case study research*. Sage.
 (3) Yin, R. K. (2009). *Case study research (4. ed. ed.)*. Sage.

Table 3 Research case studies approaches

Table 3, “Research case studies approaches”, illustrates a summary of the three different approaches to the issue of research case studies.

Case studies are particularly valuable in research contexts where no prior studies exist (Van de Ven et al., 2000), when there is a need to explore 'why' and 'how' questions (Eisenhardt, K. & Graebner, 2007), when the relevance of a sample is questionable, or when understanding a complex phenomenon from a holistic perspective is necessary and control over variables is limited.

4.2.3. Case Study on the Integration of the Spanish Provinces of the Society of Jesus Based on Stake’s (1995) thought that one case is enough because it is the insight that provides a high level of richness (“the unique case”), one research case study was developed for the sake of this research (see Annex B for further detail on the Research Case Methodology) with the following title: The integration of the Society of Jesus provinces in Spain: a restructuring with Spirit (2008-2014). A snapshot of the key variables of the case is outlined in Table 4, including dates, coverage, organizational traits, mission, and period.

Snapshot of the Province of Spain of the Society of Jesus case (2008-2014)

Spanish Province – SJ	Facts
Date of establishment	1547 (Fr. Antonio Araoz SJ, appointed first provincial of Spain) ²
Geographical coverage	Spain
Type of organization	Province of the Society of Jesus
Organizational dependency	Superior General
Provincials	Fr. Elías Royón SJ (2004-2010) Fr. Francisco José Ruiz SJ (2010-2017)
Mission	To carry out apostolic work, propagate the faith, pioneer methods of inculturation, educate youth, work in all fields of knowledge, confront injustice, and defend human rights ¹
Time span of the case	6 years (2008 – 2014)

Sources: own elaboration based on
 (1) Jesuitas España. (2018). *Jesuitas Provincia de España. Quiénes somos*. jesuitas.es. <https://jesuitas.es/es/inicio/quienesomos>
 (2) Vila, I. (2013). *Los jesuitas en la rambla de Barcelona*. Claret.

Table 4 Snapshot of the Province of Spain - SJ

As a general background, the case (see Annex D for a complete version in Spanish) starts with the integration decision description, briefly introduced in the following paragraphs:

It was the year 2006 and the then Provincial of Spain since 2004, Elías Royón SJ, with coordination responsibilities for the five provinces in Spain, posed the question to the Provincial table: “What do we do with the integration of our provinces? We must face this challenge and the reality that we foresee for the next fifteen years.” The Provincials decided to take the issue to their respective consultations, but no substantial support was found.”

Some of the fundamental reasons at that time against the eventual integration process included:

- *The negative impact of the temporal proximity of a similar integration attempt, which failed (2003).*

- Several Provinces were convinced that they still had sufficient apostolic capacity, at least for the short/medium term.
- Doubts, in the case of undertaking integration, about whether all the Provinces had to be involved together, creating a single Province, or whether they had to do so in two separate groups (of two and three Provinces).
- Lack of awareness between the Provincials and their Consultations, in general. The project logically aroused more reluctance when there was a lack of a global vision of the situation of the Society of Jesus throughout the territory.
- Difficulty of the project itself: it represented a challenge of enormous dimensions, for which there was no prior imagination that would help visualize the end of the process.

At the same time, fundamental questions arose that looked at the most universal good beyond the successful or failed situations, and that activated the dynamic of calculating what was gained or lost as a singular Province:

- Were the current apostolic strengths in some Provinces apparent and could they be transformed into weaknesses in the medium and long term?
- Did it make sense to let some weaker Provinces die and let only the strongest ones survive?

In Spain, the Provincials had already promoted, in the regular Consultations of the Provincial of Spain, the collaboration and coordination between the various apostolic sectors of the five Provinces existing since 2004: Aragón, Bética, Castilla, Loyola, and Tarraconense.

But the question remained open: were these interprovincial coordination and collaborations sufficient for each Province to be able to provide on its own the “greatest and best possible service” from the Ignatian way of proceeding?

An evaluation of this capacity to generate a new community and apostolic reality could indicate that the journey made had reached its limit. The figure of the Provincial of Spain may need a new framework that would give him sufficient authority to make binding decisions.

The General Congregation (CG) 35 of the Society of Jesus, which concluded in Rome at the beginning of 2008, asked Fr. General Adolfo Nicolás SJ to launch a process of reflection on the Provinces of the Society in the world, with the aim of better serving the universal mission. This process was to include “the complete review of the criteria for the creation, reconfiguration, and suppression of Provinces and Regions: numerical and geographical size, age distribution, availability of people for government and training, economic viability and capacity to develop an (apostolic) plan” that responded to local, regional and universal needs.”

The continued decrease in vocations in recent years and the evolution of the demographic situation of the provinces from 2010 to 2020 anticipated a decrease of almost 600 Jesuits or 58% accumulated in ten years.

Furthermore, in the global context of the mission at that time, GC 35 encouraged “improving the government of the Provinces” by placing them in a broader context, which in the case of Spain was the European environment. In the key of Ignatian magis,

daring was requested in the way of working apostolically and that required a transnational and transcultural attitude.

At the same time, a new expanded identity opened up, the experience of a somewhat new “we.” The Jesuits felt invited to understand themselves in collaboration with the laity, religious, and agents of the Church, and with those who shared the same horizon of change. That qualitative leap belonged to the process and was a certain condition of possibility. Clarifying the real participation of the laity in the integration process became a challenge in terms of “shared mission”: on the one hand, it was an issue for the Jesuits; but, on the other hand, the integration process was going to affect the laity.

The assessment of the integration of the Society of Jesus in Spain was conditioned by two specific factors:

- *the large dimensions of the province that was created – more than 1,000 Jesuits and 300 institutions and apostolic works – which were once classified with new criteria were reduced by just over 20%.*
- *the process of decline in the number of Jesuits that was suffered – more than 50 Jesuits died per year.*

In his address to GC 35, Benedict XVI recognized the vocation of the Society of Jesus to be on the borders. The context described above is border territories, that is, all those spaces where humanity is broken or called into question. And also, those others in which the presence of the Church, or even religion, begins to be questioned, ignored, viewed with prejudice, or openly rejected. These spaces were (and perhaps continue to be) increasingly extensive and more problematic. In the circumstances of decline and the search for new frontiers, essential questions had to be faced in the current moment of Religious Life.

It seemed that the most convenient response to these challenges was to initiate a process for the elaboration of an Apostolic Project common to all the Provinces and, consequently, the creation of a new Province that would integrate the current five. A project that responded creatively to the options of the Society of Jesus formulated in the last General Congregations.

At the end of 2008, the Provincial Board of Spain decided what they saw as necessary and could not be postponed: the integration of provinces through the creation of a new Province, based on the Provincials' own experience of government, their respective Consultations, a shared diagnosis and the support of Father General Adolfo Nicolás SJ – who had given his approval to the project during a conversation in the final section of GC 35 that ended in March 2008.

The action of the highest authority of the Society, for such a complex process, was essential. He made visible a mechanism very typical of the Company's style of procedure, in which the exercise of authority is conceived as a way of specifying discernment and directing it to a concrete decision. In that tradition, the decision of a General is a certain point of no return: once integration was decided, it was no longer legitimate to return to whether it was possible or not, but rather it had to be put into motion.

The intuition was that together and all, the Jesuits of the five Provinces (Aragón, Bética, Castilla, Loyola, and Tarraconense), together with their collaborators, would better face the evangelizing mission that the Society of Jesus could carry out in Spain at that time.

Integration would help to address the general situation of non-viability of the Spanish Provinces. Despite the differences (not all the Provinces were in the same missionary state of strength or weakness), opting for a Province was accepted as the best solution to undertake the future of the Society of Jesus in Spain.

Furthermore, the option for a single Province also fed a charismatic axis: unity spoke of universality, of common vision, of shared community and apostolic reality. A partial integration lacked that impact.

On October 28, 2008, Father Elías Royón SJ sent, together with the five Provincials, a letter to Father General Adolfo Nicolás SJ, requesting his approval to begin the process of integration of Provinces. Attached to this letter were the Minutes of the recent Consultations and two documents that included the fruit of their deliberations: "Budgets of the integration process" and "Integration process."

This letter commented on the laborious itinerary that they had followed in recent years, aimed at strengthening interprovincial apostolic coordination as much as possible and, from the then situation of the Company in Spain, it stressed that they had concluded that collaboration integrated was no longer sufficient to develop an apostolic plan that responded to local, regional and universal needs.

It was then anticipated that the integration process would take place in two different moments:

- *The first would be a transitional phase, whose initially planned duration would cover from 2010 to 2016, in which the five Provinces of that time would continue to exist.*
- *The second moment would begin with the erection of the Province in 2016.*

Father General approved the proposal to erect a single Province that would cover the entire territory of the State and the general lines of the process, and at the same time encouraged all the Jesuits of the Provinces to contribute to the process "with an abundance of generosity and availability." The process began with an eye toward the greatest and best service to the Church and society, so that the Company could continue providing its mission with renewed drive and fervor. In the words of Father General, it was about undertaking a process of "restructuring with Spirit" considering a way of proceeding that entered into a spiritual dynamic similar to that which had developed until then, and in building the future in abundance of generosity. and availability. It was November 14th, 2008, the feast of Saint Joseph Pignatelli. (Mogas et al., 2022)

4.3. Interviews

4.3.1. Research Design

The research process unfolds in two distinct phases spanning from 2021 to 2024, as illustrated in Figure 18.

In Phase 1 (2021-22), the case study methodology begins with inputs that include eight interviews, internal documents from the Society of Jesus, and public databases. This phase focuses on developing a teaching case by examining a unique situation, formulating research

questions, and understanding the nature of qualitative research. The process involves data gathering, analysis, interpretation, and defining the roles of case researchers. The outputs of this phase are a teaching case and a teaching note, with a focus on strategy formulation encompassing decision-making, design, and execution, along with collecting testimonials.

Moving to Phase 2 (2023-24), the inputs consist of the previously developed teaching case, constructs of measurement, nine additional interviews, and more internal documents from the Society of Jesus. This phase emphasizes analysis and interpretation, continuing the roles of case researchers, and incorporates triangulation and report writing. The outputs are a comprehensive report and a detailed research case. The focus here shifts to the decision-making, design, and execution processes, considering both individual and communal experiences.

Throughout both phases, the research team assumes various roles as case researchers, actively involved in data collection, analysis, interpretation, and reporting. This structured approach ensures rigor and coherence in the research process, facilitating a comprehensive understanding of the integration process within the Spanish proto-province of the Society of Jesus.

Case study methodology

PHASE 1 (2021-22)	INPUT	TEACHING CASE ⁽¹⁾	OUTPUT	FOCUS
	<ul style="list-style-type: none"> 1 Interviews (8) 2 Internal documents (SJ) 3 Public data bases 	<ul style="list-style-type: none"> 1 The unique case 2 Research questions 3 The nature of qualitative research 4 Data gathering 5 Analysis and interpretation 6 Case researcher roles 	<ul style="list-style-type: none"> 1 Teaching case 2 Teaching note 	<ul style="list-style-type: none"> 1 Strategy formulation: decision, design and execution 2 Testimonial
PHASE 2 (2023-24)	INPUT	RESEARCH CASE ⁽¹⁾	OUTPUT	FOCUS
	<ul style="list-style-type: none"> 4 Teaching case 5 Constructs of measurement⁽²⁾ 6 Interviews (9) 7 Internal documents (SJ) 	<ul style="list-style-type: none"> 5 Analysis and interpretation 6 Case researcher roles 7 Triangulation 8 Writing the report 	<ul style="list-style-type: none"> 3 Report 4 Research case 	<ul style="list-style-type: none"> 1 Decision, design and execution processes: individual and communal experiences 2 Future challenges

Sources: own elaboration based on

(1) Stake, R. E. (1995). *The art of case study research*. sage.

(2) Saunders, M., Mann, R., & Smith, R. (2008). Implementing strategic initiatives: A framework of leading practices. *International Journal of Operations & Production Management*, 28(11), 1095-1123. <https://10.1108/0144370810910908>

Figure 18 Case study methodology.

4.3.2. Protocol and Sample

The interviews were conducted between November 2021 and April 2024, all remotely. All interviewees accepted the protocol (see Annex C for further details) of recording and the motivations of the interviews, which were to carry out a research project on the Integration process of the provinces of the Society of Jesus in Spain.

In summary, the interview questions (General, open questions) were the following:

1. What was your role in the process of the integration of provinces?
2. How did you personally experience such participation?
3. Can you describe in detail how did the process work:
 - a. Who participated?
 - b. How were the group dynamics?
 - c. What conclusions/decisions did you walk away with at that time?
4. In perspective, what characteristics of the process contributed the most to the integration results (including but not limited to decision, design, and execution)?

The specific, direct questions were the following:

1. Introduction: Understand whether the practice of DC improved the level of buy-in from stakeholders - any group or individual who can affect or is affected by the achievement of the organization's objectives, (Freeman, 1984) regarding the strategic decisions made.

Question: In the process of DC based on which the integration of Provinces was carried out, what effect did the participation and consultation that were encouraged have? Did they lead to greater initiative and responsibility and stronger stakeholder commitment?

2. Introduction: Understand whether the values fostered by DC effectively ensured that organizational actions were aligned with the strategic directions.

Question: To what extent did the practice of DC contribute to more closely aligning the provincial government's decisions and the objectives to be achieved to complete integration?

3. Introduction: Understand whether the practice of DC enabled the planned strategy and emergent (unplanned) strategy to evolve together during the implementation of strategic initiatives.

Question: Were the successive steps of integration evaluated? Were the results of the evaluations carried out used to improve the process strategy?

Figure 19 shows the interview participants and the key facts about each of them, including date, role, and duration. Three key variables of qualitative interviews, focus, depth, and saturation were high. The saturation evolved, going from low to high as the interviews took place. The average length of each interview was over one hour and captured almost 1,000 words. Seventeen interviews were conducted in total, with repetitions with some of the ten interviewees to reach a satisfactory saturation level.

The profile of the participants is high, meaning they all had governance responsibilities in the Society of Jesus, including provincial posts at local and country levels, and also regional and corporate level governance responsibilities. They all participated directly or indirectly in the process of Integration, with decision-level responsibilities.

In Phase One, the sample included Fr. F. J. Ruiz SJ, interviewed five times, offering extensive insights from his tenure as the Provincial of Spain. This consistency in engagement provided depth and reliability in understanding strategic decisions. Fathers Barrero, Royon, and Soto, each interviewed once, contributed diverse perspectives, enhancing the data's richness.

Analysis of collected data (primary sources)

	Interviewee	Date		Role	length (minutes)	# words	Focus	Depth	Saturation	
		Year	MonDay							
Teaching Case (Working Paper)	1 Fr. F. J. Ruiz SJ	2021	11 5	Provincial of Spain	60	573	High	High	Low	
	2 Fr. F. J. Ruiz SJ	2021	12 9	Provincial of Spain	70	788	High	High	Low	
	3 Fr. F. J. Ruiz SJ	2021	12 16	Provincial of Spain	75	846	High	High	Low-Medium	
	4 Fr. F. J. Ruiz SJ	2021	12 21	Provincial of Spain	60	546	High	High	Low-Medium	
	5 Fr. J. Barrero SJ	2022	1 10	Provincial of Castille	90	1.518	High	High	Medium	
	6 Fr. E. Royon SJ	2022	1 10	Provincial of Spain	70	944	High	High	Medium	
	7 Fr. W. Soto SJ	2022	1 11	Provincial's "socio" (assistar	75	917	High	High	Medium-High	
	8 Fr. F. J. Ruiz SJ J. M.	2022	1 18	Provincial of Spain	75	988	High	High	Medium-High	
Research Case	9 Fr. F. J. Ruiz SJ	2023	10 5	Provincial of Spain	60	662	High	High	Medium-High	
	10 Fr. J. Barrero SJ	2023	10 30	Provincial of Castille	70	752	High	High	Medium-High	
	11 Fr. E. Royon SJ	2023	11 8	Provincial of Spain	70	780	High	High	High	
	12 Fr. J. J. Etxeberria SJ	2023	12 28	Provincial of Loyola	70	802	High	High	High	
	13 Fr. A. Allende SJ	2024	4 17	Delegate of Education	45	833	High	High	High	
	14 Fr. J. Melloni SJ	2024	4 21	Provincial Spirituality Group	45	1.105	High	High	High	
	15 Fr. A. España SJ	2024	4 26	Provincial of Spain	0	2.102	High	High	High	
	16 Fr. P. Borràs SJ	2024	5 3	Provincial of Tarraconense	60	680	High	High	High	
	17 Fr. J. M. Colina SJ	2024	5 8	Assistant Delegate of Educat	0	1.850	High	High	High	
					995	16.686				
					avg. length	66 mn	980 words			

Figure 19 Analysis of collected data (primary sources)

In Phase Two, the sample expanded to include repeat interviews with Fathers Barrero, Royon, and Ruiz, along with new insights from former Provincials Etxeberria, Borràs, and España (who served from 2017 to 2023). This inclusion ensured a comprehensive view of leadership changes and strategic transitions. Fathers Allende, Colina, and Melloni, with their roles in educational and spiritual initiatives, added a further dimension to the data, focusing on key organizational areas.

The overall profile of the sample reflects a balance of experience, roles, and tenure, contributing to the consistency and reliability of the findings, as each participant brought unique insights relevant to the research questions.

4.4. Analysis of Interviews

After the completion of the first eight interviews, a working paper was produced in the form of a teaching case with the following title: "The Integration of the Society of Jesus Provinces in Spain: A Restructuring with Spirit (2008-2014)". A teaching note was also developed to help with the teaching-learning process with students.

4.4.1. Teaching Note

In Phase One, the detailed interviews with a diverse and experienced sample led to the development of a comprehensive teaching case, accompanied by a teaching note. This working paper served pedagogical purposes, providing an in-depth exploration of strategic decisions and leadership dynamics within the Society of Jesus.

The repeated interviews with Father F. J. Ruiz SJ offered rich, firsthand insights from his extensive experience as the Provincial of Spain, ensuring the case was grounded in practical realities. Contributions from Fathers Barrero, Royon, and Soto added varied perspectives, enriching the content with their unique roles and experiences.

Specifically, the first eight interviews were instrumental in articulating the learnings from the teaching note around the following topics:

- Identify Strategic Themes: Align insights from the interviews with key strategic variables discussed, such as mission alignment and collaboration with laypeople.
- Examine Decision Processes: Use interview data to illustrate the processes of decision, design, and execution, highlighting real examples of consultation and strategy formulation.
- Apply Theoretical Frameworks: Reference specific frameworks used in the teaching note to analyze interview content, demonstrating how these frameworks enhance understanding of strategic decisions.
- Highlight Practical Solutions: Use insights from the interviews to discuss practical solutions proposed during strategic discussions, linking them to the criteria and options outlined in the teaching note.
- Discuss Mission and Vision Alignment: Reflect on how interviewees view the alignment of strategic decisions with the Society's mission, reinforcing the teaching note's focus on coherence and societal value.

The teaching note was structured around several key questions that were designed to be answered using relevant theoretical frameworks. These questions aim to guide the analysis and understanding of the case study, encouraging a deep exploration of the underlying concepts and principles.

By applying these frameworks, students can critically evaluate the scenarios presented, draw informed conclusions, and develop practical solutions:

- How do these theoretical frameworks enhance the analysis of the case study?
- What are the specific frameworks used, and how do they relate to the questions posed in the teaching note?
- How can these questions and frameworks together provide a comprehensive understanding of the key issues and facilitate effective learning outcomes?

The following section provides a summary of the proposed Q&A session with students. This summary outlines the key questions and answers that will guide the discussion, ensuring that students gain a comprehensive understanding of the subject matter. The Q&A session aims to clarify complex concepts, address any uncertainties, and encourage critical thinking and engagement through an interactive and insightful dialogue.

Q1. The Provincial Board of Spain decided (2008) to create a new Province and to face the reality that was anticipated in the following fifteen years. Based on your own experience in similar processes and the materials received, what strategic variables would you highlight from said decision process? (You can rely on Kenneth R. Andrews' "classic" strategy formulation scheme)

A1. The discussion spins around key strategic variables related to an organization or case study. It includes an external analysis focusing on global religious orders, religious sentiment in Spain, postmodernism, and globalization. The mission emphasizes service

to the Church through the Ignatian charism, addressing border territories and social justice, and sharing Gospel testimonies. The internal analysis predicts the evolution of the Society of Jesus in Spain for 2017, highlights collaboration with laypeople, and references the CG35. The values section underscores DC and the established way of proceeding.

Q2. What strategic options appear when faced with said integration decision and what criteria were used to finally decide on an eventual integration?

A2. The answer outlines various strategic options for managing provinces. The options include integrating only some provinces, integrating all provinces, continuing with the current structure, or delaying the decision. Each option is evaluated based on specific criteria, such as the greater universal good, the viability of weaker provinces, cultural and historical differences, fostering a common vision, and long-term sustainability. The options aim to address challenges related to community and apostolic realities, inter-provincial coordination, and the future viability of the provinces.

Q3. What processes were followed for the decision, design, and execution of the new Province?

A3. The exercise outlines the processes of decision, design, and execution for managing the provinces, focusing on whether to integrate some or all of them, continue as is, or delay the decision. Before 2008, a decision process involving options, criteria, and consultations with provincials took place, leading to strategic decisions sanctioned by the provincial. From 2008 to 2010, a more complex, consultative process occurred, involving announcements, commissions, and broader consultations, necessitating a new decision-making process and the construction of a new Province's architecture. From 2010 onwards, the focus shifted to execution, with the timeline advanced to 2014.

Q4. How does the explanation of the strategy contribute to the fulfillment of the Mission?

A4. The answer outlines key contributions and strategic data related to the new Province's mission and vision. It highlights the importance of clarifying the mission within a specific timeframe, aligning with other organizations, focusing on societal value, and ensuring coherence in actions. The new Province's mission is driven by the Ignatian way, aiming to offer exceptional service through various means, including witnessing Jesus Christ. The vision for 2016 focuses on revitalization, new vocations, addressing poverty and exclusion, and promoting diversity. Strategic pillars include new projects, governance structures, and apostolic initiatives to support these goals.

4.4.2. Coding process

Shortly after producing both the teaching case and the teaching note, we conducted nine additional interviews and began the coding process based on the grounded theory methodology (Thornberg & Charmaz, 2014). These authors discuss grounded theory as a methodology that emphasizes systematic coding to develop theories from data.

According to grounded theory, the coding process involves systematically collecting and analyzing qualitative data to construct theories grounded in the data itself. This approach is particularly effective for exploring complex social processes and generating new insights.

The purpose of this process was to involve iterative data analysis from the interviews to identify patterns and relationships, helping researchers generate comprehensive theoretical

frameworks directly from empirical evidence. The additional interviews served to deepen the understanding of emerging themes and ensure a robust analysis of the phenomena under study.

Figure 20, “Analysis of Interviews”, provides a comprehensive summary of our interview analysis process, highlighting the main phases and results. It outlines four key coding stages: Initial, Axial, Focused, and Theoretical. Each stage is described in terms of its specific objectives, the outcomes achieved, and the tools used for analysis in NVivo. This structured approach, rooted in grounded theory, ensures a thorough and nuanced understanding of the qualitative data, facilitating the identification of core themes and their interrelationships. Furthermore, the process demonstrates overall key elements of the grounded theory approach, such as identifying and categorizing themes or codes and making connections between these codes to develop a deeper understanding of the data.

For instance, the Initial coding phase involves a systematic examination of data to identify key concepts, resulting in the emergence of initial codes and patterns, visualized through word clouds. This phase aligns with the open coding process in grounded theory, where data is broken down into discrete parts and examined closely. According to Thornberg & Charmaz (2014), open coding is the first step in conceptualizing the data, enabling researchers to identify various properties and dimensions within the data.

Analysis of Interviews

CODING	DESCRIPTION	RESULTS	ANALYSIS IN NVIVO	OUTPUT
Initial	1 systematically examination of data, line by line, to identify concepts and patterns w/out preconceived categories.	Emergence of initial codes that capture key concepts and phenomena in the data.	Visualization tools, such as word clouds to explore patterns in the coded data.	10% of most cited words (1,000+); word cloud
Axial	2 deeper analysis and exploration of relationships between initial codes to identify themes and patterns.	Development of (sub)categories that form a hierarchical structure	Visualizing relationships between codes, such as coding stripes and matrices	coding queries
Focused	3 selecting the core category(ies) that best represents the central phenomenon of interest identified through axial coding. Integration of other categories and codes.	Refinement and integration of codes into a theoretical framework	Concept map to represent the relationships between categories and themes	4 “parent” & 10 “sub-parent & 70+ “children” codes
Theoretical	4 Further refinement with the focus on understanding the underlying processes, contexts, and dynamics shaping the phenomenon.	Development of a comprehensive theoretical explanation or model	Tools such as matrices or charts (i.e. network diagram)	7 constructs of strategy deployment ⁽²⁾ . Literature review

Sources: own elaboration based on:

(1) Thornberg, R., & Charmaz, K. (2014). Grounded theory and theoretical coding. The SAGE handbook of qualitative data analysis, 5(2014), 153-69.

(2) Saunders, M., Mann, R., & Smith, R. (2008). Implementing strategic initiatives: a framework of leading practices. International Journal of Operations & Production Management

Figure 20 Analysis of interviews

The Axial coding phase focuses on exploring relationships between these initial codes to develop hierarchical subcategories, visualized using coding stripes and matrices. This phase corresponds to the axial coding process in grounded theory, which involves reassembling the data in new

ways to identify connections between categories. Thornberg & Charmaz (2014) describe axial coding as a process of relating codes (categories and subcategories) to each other, refining and differentiating the categories.

The Focused coding phase aims to refine and integrate these codes into a theoretical framework, represented through concept maps. This phase is like the selective coding process in grounded theory, where the central phenomenon is identified, and other categories are integrated around it. As noted by Thornberg & Charmaz (2014), focused coding is crucial for synthesizing and explaining larger segments of data, guiding researchers toward the core categories.

Initial, axial, and focused coding generates data-driven and empirical codes and categories by building on constant comparisons of data, data and codes, and codes and codes.

Finally, the Theoretical coding phase seeks to develop a comprehensive theoretical model, utilizing tools such as matrices or network diagrams. This phase involves further refinement with a focus on understanding the underlying processes, contexts, and dynamics shaping the phenomenon, culminating in the development of a grounded theory. Again, Thornberg & Charmaz (2014) emphasize that theoretical coding weaves together the fractured story back into a coherent whole, elaborating on how the substantive codes relate to each other in theoretical terms.

4.4.3. The Use of NVivo

The process has been conducted with NVivo software, which offers numerous benefits and advantages for the qualitative analysis of interviews and documentation of information to support this thesis.

This tool facilitates the organization, coding, and analysis of large volumes of qualitative data, allowing the researcher to identify patterns, themes, and insights with ease. NVivo's user-friendly interface and robust features streamline the data analysis process, making it more efficient and less time-consuming.

Additionally, NVivo has advanced query and visualization tools that help in uncovering relationships and trends within the data, providing a deeper understanding of the research findings.

The software also offers collaboration capabilities, allowing multiple researchers to work on the same project simultaneously, ensuring consistency and enhancing the overall quality of the analysis.

Initial coding

According to grounded theory (Thornberg & Charmaz, 2014), we will start with an initial coding phase of the interviews, trying to understand what is happening in the data, and what the participant's main concerns are, and we will try to look at the data critically and analytically.

The constructivist approach within grounded theory methodology embraces flexibility by acknowledging the possibility of multiple significant or frequent initial codes emerging during the open coding phase. Researchers are encouraged to remain open to various interpretations and perspectives, allowing for a nuanced understanding of the data.

As such, the selection of initial codes is not rigidly determined but is instead subject to ongoing evaluation and refinement throughout the subsequent stages of analysis (Thornberg &

Charmaz, 2014). As a result of doing such an initial review, the researcher will eventually ‘discover’ the most significant or frequent initial codes that make the most analytical sense.



Figure 21 Word cloud

After uploading all the written interviews to NVIVO software (R.14), we conducted a preliminary analysis using the auto-coding feature to identify initial codes and themes, but the quality of the words chosen was not satisfactory.

To obtain a more accurate overview, we utilized NVIVO's word count feature, which provides a more precise analysis by ordering the most frequently used words in the interviews. This feature focuses on words longer than three characters and compiles a list of the top one thousand words mentioned.

It is important to note that the interviews were conducted and transcribed in Spanish, and the subsequent analysis was also performed in Spanish. A first-level discourse analysis was conducted through the frequency of words used by the interviewees. NVIVO's word cloud feature allowed us to visualize these frequencies.

Figure 21 (“word cloud”), shows that “province”, “provincial”, and “provincials” are among the most frequently mentioned words in the interviews. Other significant terms include “Jesuits,” “process,” and “(Fr. Superior) General.” This word cloud provides a snapshot of the key topics discussed by the interviewees, highlighting the central themes in their discourse.

Following a thorough examination of the textual data, including the refinement of certain terminologies from the initial dataset, it has been observed that a specific set of twenty+ words collectively constitute 10% of the entire corpus (see attached Table 5 “word count”). Among these, terms such as “process,” “provinces” and “provincials” emerge prominently, occupying the foremost positions, closely followed by references to “integration” and “Jesuits.” Notable

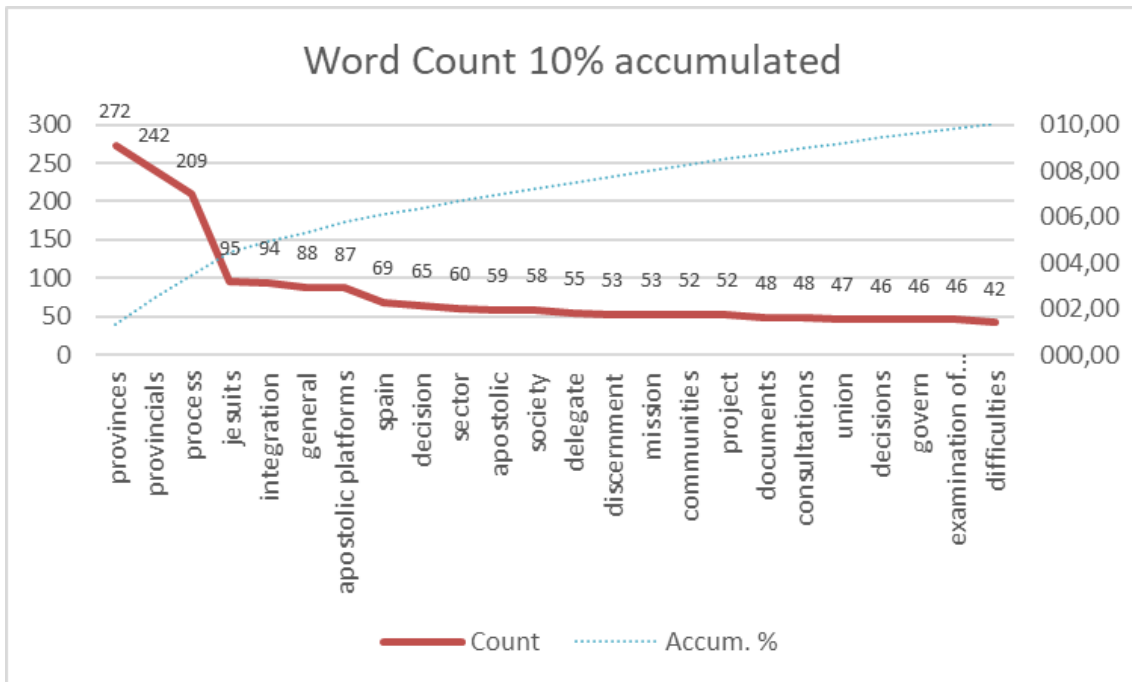


Table 5 Word count

additions to this lexicon include words like "decision," "General" (referring to the Superior General of the Jesuits), "apostolic platforms," "Spain," "society," "delegates," and "discernment". Table 4, "Word count", visually illustrates these 20+ significant terms, each occurring more than 40 times and collectively contributing to over 10% of the total word count derived from the interviews.

Building on the insights gathered from our earlier analyses, here is a concise overview of the case:

Before 2008, the **provinces** of the Society of Jesus in **Spain** faced a significant decline in the number of **Jesuits** and several **apostolic difficulties** in accomplishing their **mission**. The **provincial**, with the support of **Fr. General**, all the **provincials** of the five provinces in Spain along with the **Provincial**, and after careful **consultation** and consideration of significant **difficulties**, conducted a **discerned** process to **decide** on the **integration** of the provinces into **one proto-province** with a shared **apostolic project** and **governance** structure.

Axial coding

Our process went on by identifying and categorizing themes or concepts (codes) within the data and then making connections between these codes to develop a deeper understanding of the phenomenon under study. Specifically, the process consisted of:

- Analyzing Comments and Assigning Codes: We began by analyzing the comments from all the interviews, a process akin to open coding, the initial phase of grounded theory. We then assigned every relevant comment to a code name, aligning with the process of open coding, where data is broken down into discrete concepts or categories.

- Creating Multiple Codes: we came up with more than 70 codes based on the content of the interviews. This is consistent with the idea of generating numerous codes to capture the richness and diversity of the data, which is typical in grounded theory.
- Identifying Key Codes: We identified that eleven of these codes account for 50% of the total references from the interviews, as illustrated in Table 6 “Coding and references”. This table is important because it highlights the most frequently mentioned themes, providing a clear indication of the primary concerns and topics discussed by the interviewees. This step aligns with axial coding, where researchers focus on identifying core or central codes that are most salient in the data, thereby enabling a deeper understanding of the key issues and relationships within the qualitative data.

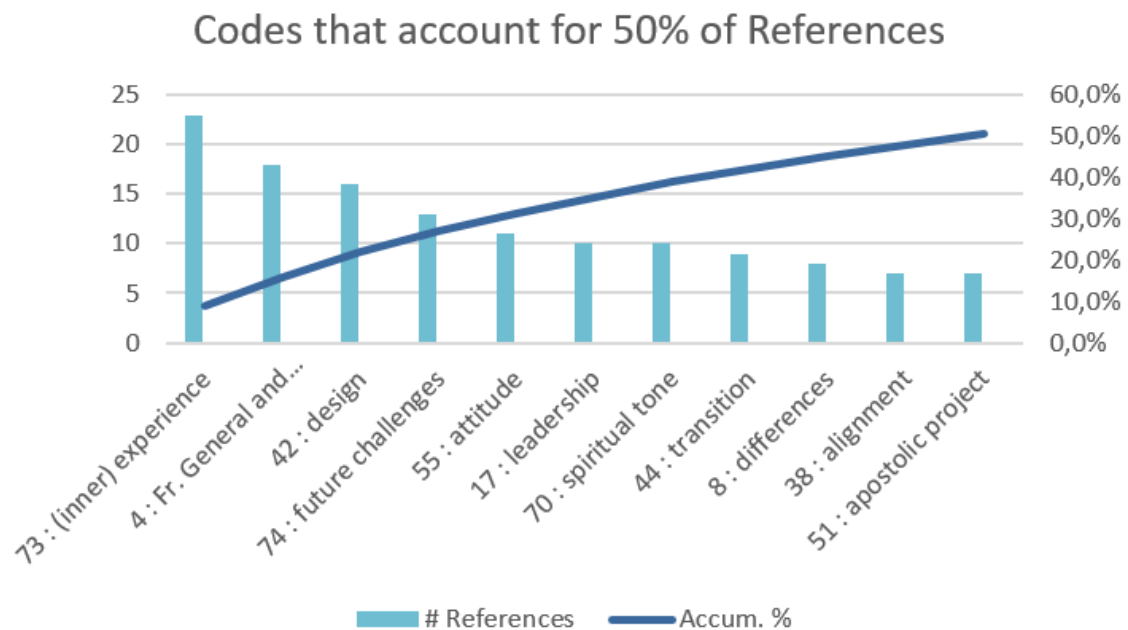


Table 6 Coding and references

- Making Connections: While axial coding specifically involves making connections between categories at a more abstract level, our process of identifying key codes and their prevalence within the data suggests an awareness of patterns and relationships, which is a fundamental aspect of axial coding.

Focused coding

According to Stake (1995), during focused coding, researchers use the initial codes identified or constructed during open coding as key points for further analysis. These codes serve as analytical tools to sift through large volumes of data, facilitating the identification of central themes, patterns, and relationships. By systematically organizing and categorizing the data based on these focused codes, researchers can gain deeper insights into the underlying phenomena and develop a more coherent understanding of the research context. In focused coding, the researcher uses these codes, identified, or constructed as focused codes, to sift through large amounts of data.

During the focused coding phase, we systematically analyzed the qualitative data to identify key themes and concepts that emerged prominently. In our analysis, we identified four overarching parent codes: strategic decision, execution, crosscutting, and future challenges, each representing distinct aspects of the data.

Parent codes and coding hierarchy

The visual representation of parent and children codes identified in the coding process is illustrated in the attached figure “Hierarchy of codes”: The strategic decision, execution,

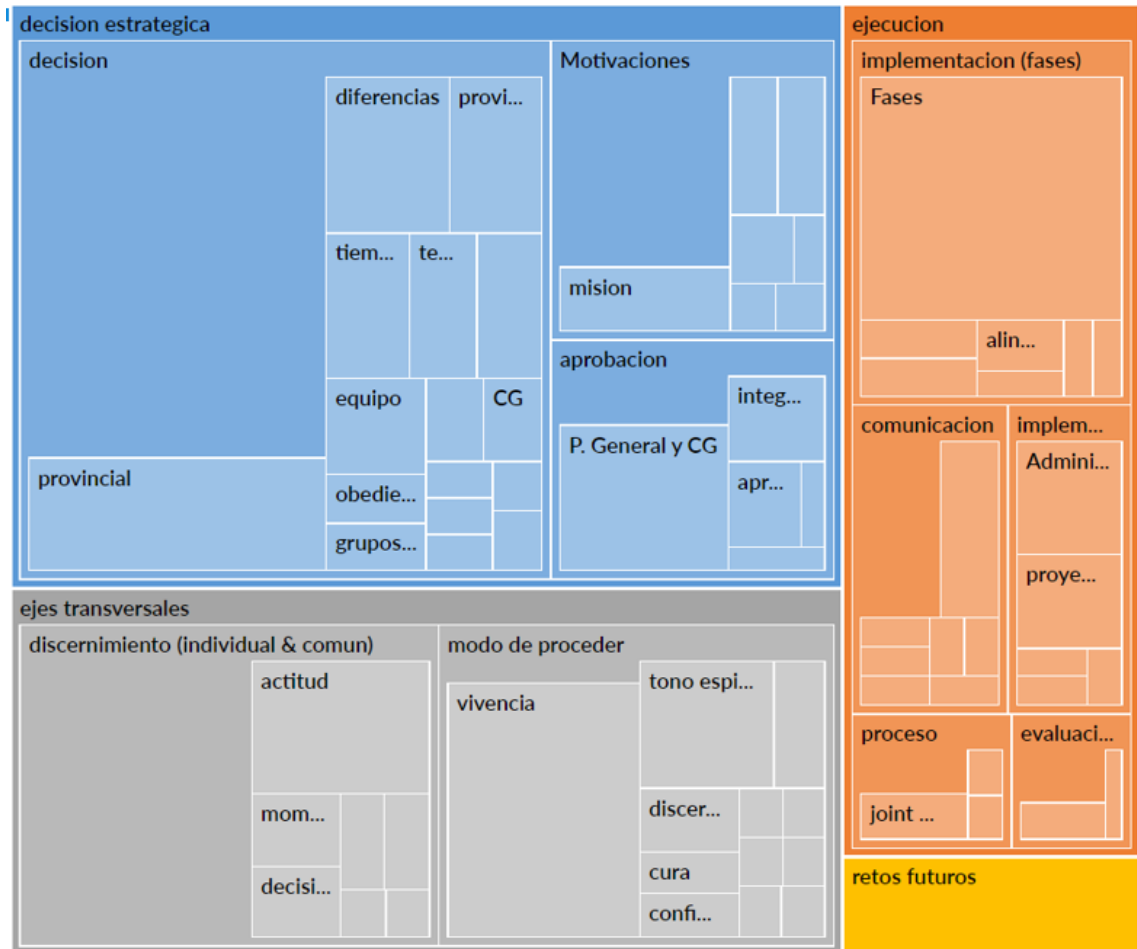


Figure 22 Hierarchy of all codes

crosscutting, and future challenges (the detailed description of the interviews, captured and documented in NVIVO, is in “Annex F: Summary of focused themes, codes, and representative quotes”).

4.4.4. Triangulation

In closing this chapter, in our case study research, inspired by Stake's "The Art of Case Study Research" (1995) a fundamental question drove us: were we constructing the interpretations we sought, and were we exploring alternative explanations with accuracy?

To address this question and ensure the validity of our findings, we employed the technique of triangulation, a cornerstone of qualitative research methodology. (Stake, 1995)

In Table 7, “Triangulation”, we can understand the varying need for triangulation based on the nature of the data. Uncontestable descriptions require minimal confirmation due to their widely accepted accuracy. Dubious or contested descriptions, however, need verification from multiple

Data situation	Need for triangulation
Uncontestable description	Needs little effort toward confirmation
Dubious/contested description	Needs confirmation
Data critical to an assertion	Need extra effort toward confirmation
Key interpretations	Need extra effort toward confirmation
Author’s persuasions, so identified	Need little effort toward confirmation

Table 7 Triangulation

sources to ensure reliability. Data critical to an assertion demands extra effort to confirm, given its importance in supporting key arguments. Similarly, key interpretations require rigorous validation due to their potential subjectivity. Conversely, an author's identified persuasions need little effort toward confirmation, as they are recognized as personal viewpoints. In essence, the effort required for triangulation increases with the data's criticality and potential for dispute, ensuring the credibility and reliability of the information.

Triangulation served as a methodological strategy that went beyond mere intuition and good intentions. It involved the systematic use of multiple data sources or procedures to corroborate and validate the observed data. By triangulating various sources of information, we aimed to establish a robust understanding of the case under investigation and guard against bias or one-sided interpretations (Stake, 1995).

This researcher, meticulously cross-referenced data obtained from interviews and archival records to ensure consistency and reliability of the findings. Regular peer debriefing sessions with fellow researchers allowed us to discuss and challenge the coding structure and interpretations, refining our understanding. He also conducted member checking by sharing preliminary findings with participants and stakeholders to verify accuracy. Employing different research methods, such as qualitative interviews, quantitative analysis of historical data and forward-looking projections, and document analysis, allowing for a comprehensive set of data and corroboration of results through multiple lenses. Expert consultation, including with seasoned professionals and academics, ensured our findings were grounded in sound research

practices. Lastly, an iterative review process enabled us to revisit and refine the data analysis, capturing nuances and enhancing the depth and validity of our conclusions.

In the context of our research, triangulation involved integrating insights from three distinct sources:

- **Qualitative Interviews:** These provided firsthand accounts and perspectives from a comprehensive range of stakeholders directly involved in or affected by the phenomenon under study. Through multiple rounds of open-ended questioning and in-depth conversations with all key stakeholders, we gained nuanced insights that evolved. This iterative process allowed us to capture the complexity of their experiences and perspectives, ensuring a thorough and dynamic understanding of the case. By revisiting stakeholders several times, we could synthesize learnings more effectively and appreciate the subtle shifts and deepened insights that emerged.
- **Academic Source Reviews:** We delved into existing literature, scholarly articles, and academic publications related to our research topic. By synthesizing insights from peer-reviewed sources, we contextualized our findings within the broader academic discourse and identified common themes, contradictions, or gaps in knowledge.
- **Professional Sources Review:** This entailed consulting experts, practitioners, and additional stakeholders with specialized knowledge or experience relevant to the case. By interviewing individuals who could assess the situation from an external perspective yet knew the outcomes of the implemented decisions, we gained a comprehensive evaluation of the case. These additional insights provided practical knowledge, real-world perspectives, and industry-specific nuances, enriching our theoretical understanding. This approach allowed us to evaluate the effectiveness and impact of the decisions more thoroughly, capturing both internal and external viewpoints.

By triangulating these diverse inputs, we aimed to validate our interpretations, refine our understanding, and guard against potential biases or oversights. Triangulation not only enhanced the credibility and reliability of our findings but also fostered a more comprehensive and nuanced analysis of the case.

The triangulation process involved collaborative discussions among researchers, where we collectively examined and refined the coding structure. This approach enhances credibility, as the findings were not solely based on this researcher's perspective. They were rigorously contrasted and validated through engagement with both fellow researchers and seasoned professionals in research and teaching, including relevant authors. Their extensive experience and knowledge contributed significantly to the robustness of our analysis.

In essence, triangulation served as a methodological safeguard, ensuring that our case study research remained grounded in empirical evidence, rigorous analysis, and reflexivity. (Creswell & Poth, 2018)

5. Findings

5.1. Introduction

Following the detailed explanation of the methodology employed in analyzing the interviews, this chapter explores the results obtained during the interpretation phase, aiming to answer the research question comprehensively. The second phase of the research involved conducting additional interviews to triangulate the findings from the initial phase, ensuring the robustness and validity of the results (Stake, 1995).

Hereby we present the key findings from our qualitative analysis of interview data, structured around four main themes: strategic decision, execution, crosscutting, and future challenges.

These themes were selected to comprehensively address the critical aspects of our research question, ensuring a thorough exploration of the data. Strategic Decision focuses on the foundational choices that guide organizational direction and priorities, which are essential for understanding the broader context of our study. Execution examines the implementation processes and actions taken to achieve strategic goals, providing insights into practical applications and effectiveness. Crosscutting themes capture the interrelated factors and influences that span multiple areas, highlighting the interconnectedness and overarching issues impacting the organization. Future Challenges address anticipated obstacles and opportunities, offering a forward-looking perspective that is crucial for long-term planning and sustainability.

Each theme is explored in detail, highlighting specific sub-themes and their relevance to the overall research questions, based on a visual representation of the coding hierarchy to illustrate the relationships between parent and sub-codes identified in NVIVO.

In closing, we introduce the findings related to the constructs of strategy deployment that are the base for measuring the impact of strategic decisions.

5.2. Strategic Decision

When analyzing the speeches of the interviewees we identified three decisive factors within strategic decision: approval, decision, and motivation. Within the parent code of strategic decision, we focused on understanding the processes and considerations related to significant decision-making within the context under study.

The integration of the Spanish provinces of the Society of Jesus in Spain case illustrates a "decision-making process intended to revitalize the Society's mission in Spain," (I. 12) considering the "Difficulty of each Province in carrying out its mission" (I. 12) and the need to "respond to our common demographic decline, and to adapt and improve our provincial government" (I. 12).

Described as a "restructuring with spirit," (I. 1) such a process was a profound organizational and spiritual transformation aimed at revitalizing the Jesuit mission amidst demographic and operational challenges.

Based on the most representative quotes detailed later, the following is a concise summary of the strategic decision factor:

The unanimous decision was made to propose integrating the five Spanish Provinces into one, with a unified apostolic project and a single governance structure. Understanding the integration as a challenge was difficult because it required envisioning the Society's needs 15 years into the future. The integration aimed for greater apostolic effectiveness by adopting new structures and a broader apostolic project, emphasizing the universal mission of the Society of Jesus.

5.2.1. Approval

Approval highlights instances where authorization or consent was sought or granted for specific actions or decisions. Another way to define this factor is described in the following representative quote from the interviews:

Codes	Representative quote	Participants	Ref.
Approval	"... We have unanimously concluded presenting to you, for your study and approval, a project to initiate integrating the five Spanish Provinces into a single Province. A process that must consider, in the first place, the elaboration of a single apostolic project, which also requires, to put it into practice, a single structure of religious and apostolic government" (I. 3)	9	25

The formal and official endorsement was granted by Fr. General Adolfo Nicolás SJ on November 14th, 2008, through a correspondence addressed to Fr. Elías Royón SJ, the provincial of Spain.

In this message, Fr. General emphasized the importance of serving the Church and society to the best of our abilities, ensuring the Society's mission continues with renewed dedication. Fr. General Adolfo Nicolás SJ stated:

"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, I approve the proposal presented, in the development of which it has my support" (I. 5)

Fr. General further characterized the integration process as "restructuring with Spirit," (I. 1) encapsulating its essence. This restructuring encompassed various elements as highlighted by interviewee 3, including the reevaluation of the leadership role of the provincial, the provision of care for the elderly members, and the establishment of Apostolic Platforms, aimed at fostering a dynamic and effective operational framework.

Significant emphasis is placed on the approval and support from higher Jesuit authorities, with quotes from Fr. General highlighting the spiritual and administrative considerations involved in the integration:

"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, I approve the proposal presented in the development of which it has my support." (I. 5)

Also, the General Congregation played a key role in the approval process: "The 35th General Congregation gave clues about identity, community, and mission. That tripod, that is, how do we integrate all of that at this time, in our history, was a very important challenge" (I. 3).

5.2.2. Decision

Decision signifies the act of making choices or reaching conclusions within the dataset. Another way to characterize this factor is illustrated in the following representative quote from the interviews:

Codes	Representative quote	Participants	Ref.
Decision	"What was sometimes difficult was to understand that it was a challenge for us because it was about considering where the Society needed to be in 15 years" (I. 12)	12	89

The integration decision ("The important decision was yes or no.") is ultimately sanctioned by Fr. General ("Fr. General, takes all the risk – he wasn't afraid of the flexibility of the structure.") (I. 5), although the proposal is made and assumed by the Spanish provincial ("the Provincial took the initiative, convinced, produced documents and encouraged.") (I. 5) and backed-up by the table of provincials: "The decision was made at the table of provincials, where the leadership of the Provincial assumes all the risk." (I. 5)

Another key decision, as a consequence of the integration one, was the eventual creation of a delegation of the elderly, also driven by intense and long discernment: "In the field of the elderly and other fields, there was always a participation that was intended to be in the key of discernment – which required an inner freedom that was difficult to attain when the subject concerned you directly." (I. 12)

In the context of such a decision, there were differences there was opposition to the integration. However, the role of the provincial and team of provincials, i.e. table of provincials, generates a dynamic on non-fragmentation, socially counter-cultural: "This is a case that could be extrapolated to... how to generate a non-fragmentation dynamic. Creation of an alliance between the maximum diversity but that happens to prosper. We live in a great deal of fragmentation and this process illustrates something counter-cultural. Suggestive, pretty... even from a social point of view." (I. 12)

Leadership played a crucial role, with provincials coming together to debate, discern, and decide on the best path forward, emphasizing teamwork and shared responsibility: "The decision was made at the table of provincials, where the leadership of the Provincial assumes all the risk" (I. 3, 2021); "It was a common search on the part of the provincials, in a context where not everyone knew each other yet and therefore trust was very necessary. Companionship, magnanimity was needed" (I. 4)

Throughout the decision-making period, upstream stakeholder management is vividly illustrated through several testimonies. One individual recounts their journey to Rome "to favor the play."

(I. 14). Another testimony highlights efforts to convey the decision during visits to the Province and the General Council of Rome, which were consistently praised for their transparency and receptiveness to suggestions from Rome. (I. 14). Additionally, Fr. General's visit to the province is further evidence of the commitment to stakeholder engagement (I. 14)

The integration was described as a strategic decision influenced by past experiences in various countries: "I experienced the integration processes: German-speaking countries, Spain, Italy, and Malta (and later on Romania) – as the Euro-Mediterranean province" (I. 6)

5.2.3. Motivations

Motivations explore the underlying drives or incentives behind actions or decisions identified. This factor is further exemplified by the following representative quote from the interviews:

Codes	Representative quote	Participants	Ref.
Motivations	"Why was this done? For greater apostolic effectiveness. 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." (I. 5)	8	31

The integration decision was driven by the mission itself: "(The integration) It's possible because there's something that's above and beyond diversity, that doesn't cancel it out, but it's there. And that's why it's possible. It is about the fundamentals, which relativizes the works. That intangible is very powerful. Here's what saved us... the mission. We can see together, but we do not ignore our diversity." (I. 5)

Several testimonials delve into the revitalization of the mission as a core motive for the integration, with strategic decisions aimed at enhancing apostolic effectiveness and addressing new challenges facing the Society of Jesus: "(integration) It's possible because there's something that's above and beyond diversity that doesn't cancel it out but it's there. And that's why it's possible. It is about the fundamental which relativizes the works. That intangible is very powerful. Here's what saved us... the mission. We can see together but we do not waste our diversity." (I. 5)

Such a decision aimed to tackle the immediate challenges of each province and prepare for future demands through a common mission and improved governance: "A few notes to remember: - Difficulty of each Province in carrying out its mission - The Need to Discern a Renewed and Common Mission - The need to respond to our common demographic decline - Need to adapt and improve our provincial government." (I. 3)

The assertion of "We're not dying, we're transforming" (I. 5) encapsulates this ethos, acknowledging both moments of decline and opportunities for renewal. Ultimately, the endeavor was undertaken "For greater apostolic effectiveness. 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." (I. 5)

Several quotes reflect a recognition of the need for a unified approach, emphasizing that integration transcends mere structural adjustments, tapping into a deeper mission: "The word that was used was 'integration'... Fr. A. Nicolás SJ used 'restructuring with spirit'. This included understanding: the figure of the leadership of the provincial, the figure of caring for the elderly, creation of the Apostolic Platforms." (I. 3)

The motivations driving the outlined process were threefold: rational, spiritual, and apostolic:

- Rational: "Of strength (growth, defensive strategy that could maintain apostolic vigor over time):
 - o Evident demographic decline in most provinces (aging)
 - o Inability to cope with the mission with structures that demanded a lot of human and material resources.
 - o Sustainability criteria" (I. 5)
- Spiritual:
 - o "At that time, it must be said that we were a bit of prophets because we realized that the number (of Jesuits) was going to decrease terribly, that vocations were not going to increase. This was not a process to increase vocations. We knew what the situation was in the Church, in the vocations of society. So what we looked at was the future, that is, how we're going to respond."
 - o "But there was a spiritual and apostolic foundation of the process to change the (rational) scenario of motivation.
 - o creative innovation (loyalty).
 - o "We're not dying, we're transforming." There will be points of decay but also recreation." (I. 5)
- Apostolic:
 - o "Why was this done? For greater apostolic effectiveness. 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." (I. 5)
 - o "It was clear to the provincials that this was done for the mission, which could not be tackled in the immediate future. It was a question of carrying out an apostolic project for one province. Each one separately, it was not possible." (I. 12)

5.3. Execution

Under the theme of execution, we examined the implementation and operationalization of decisions and strategies within the studied context. This parent code encompasses subcodes such as communication, evaluation, implementation (phases and infrastructure), and process.

The leadership team was tasked with balancing unity in governance with each province's distinct cultural and apostolic needs. Quotes such as "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" (I. 7, 2022) emphasize

the need for a leadership style that involves direct interaction, ongoing dialogue, and the harmonization of various administrative and apostolic platforms.

Fr. General's directives were pivotal, urging the Jesuits to adopt a spiritual dynamic that would enhance their sense of community and response to divine service, reinforcing the integration's alignment with the broader church and societal needs: "I am profoundly convinced that the only objective that has moved you has been the aspiration to proceed in divine service" (Const. 424, 565) and to respond to the apostolic challenge demanded of you by the Church and by changing Society" (Fr. General, 10th September 2010). (I. 5)

A summary of the most representative quotes is provided below:

The integration process emphasized continuous evaluation, advancing the province's incorporation by two years. Key principles since 2008 were transparency, participation, and socialization. Post-decision alignment required improved communication and extensive feedback. Respecting the unique contexts of Catalonia and the Basque Country was a major discussion point, though not universally liked. Participation and the development of a common Apostolic project were crucial in defining the integration process.

5.3.1. Communication

By communication, we understand a focus on the exchange of information or directives within the dataset. One representative quote is the following:

Codes	Representative quote	Participants	Ref.
Communication	"Since 2008, when the integration was announced, the three keywords are: Transparency, participation, and socialization." (I. 6)	6	18

The most significant quotes from the interviews that back up communication deployment strategies are the following:

Following the integration approval, "Since 2008, when the integration was announced, the three keywords are Transparency, participation, and socialization." (I. 6) The communication strategy is, from then on, "that there would be great information on an ongoing basis. That there should always be adequate information to encourage the participation of all." (I. 6), seeking alignment and acceptance: "Symptoms that indicated weakness. There was evidence, which indicated very clearly the way to follow. But it was not accepted." (I. 2)

As a reaction to such a situation, there was a rapid response along the following lines: "Where has been the difficulty or... Where did it come from? Well, let's talk. For example, one of the things I did a lot was the bilateral people-to-people dialogues." (I. 11)

Following the integration approval, “The strategy was that there would be great information on an ongoing basis. That there should always be adequate information to encourage the participation of all.” (I. 14) Such strategy was twofold:

- Upstream: “Fr. General was very well informed: the meeting minutes were shared with him. In return, they (the table of provincials) received feedback from the General Curia.” (I. 4) and
- downstream: “Since 2008, when the integration was announced, the three keywords (“principles”) are: Transparency, participation, and socialization.” (I. 14), backed by hard data: (in the design phase) “Report accurately, clearly, and with clear documents.” (I. 4)

Overall, the objective of the communication was to gain 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.” (I. 14), and the provincial government takes the lead in such a personal way that the process gains momentum: “I also think that the closeness on the part of all of us, those of us who were in governments, provinces, and consultants, explaining the process to maintain that (spiritual) tone in the different communities, in the different institutions, helped. Not only by these means but also the attitudes that made it possible to move forward along these lines.” (I. 14)

Effective communication was pivotal, ensuring transparency and inclusiveness throughout the integration process, critical for the success of the integration: “There would be great information on an ongoing basis...to encourage the participation of all” (I. 6)

5.3.2. Evaluation

The evaluation code implies discussions or considerations related to assessing the effectiveness or outcomes of actions or decisions. One representative quote is the following:

Codes	Representative quote	Participants	Ref.
Evaluation	“Continuous evaluation process, from the beginning. That means that the creation of the province is brought forward by two years“ (I. 9)	3	6

Throughout the described phases, a commitment to continuous and periodic evaluation was upheld: "And to constantly evaluate that the organizational chart, statutes, etc. that nothing is closed, treat it as a continuous process of evaluation." (I. 5)

This emphasis on ongoing assessment aimed to ensure adaptability to emerging needs, address unforeseen challenges, and foster a culture of perpetual learning, as articulated, "We always said that there had to be an annual review to correct deviations, and that was done every year, every sector..." (I. 6)

According to Saunders (2008), learning is essential for navigating the complexities of both soft and hard constructs in organizational development. This involves a constant process of evaluation and adaptation. At its core, learning occurs through a dynamic exchange: "A back-and-forth process with the table of provincials and them, in turn, with their communities." (I. 15)

This iterative exchange fosters the formation of two key entities:

- the commissions of government and
- the apostolic project.

Continuous evaluation serves as a guiding principle, ensuring progress and forward momentum. This commitment to evaluation accelerated the establishment of the new province by two years. (I. 15)

Evaluation is an ongoing attempt, characterized by a perpetual cycle of reflection and refinement: "And to constantly evaluate that the organizational chart, statutes, etc., that nothing is closed, treat it as a continuous process of evaluation." (I. 15) This approach ensures that no aspect remains stagnant, continuously driving the process forward.

Moreover, periodic reviews provide invaluable insights: "We always said that there had to be an annual review to correct deviations, and that was done every year, every sector..." (I. 15) These regular check-ins guide the course of action and enable timely adjustments.

5.3.3. Implementation

Implementation includes two factors: phases and the creation of infrastructure. Phases signify discussions surrounding the phased execution of plans or strategies within the dataset.

- "Phases of the process of 'integration' or 'restructuring with spirit' (Fr. Adolfo Nicolás SJ):
 - o 2008 – 2010: Design
 - o 2010 – 2014: Transition
 - o 2014 – 2017: First Triennium of the New Province" (I. 1).
- Throughout this process, the top priorities were: "Transition begins with formation and vocations, followed by Education (schools), University, Social Apostolate, and Pastoral." (I. 1)

Infrastructure suggests considerations related to the logistical or structural aspects of implementing plans or strategies.

Two representative quotes that summarize implementations are the following:

Codes	Representative quote	Participants	Ref.
Implementation	<p>"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." (I. 9)</p> <p>"I believe that a topic that we debated a lot was respect for the different contexts of mission, 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. I am convinced that many people did not like the creation of territorial apostolic platforms." (I. 12)</p>	11	47

The creation of deployment infrastructure included administrative and legal issues:

- "Precisely because of the apostolic character of the process, administrative matters were left for last." (I. 5)
- "The difficulties came from how to create a legal system." (I. 5)

Developing administrative and legal infrastructures was a key component of the integration, ensuring that operational capabilities supported the strategic vision. This aspect is supported by insights on implementing strategic decisions and the key success factors, including the importance of legal and structural readiness in supporting strategic initiatives. The process faced challenges such as financial disparities: "A former rector of the University of Deusto (Bilbao, Spain) was appointed as administrator. It was a very complex reality, but it was done with great generosity. There were provinces with major economic problems and others with more solid cash positions" (I. 12), and a need for legal restructuring.

It also included the formation of new leaders:

- "We need leaders for this new context of the Society in Spain (and also in the world and particularly in Europe.)" (I. 12),
- "Another element that helped was to train leadership for the new context. We need leaders for this new context of the Society (and also in the world and particularly in Europe.)" (I. 12)

Following the approval of the new province, pivotal decisions were made regarding the governance structure during the transition period: "After the approval of the creation of the new Province, two commissions were created:

- "Apostolic project: comprising one Jesuit from each Province, presided over by the Provincial. It was presented to all the Communities through the Superiors. (A layman brought by the Province of Loyola helped them design the plan.)
- Government of the Province: composed of two Provincials and the Provincial of Spain. Over two years, the designs were shared with all the Jesuits, and all the comments were incorporated. (A lawyer helped them with legal issues.)" (I. 12)

The implementation phase is characterized by the directive to "Prepare and facilitate the transition of the government of five to that of a single Province. And enabling the progressive implementation of the Apostolic Project," (I. 3) unfolded through the development of several pivotal documents, each revolving around the overarching themes of vision, mission, organization, planning, and governance: "Contemplation of the Reality to which we are sent" (July 2009), including:

- Revitalizing the Life and Mission of the Apostolic Body
- Apostolic Project
- Governance Structure for the Transition Phase Governing Structure for the New Province

5.3.4. Process

The process implies discussions surrounding the procedural aspects of executing plans or strategies.

Codes	Representative quote	Participants	Ref.
Process	<p>“Another element that helped (the process) was participation.</p> <p>And also, the elaboration of a common Apostolic project. That defined us a lot, and not the legal structure.” (I. 12)</p>	1	8

Participation was based on the elaboration of a common apostolic project that, unlike the new legal structure, “defined as (Jesuits), a lot” (I. 12)

Furthermore, other groups of interest, particularly the Jesuits, not only accept and adopt the integration decision but also actively contribute to the development of a new apostolic project, which serves as the cornerstone of the new province:

- The formulation of the Apostolic project involves delegates from each province. (I. 2)
- Another significant element facilitating the process is broad participation. (I. 12)
- Moreover, the elaboration of a common Apostolic project emerges as a defining aspect, shaping the identity of the new province more than mere legal structures. (I. 4)

However, the journey thickens with the introduction of mechanisms designed to fuel the process and ensure harmony with the decision and design phase. Among these mechanisms is the fostering of apostolic interactions, a subplot where the leadership of community superiors takes center stage. Their role becomes pivotal as they are entrusted with guiding the Society's mission in local contexts: "The center of authority was the local superior, who was given competence in community leadership, and asked how to help the Society of Jesus in the local context." (I. 4)

A serious attempt is made to heal the wounds of an overly sectorized Society, where universities, parishes, and communities once stood in isolation, disconnected from one another. Through inculturation efforts, the aim is to reignite apostolic vitality and bridge these divides: "An attempt is made (with a great effort of inculturation) to heal the apostolic vitality and an excessive vectorization of the Society (e.g. universities, parishes, communities... They didn't talk to each other; they didn't even know each other)." (I. 4)

The strategic adaptation to diversity was also supported by insights on reflective practice, emphasizing continuous reflection to enhance organizational learning and strategic execution. The diversity among the provinces was noted by an interviewee: "There was a diversity of provinces some of them very weak. The strong ones, however, did not see the need for integration" (I. 6)

The process acknowledged the diversity within the provinces, aiming to create a dynamic that prevents fragmentation and promotes unity while respecting individual peculiarities: “This is a case that could be extrapolated to... how to generate a non-fragmentation dynamic. Creation of an alliance between the maximum diversity that manages to prosper. We live in a great deal of fragmentation and this process illustrates something counter-cultural” (I. 3)

Respect for diverse cultural and linguistic backgrounds was crucial, particularly in how provinces like Catalonia and the Basque Country were integrated, ensuring that local identities were maintained and respected: “I believe that a topic that we debated a lot was respect for the

different contexts of mission, that is, what were the peculiarities of Catalonia and the Basque Country, with their specificities, in terms of language and cultures” (l. 12)

5.4. Crosscutting

Under the parent code of crosscutting, we identified themes and concepts that transcended traditional organizational boundaries or categories. This parent code encompasses subcodes such as discernment (individual & common) and way of proceeding.

- Discernment (Individual & Common): Referenced in 10 files with 52 references, this subcode denotes discussions or considerations related to individual and collective processes of discernment within the dataset.
- Way of Proceeding: Found in 4 files with 51 references, this subcode suggests discussions surrounding the methods or approaches adopted in addressing challenges or making decisions within the dataset.

The most representative quotes of this theme’s codes are captured in the following table:

Codes	Representative quote	Participants	Ref.
Discernment	“Therefore, the decision falls on the leaders of the provinces of Spain. It is not totally democratic but loaded with a lot of discernment when deciding.” (l. 8)	9	51
Way of proceeding	“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, that is, the care of the person and the care of the mission.” (l. 12)	3	49

The following is a summary of the quoted statements:

The decision ultimately rested with the leaders of the Spanish provinces, emphasizing discernment over a purely democratic process. A significant challenge was ensuring that the new government balanced personal care with apostolic mission responsibilities.

5.4.1. Way of Proceeding

Amidst numerous challenges and prevailing uncertainties, key figures involved in the case expressed a profound sense of hope and transcendence. As articulated, "I lived it 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." (I. 10)

Additionally, another participant conveyed, "I lived it (the decision-making process) with enthusiasm and hope. Because it was facing a new future that the Society of Jesus had before it. And it was very important to me to revitalize the vision, the life and mission of the Society." (I. 12)

Specifically, the integration of provinces and the establishment of a delegation for the elderly emerged as critical considerations, guided by the overarching mission imperative: "We had to discern whether those difficulties could be resolved without deviating from the mission." (I. 6)

5.4.2. Discernment

The following quotes illustrate the deliberate and discerned nature of the decision-making process: "Discernment can sometimes be confused with a method. In discernment, the most important thing is not the method, but rather the attitudes, first of inner silence in which there are no prejudices, there is no protagonism, I do not want to carry out my idea, therefore, I am in inner silence" (I. 10), which guided decision-making processes to align with the broader mission and values of the Society of Jesus.

Nicolás (2009) and Sosa (2017) offer insights into DC, underlining the importance of collective spiritual reflection, a theme echoed in the coming quotes about group prayer and shared spiritual experiences influencing strategic decisions: "But there was common prayer too. Today when we do DC, we get together and pray. At that time this was not so present. What was present is that 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" (I. 12), "Each Provincial tried to carry out a process with their consultation. Then, all the Provincials made DC" (I. 12), "... Discernment helped us a lot... Let us feel, and live. What's going on, where are we going, where is (the Spirit) blowing us now?" (I. 6)

These narratives exemplify a distinctive approach characteristic of the Society of Jesus, where discernment plays a pivotal role. As elucidated, "... Discernment helped us a lot... Let us feel, live. What's going on, where are we going, where is (the Spirit) blowing us now?" (I. 12)

Such emphasis on discernment stresses a deeply ingrained practice within the Society, guiding its members to perceive and respond to the movements of the Spirit with sensitivity and purpose. The overarching aim is to align with the divine will: "We were aware that we were seeking what God wanted and that was discernment (in common), but not (aware of) as to the (explicit) method." (I. 11)

Moreover, discernment is portrayed as more than a mere process; it embodies a fundamental disposition characterized by active listening, readiness for personal transformation, and a recognition of the transcendent nature of the decisions at hand: "Discernment is fundamentally an attitude: listening to others; change my position; What we are deciding is above and beyond us." (I. 6)

5.5. Future Challenges

Finally, under the parent code of future challenges, we anticipated and examined potential obstacles or difficulties that may arise in the future within the studied context. Although no specific codes were identified, this theme signifies a proactive approach to understanding and addressing challenges that may impact the organization or individuals in the future.

Codes	Representative quote	Participants	Ref.
Future challenges	<p>“The people who are carrying the weight of the Province, I believe, are happy (with the integration). Things are being done, we have gone through and continue to go through strong crises and the province is resisting. I believe that on many occasions better than other institutions like ours.” (I. 13)</p> <p>“It is still pending how to continue the process of collaboration in the mission-shared mission -. It is a fact that is happening, but, at the same time, some Jesuits do not see that it has been sufficiently clarified although the majority work in collaboration. Furthermore, among lay collaborators the diversity is enormous and work remains to be done in this sense.” (I. 15)</p>	5	15

The following is a summary of the quoted statements:

The leaders of the province are generally satisfied with the integration, noting resilience through crises and better performance compared to similar institutions. However, the process of collaboration in the shared mission is ongoing, with some Jesuits feeling it lacks clarity and acknowledging the diverse and substantial efforts needed among lay collaborators.

5.5.1. Apostolic works

There is a sense of enthusiasm and adaptation among the younger generation regarding the integration process within the Society. Despite concerns about the weight of institutional structures, there's a prevailing belief in the viability of the institutions and their role in supporting the province's projects - "I believe that my generation and the younger ones welcomed it..." (I. 13)

This sentiment is echoed by the observation that those shouldering the province's responsibilities remain steadfast and resilient, navigating through crises with relative success - "The people who are carrying the weight of the province..." (I. 13)

They acknowledge, however, the weight of managing numerous institutions with a decreasing number of Jesuits: "The weight of the institutions crushes us because we are going to be very few with many institutions", "there is almost no reduction in apostolic works despite the reduction in Jesuit numbers" (I. 13)

5.5.2. Vocations

This juxtaposition prompts reflection on the complexities of vocations, particularly the emergence of lay vocations alongside perceived shortages in traditional Jesuit vocations - "A curious thing that I still believe we have not internalized sufficiently..." (I. 14)

The impact of lay vocations highlights a shift in Jesuit presence. This duality is captured in statements like, "There is a kind of double language that means that we still do not have it integrated," reflecting identity ambiguities but also acknowledging the apostolic vigor and contribution of laypeople. The challenges of balancing lay and Jesuit vocations are apparent: "There is a confirmation of poverty among members of Jesuit Communities," and yet "there are lay vocations." (I. 14)

5.5.3. Identity

Moreover, there's a discernible tension between the perceived identity of the Society and the reality of its organizational structures.

While there's a sense of apostolic vigor, there's also an acknowledgment of identity ambiguity and organizational challenges - "I believe that there is a certain identity ambiguity here..." (I. 13).

This ambiguity is further compounded by the need for rational-structural adjustments, juxtaposed against the imperative of personal and spiritual integration: "The rational-structural aspects were accentuated..." (I. 15)

The call for a true apostolic and Ignatian platform distinct from an NGO or school association emphasizes the need for spiritual grounding: "The heart is the Gospel of Jesus Christ." (I. 16)

5.5.4. Organizational Structure

Issues such as local coordination, sectoral organization, and institutional collaboration pose formidable challenges - "A problem of great complexity arose..." (I. 16). These challenges extend to sector-specific integration efforts, where issues of collaboration and cooperation remain prominent: "EDUCSI is the large sector that was already created in 2014..." (I. 16)

Networking and collaboration within the province remain theoretical ideals yet to be fully realized: "Networking is something that is not clear and that is formulated very well theoretically, but in practice, it remains to be done within the province" (I. 14)

5.5.5. *Cura Personalis, Cura Apostolica*

The emphasis on *cura personalis* and *cura apostolica*, along with the need for deeper integration of personal and spiritual aspects, has been highlighted: "The role of the superior in *cura personalis* can grow much more." (I. 15)

There's a call for its deepening and integration into the apostolic endeavors of the Jesuits, necessitating a reevaluation of roles and responsibilities within the order - "the *cura personalis-cura apostolica* or the role of the Jesuit..." (l. 16)

5.6. Constructs of Strategy Deployment

The findings from the first and second phases of the research are discussed and contextualized using Saunders' constructs (2008). This theoretical framework is critical for our study as it enhances our understanding of strategy deployment and its implications. By applying Saunders' constructs, we gain deeper insights into the relationships between themes and codes derived from our data, allowing us to form hypotheses that integrate into a cohesive theory. (Thornberg & Charmaz, 2014)

In essence, these constructs provide a set of analytic tools and perspectives that we can use to interpret our data. Theoretical codes represent the underlying logic found in pre-existing theories, which must be applicable, relevant, and aligned with the data and the categories generated and refined through our research. (Glaser & Strauss, 1967). Understanding these constructs is essential for comprehensively analyzing strategy deployment within the organizational context, offering a structured approach to interpreting our findings and their broader significance.

Saunders (2008) proved the validity of the constructs outlined in Figure 23, "Constructs of strategy deployment", and the links between them, representing the ongoing evaluation and adaptation of the strategy as events unfold during deployment. He qualified the constructs into

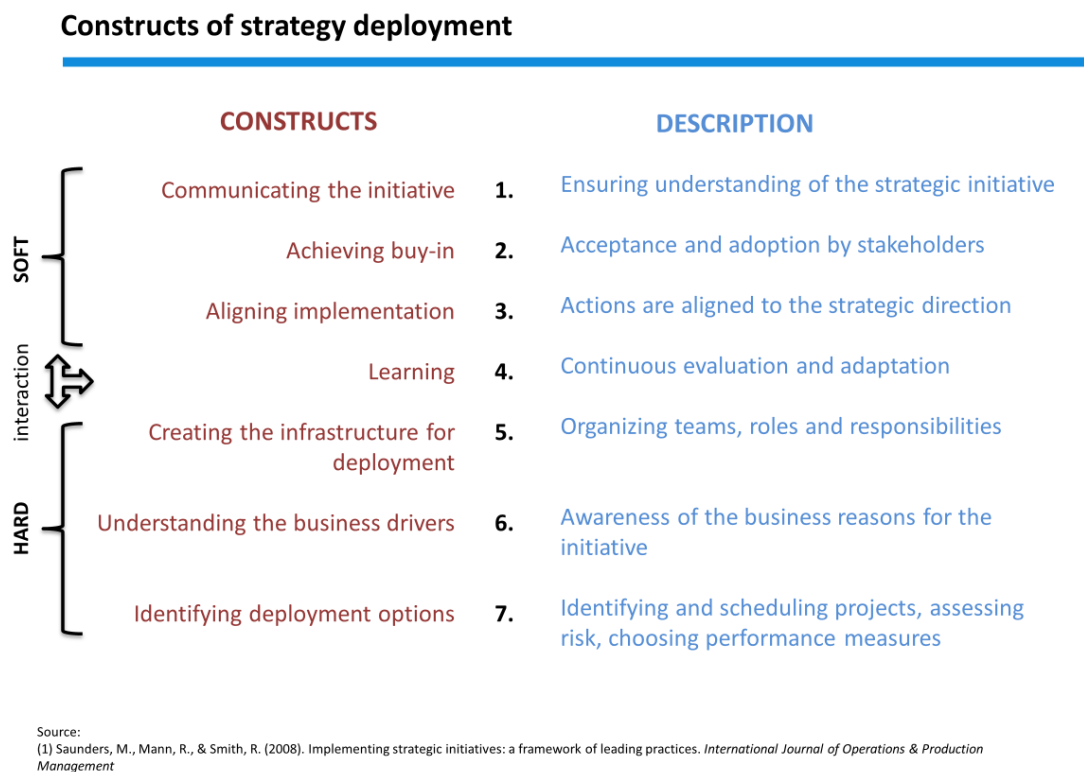


Figure 23 Constructs of strategy deployment

the following categories:

- Soft practices encompass communicating the initiative, achieving buy-in, and aligning implementation. Soft or behavioral dimensions involve the perception of information, structural and cultural fit, power and influence dynamics, communication, commitment, encouragement, and support, all based on judgment.
- In contrast, hard practices involve creating the infrastructure for deployment, understanding strategic decision drivers, and identifying deployment options. Hard practices include information gathering, analysis, evaluation, action and project planning, monitoring, and controlling, all based on data.
- The construct of "learning" stands alone, interacting with all other soft and hard constructs, and focuses on the continuous evaluation and adaptation of strategy deployments.

The purpose of the questionnaire that Saunders (2008) developed for managers was to study and understand the perceived importance and effectiveness of various strategy deployment practices. He designed the questionnaire to gather detailed insights from managers with strategy deployment responsibilities about their experiences and the practical challenges they faced.

By analyzing the responses, Saunders aimed to identify best practices and potential areas for improvement in the implementation of strategic initiatives. This research provided valuable data to enhance the understanding of effective strategy deployment in organizational settings.

To adapt Saunders' constructs of strategy deployment for our research and measure the impact of DC on strategic decisions, we identified the relationships between the original constructs and the themes and sub-codes identified during the interviews. The results are illustrated in Figure 24, "Constructs and (Sub)codes."

Relationship between constructs of strategy deployment (literature review) and (sub) codes from interviews

	CONSTRUCTS	CODES	SUB-CODES
SOFT	1. Communicating the initiative	2. communication	(2) shared diagnosis, dialogue, strategy, Fr. General, principles, reporting
	2. Achieving buy-in	3.6.10 decision, implement. (infr.), process	(3) stakeholders (6) apostolic project (10) joint work, participation
	3. Aligning implementation	2.7. communication, implementation (options)	(2,7) alignment (7) apostolic interaction
interaction	4. Learning	5. evaluation	(5) continuous and periodical evaluation
HARD	5. Creating the infrastructure for deployment	6.7. implemenation (infr. & options)	(6) admin, legal, formation (7) commissions
	6. Understanding the business drivers	9. motivations	(9) motivations
	7. Identifying deployment options	7. implemenation (options)	(7) phases

Source: own elaboration based on
 (1) Saunders, M., Mann, R., & Smith, R. (2008). Implementing strategic initiatives: a framework of leading practices. *International Journal of Operations & Production Management*

Figure 24 Constructs and (Sub)codes

For instance, the original construct of Communicating the Initiative aligns with our communication code category. This alignment is supported by several sub-codes, including shared diagnosis, dialogue, strategy, Fr. General, principles, and reporting. Another key construct, Achieving Buy-In, was evident through the themes of commitment and support. The Construct of Learning also played a significant role in our findings. The continuous evaluation and adaptation of strategy deployments were frequently mentioned.

5.6.1. Measurement of the Impact of DC on Strategic Decisions

The following section summarizes Saunders' (2008) Measurement constructs and highlights the key aspects of measuring and evaluating strategic decisions, effective communication, stakeholder management, implementation alignment, infrastructure for deployment, and continuous evaluation and learning. These constructs support the benefits of DC in the strategic decision-making process for integrating the Spanish province of the Society of Jesus.

Measuring the impact of strategic decisions is crucial for assessing the efficacy and relevance of organizational strategies. Frameworks for evaluating organizational impact help identify key performance drivers and assess the effectiveness of strategic initiatives, enabling continuous improvement and development. The constructs used to measure the quality of the strategic decision made, significantly support the benefits of DC in the strategic decision process of integrating the Spanish province of the Society of Jesus.

Communication

Effective communication was crucial throughout the integration process, with a strong emphasis on transparency, participation, and socialization to ensure stakeholders were well-informed and aligned with the initiative. The strategy involved continuous communication, both upstream to the General Curia and downstream to all levels of the province, to maintain transparency and gather feedback. DC enriched this communication process by fostering a culture of shared understanding and collective decision-making. It encouraged an environment where voices from all levels could be heard and valued, enhancing the quality of information shared and ensuring that diverse perspectives were considered. This approach not only improved communication channels but also deepened the engagement and commitment of stakeholders by involving them in the discernment process.

DC promoted active listening and reflective dialogue, which are key components of effective communication. Facilitating open discussions, allowed for the integration of feedback in a meaningful way, ensuring that the communication was not just top-down but also responsive to the concerns and insights of the wider community. This participatory approach helped align stakeholders by creating a sense of ownership and shared purpose in the integration process.

This strategic communication was essential to manage the integration effectively. It aligns with literature that highlights the role of effective communication in facilitating strategic initiatives (Benefiel, 2005; Coghlan, 2005; Saunders et al., 2008), and further underscores the importance of inclusive and reflective practices in enhancing the clarity and impact of communication efforts.

Stakeholder Management:

Stakeholder engagement was essential in the decision-making process, ensuring that the perspectives and feedback from Roman Curia and local stakeholders were considered. Efforts to convey decisions during visits and meetings were integral to this process, facilitating a two-way

communication flow. The role of the provincial and the table of provincials was critical in generating a dynamic that prevented fragmentation and promoted a counter-cultural alliance, fostering unity despite opposition. (Saunders et al., 2008)

DC enriched stakeholder engagement by fostering a deeper sense of involvement and co-ownership among stakeholders. This approach emphasizes collective reflection and shared decision-making, encouraging stakeholders to actively participate in discerning the best path forward. By involving a broad spectrum of voices, DC ensures that the engagement process is inclusive, considering all participants' diverse needs, concerns, and insights.

Trust and transparency were built through DC, as stakeholders felt that their contributions were valued and genuinely considered. This participatory approach improved the quality of decisions by incorporating diverse perspectives and enhanced the legitimacy and acceptance of decisions made. Stakeholders were more likely to support and commit to decisions they had a role in shaping, reducing resistance, and fostering a unified approach.

The emphasis on dialogue and reflective listening in DC also helped to identify and address potential conflicts early, promoting a collaborative environment. This was crucial in preventing fragmentation. By prioritizing the common good over individual interests, DC aligned stakeholders around shared values and objectives, reinforcing the unity and cohesiveness of the initiative.

Implementation Alignment:

Post-decision alignment required enhanced communication and extensive feedback to ensure that all activities and resources were directed toward achieving the desired outcomes. Continuous evaluation was emphasized to adapt to emerging needs and maintain alignment with the strategic goals. Periodic reviews and a commitment to ongoing assessment ensured that strategies were refined and improved over time. Learning was facilitated through a dynamic exchange between the table of provincials and their communities, fostering continuous feedback and adjustment. DC enriched this post-decision alignment process by embedding a culture of collective reflection in ongoing evaluations and adaptations. This approach emphasizes the importance of regularly revisiting decisions and strategies in light of new insights and changing circumstances, ensuring that the organization remains responsive and adaptable.

The emphasis on continuous learning and adaptation inherent in DC aligns closely with the concept of post-decision alignment. It fosters an environment where ongoing assessment is not just a procedural requirement, but a meaningful practice aimed at genuine improvement. This ongoing dialogue and reflection help to identify gaps, anticipate challenges, and seize opportunities for innovation and enhancement.

Furthermore, the integration of DC into the post-decision process facilitated a shared sense of responsibility and ownership among all members of the community. By involving various levels of the organization in the evaluation and adjustment process, it ensured that changes were broadly supported and aligned with the collective goals.

Continuous Evaluation and Learning:

The integration process involves constant evaluation and adaptation, facilitated by a dynamic exchange of ideas and feedback. This iterative approach ensured that the integration remained responsive to evolving needs.

Infrastructure for Deployment:

The creation of deployment infrastructure involved addressing administrative and legal challenges and forming new leadership suited to the new context. Commissions for the apostolic project and the government of the province were established to manage the transition and implementation phases effectively. DC enriched such a process by fostering a collaborative and reflective approach to decision-making and planning, emphasizing the collective input of diverse stakeholders, and ensuring that the infrastructure built is not only functional but also aligned with the community's values and goals.

Through DC, the establishment of commissions and leadership structures was approached with a heightened sense of inclusivity and engagement. By involving a wide range of voices in the planning process, the resulting infrastructure was more likely to address the needs and concerns of various groups within the organization.

The approach also enhanced the flexibility and adaptability of the deployment infrastructure. By encouraging ongoing dialogue and reflection, DC ensured that the infrastructure could evolve in response to new insights and changing circumstances.

Motivations Behind Integration

The term "restructuring with spirit" underscores the integration's spiritual and organizational dimensions.

The integration aimed at responding to demographic decline, unsustainable resource demands, and the need for greater apostolic effectiveness. Understanding these organizational drivers was essential for making informed strategic decisions. The motivations for the integration included rational, spiritual, and apostolic drivers, highlighting the necessity to enhance apostolic effectiveness and address new challenges. Stakeholders engaged in a collective dialogue through DC, deepening the analysis of these drivers and ensuring that decisions aligned with the organization's core values and mission. This approach balanced practical considerations with the qualitative aspects of mission fulfillment, fostering strategies that were both effective and spiritually grounded.

The interviews reveal that strategic decisions were not only about structural changes but also about enhancing spiritual and apostolic efficacy. This was echoed in the approval and motivations underlying the integration process, where strategic decisions were deeply interwoven with spiritual discernment. (Mintzberg et al., 1976; Tetlow, 2021). DC enriched these decisions by integrating a reflective and spiritually grounded process, ensuring that choices were aligned with the organization's mission and values, and involving collective reflection and dialogue, allowing for a deeper understanding of the implications of strategic decisions. It ensured that decisions were not solely driven by pragmatic considerations but also reflected a commitment to the community's spiritual and apostolic goals.

Structured Deployment Phases

A well-defined plan with clear phases from design to transition ensures coherent execution. This methodical approach accelerated the process and reinforced the strategic decision. The integration was executed in distinct phases (design, transition, first triennium), each tailored to specific strategic needs. This structured approach ensured continuous evaluation and adaptation, reflecting the principles of continuous improvement and alignment with strategic objectives.

6. Discussion

Considering the preceding findings, this chapter first introduces the relationship between discernment, organizational strategy, and spirituality.

Later, we discuss the research discoveries relative to DC (García de Castro, 2017) and organizational strategy (Planellas & Muni, 2019).

Next, we debate about the Impact of DC on Strategic Decisions, in the context of the Integration of provinces of the Society of Jesus in Spain (Saunders, 2008).

Lastly, the focus moves to contemplative practices in management (Delbercq, 2016) and how to improve continuous learning, evaluation, adaptation (Falque, 2004; Traüffer, 2010), and decision-making (Benefiel, 2008).

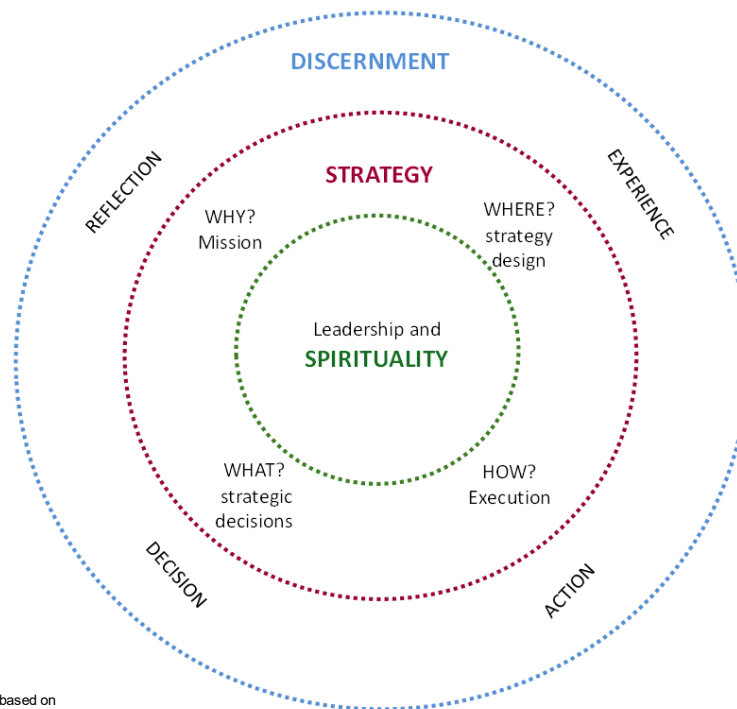
To provide a clear and structured analysis, we will use the model "The Circles of Discernment, Strategy, and Spirituality," as depicted in Figure 25, as our guiding framework. This model, when integrated with Saunders' (2008) Constructs serves as a robust tool to measure the impact of strategic decisions through execution practices, emphasizing the intertwined nature of leadership, spirituality, and strategy.

This model captures the core elements of Leadership and Spirituality at its center, illustrating how these foundational aspects inform and guide the broader strategic processes. The framework effectively integrates these spiritual and leadership principles with the critical phases of strategy, including Mission Definition (Why?), Strategy Design (Where?), Strategic Decision-Making (What?), and Execution (How?).

Furthermore, the model emphasizes the continuous cycle of Discernment, Reflection, Decision, Action, and Experience that ensures a holistic approach to understanding the impact of DC on strategic decisions. This cyclical process reflects the ongoing nature of strategic leadership within a spiritual context, where reflection and experience continuously inform future decisions and actions, creating a dynamic and adaptive strategic environment.

The integration of the Jesuit provinces process, examined through interviews, literature

The circles of Discernment, Strategy, and Spirituality



Sources: own elaboration based on Planellas & Muni (2019), Rambla & Lozano (2019), Tellow (2016).

Figure 25 The Circles of Discernment, Strategy, and Spirituality

reviews, and theoretical frameworks, reveals critical insights into how strategic decision-making, spiritual discernment, and leadership practices converge to drive organizational transformation. The topics discussed herein are structured around a comprehensive model that underscores the interplay between discernment, strategy, and spirituality.

6.1. Organizational Strategy

Addressing the key inquiries when formulating an organizational strategy (where, what, how, and why) requires a structured approach, as proposed by the strategic decision circle model developed by Planellas (2019): analysis, decision-making, and implementation. We can draw a parallelism between this model and the case of the integration of the Spanish provinces of the Society of Jesus in Spain.

The decision to integrate all the provinces of the Society of Jesus in Spain into one single proto-province is considered strategic. According to Johnson (2008), they are complex, requiring multiple considerations and thorough analysis, are taken in situations of uncertainty, affect daily operational decisions, and need a holistic approach inside and outside the organization. Furthermore, they require significant commitments in terms of actions taken, resources allocated, and precedents established (Mintzberg et al., 1976).

The implementation phase, which coincided with the design phase of the provinces' integration process, translates strategic decisions into actionable initiatives. This stage involves cascading strategic objectives throughout the organization, delineating roles and responsibilities, and

establishing mechanisms for monitoring progress and adapting to unforeseen circumstances. (Bradach, 1996; Kaplan & Norton, 2000; Kotter, 2007)

Recent works have provided comprehensive frameworks of leading practices for implementing strategic initiatives, consolidating previous research's learning (Saunders et al., 2008), and offering actionable insights for practitioners (Tawse et al, 2021): How managers influence the implementation process; conditions for strategy implementation effectiveness, and managerial capabilities to create actions.

The integration addressed significant diversity among the provinces, aligning with Aaltonen and Ikävalko's (2002) discussion on the necessity of adaptive strategies in organizational structures to meet complex challenges.

The approach taken here also aligns with Okumus' (2001) view towards a strategic implementation framework, which emphasizes understanding and integrating the complexities of various organizational sectors. This is akin to the quotes' emphasis on a discernment process that respects and integrates the organization's members' diverse cultural and spiritual backgrounds.

The mission-centric approach in redefining the strategic direction during the integration aligns with the works of Cardona and Rey (2022), emphasizing that aligning organizational activities with a clear mission statement is crucial for maintaining strategic focus and ensuring organizational coherence.

In Figure 26 there is a summary of the strategy context, the measurement of the strategic impact, and the pattern in a stream of decisions. The "The Circles of Strategy Context, Measurement, and Patterns of Adaptation", is built based on evidence from the case study and illustrates that a successful strategy must be contextual, measurable, and adaptable, with each layer influencing and supporting the others.

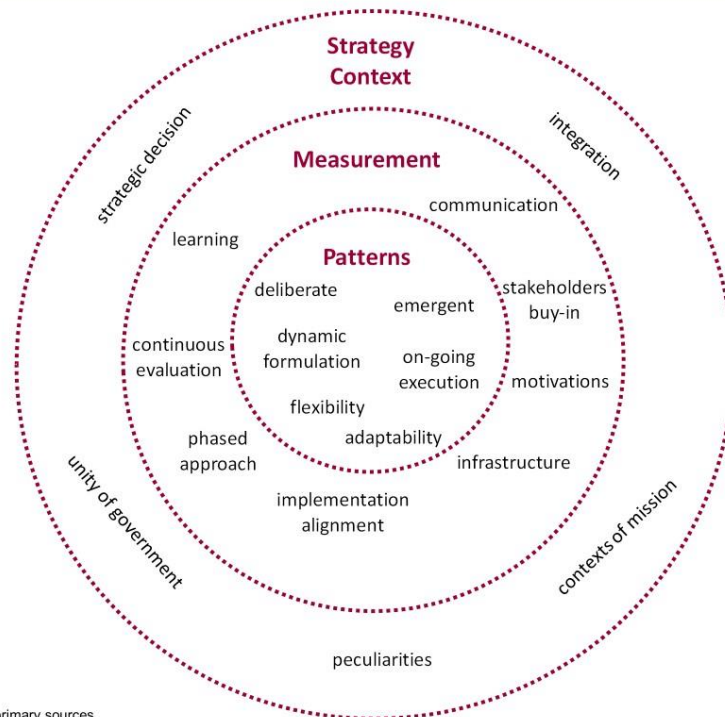
The outermost circle identifies the broader "Strategy Context." This layer includes strategic decisions, the integration process, unity of governance, and alignment with the context of the mission and local peculiarities.

The middle circle focuses on "Measurement." It includes elements like communication, stakeholder buy-in, continuous evaluation, motivations, and infrastructure. This layer assesses how well the strategy is being implemented and how it is perceived by stakeholders.

The innermost circle, labeled "Patterns," emphasizes the specific approaches within the strategy. It includes terms like deliberate versus emergent strategies, dynamic formulation, ongoing execution, flexibility, adaptability, and implementation alignment. This layer addresses how strategies evolve and adapt over time, ensuring they remain effective in achieving their goals.

A proof point of such effectivity is the fact that the 229 works of the Society of Jesus in Spain in 2017, including education, social justice, spiritual accompaniment... even scientific research and theological reflection, "there is (in 2024) almost no reduction in apostolic works despite the reduction in Jesuit numbers" (see Table 2 "Apostolic Works of the Society of Jesus in Spain (2017)"). Furthermore, the incorporation of a new Jesuit University in Spain (Advantere, located in the recently inaugurated "Arrupe Campus" in Madrid), proves the vigor of the joint mission carried out between Jesuits and laypeople, and evolving and adapting strategies (i.e. patterns) that the integration process has brought forward.

The Circles of Strategy Context, Measurement, and Patterns of Adaptation



Sources: own elaboration based on primary sources

Figure 26 The Circles of Strategy Context, Measurement, and Patterns of Adaptation

Strategic Decisions and Context

Strategic decision: integration of provinces, guaranteeing the unity of government, with the territorial, cultural, and linguistic peculiarities. This is to align with GC35, that in the face of unequal contexts of mission, the Society must adapt the way of proceeding in government at all levels.

The integration required flexible strategies to manage diversity and ensure cohesive functioning across various units. This approach aligns with the need for adaptive strategies in complex organizational structures.

The integration was characterized by ethical deliberations, where decisions were weighed against Jesuit values and the overarching mission. This reflects the broader literature on leadership and ethics, emphasizing the role of discernment in fostering ethical decision-making.

The design phase (2008-2010) starts with creating a government commission and an apostolic project commission. The result of their work was brought into close relationship, so that the Apostolic Project was attentive to the peculiarities of each area in its feeling and living, corresponding to an adequate government model, and with the assumption that the more respect given to the differences, the better contribution to the unity of the Society.

Measurement

The research findings, as seen in the previous chapter, confirm Saunders' (2008) Constructs that propose adopting and implementing the right management practices and deployment

frameworks to attain “world-class” performance. For his research, this meant that these organizations used a recognized business excellence model with which they assessed and improved their performance.

The seven strategy deployment constructs (2008) were measured throughout the interviews and brought evidence that the integration decision and the process followed, pivoting around DC, portrayed as more than a mere process but embodying a fundamental disposition characterized by active listening, readiness for personal transformation, and a recognition of the transcendent nature of the decisions at hand.

The constructs used to measure the quality of the strategic decision made, significantly support the benefits of DC in the strategic decision process of integrating the Spanish province of the Society of Jesus.

Pattern

In the academic literature, strategy is viewed as a pattern in a stream of decisions, incorporating both deliberate and emergent elements (Mintzberg & Waters, 1985). This perspective emphasizes the dynamic nature of strategy formulation and execution, recognizing the interplay between planned actions and unplanned outcomes. It highlights the need for flexibility and adaptability in strategic processes.

6.2. Discernment in Common

According to Fr. P. H. Kolvenbach SJ, Superior General of the Society of Jesus (1983-2008), DC refers to the shared pursuit of understanding God’s will, knowing his desires and his purpose for the local community in fulfilling its mission (de Vera, 2007), which drives the integration decision of the Spanish provinces of the Society of Jesus.

Our findings highlight that DC was key in seeking God’s will throughout the decision process. However, DC was carried out as an attitude rather than an explicit method as defined by García de Castro. (2017). Furthermore, the strategic decision to integrate the provinces ultimately rested with the leaders of the Spanish provinces, emphasizing discernment of that group over a purely democratic process including the entire Society’s members in Spain.

In the opinion of Fr. Adolfo Nicolás SJ, Superior General of the Society of Jesus (2008-2016), the DC is a slow process; slow and real. There is no instant insight. As Saint Ignatius said, it is true that in some cases, we receive a sudden light (de Dalmases, 1990), as happened to Saint Paul on the road to Damascus. However DC is different, its nature is search, and search is a process that takes time (Nicolás, 2009). It is characterized by several key principles, accentuating the importance of consultation and communal processes (Nicolás, 2009).

In the integration case of the Spanish provinces, the three phases following the decision went from 2008 until 2010 for the Design; from 2010 until 2014 for the Transition; and from 2014 until 2017 for the First Triennium of the New Province. The integration decision process as such started in 2006 and lasted for a of couple years. In total, from 2006 until 2014, it took eight years to officially establish the new province.

Just recently, the Spanish Curia of the Society of Jesus launched a public evaluation (Jesuitas España, 2024) of the new province’s first decade (2014-2024), confirming the fact that the integration is, like DC, “a slow process; slow and real” (Nicolás, 2009). The video describes the initial process; intuitions and right guesses; errors; how to consolidate the sense of one sole province; unity in diversity; adaptation to changes in society and the Catholic Church; future

challenges; learnings; and personal experiences of the last three provincials: Fr. F. J. Ruiz SJ; Fr. A. España SJ; and the current provincial Fr. E. Puiggròs SJ.

Such comprehensive and open evaluation ten years after the establishment of the new province reinforces Fr. A. Nicolás' intuition that DC is slow (2009) and confirmations only come after a long period. In our case, ten years (2014-2024).

DC presupposes 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, J., 2008). Personal discernment looks within to personal interiority for these movements. These previous conditions were widely seen in our research since in the Jesuit tradition, discernment is regarded as a cornerstone of leadership, fostering a culture of thoughtful reflection and communal decision-making (Jesuits Global, 2019; Sosa, 2017a).

The integration process was rich in ethical deliberations, where decisions were deeply influenced by Jesuit values and a mission-driven ethos, echoing Benefiel's (2008) discussion on how discernment aids ethical decision-making.

Within the current ecclesial context, the foundational principles articulated in the Apostolic Exhortation *Evangelii Gaudium* by Pope Francis (2013), ecclesial leadership is envisioned as a call to joyfully proclaim the Gospel in today's world, emphasizing the imperative of spiritual discernment in guiding the faithful towards transformative action, as illustrated in the integration of the Jesuit provinces case.

The ecclesial discourse on discernment extends to organizational governance and management, as evidenced by scholarly inquiries into church management and corporate governance within the Catholic Church. (Kheng, 2023; Pfang, 2015). This multidimensional approach to discernment underscores its relevance not only in matters of personal spirituality but also in shaping institutional practices and decision-making processes within ecclesial structures.

Synodality is presented by Becquart (2022) as a fundamental principle of ecclesial life, emphasizing the collaborative and inclusive nature of the Church's mission, involving all members of the Church walking together, and participating actively in the life and mission of the Church. Synodality emphasizes the importance of DC in decision-making processes within the Church (Kheng, 2023).

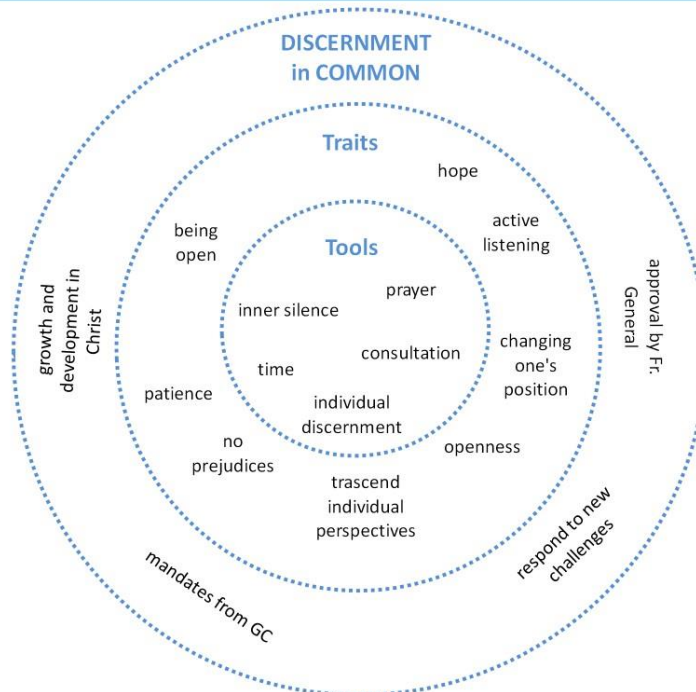
In Figure 27 (The Circles of DC, Traits, and Tools) there is a summary of our Jesuit case context, traits, and tools for DC to be developed sufficiently. The graph illustrates how DC is a holistic process that relies on spiritual tools, personal traits, and an overarching framework rooted in spiritual growth and organizational guidance. Each layer interacts with and supports the others, creating a comprehensive approach to discernment that is both reflective and actionable. In essence, the "me" or the "I" (the person) is at the core, in the center, and the DC (the "we" or the "us"), somehow, helps transcend from the "ego" to the community.

The outermost circle represents "DC," which serves as the overarching context. This layer emphasizes the broader process of growth and development in Christ, the mandates from General Congregations (GC), and approval by Fr. General. These elements provide the spiritual and organizational framework within which discernment takes place.

The middle circle focuses on the essential " Traits " for effective discernment. Key traits include being open, patience, no prejudices, hope, active listening, changing one's position, and

openness. These traits underscore the personal qualities and attitudes necessary for DC within a spiritual community.

The Circles of Discernment in Common, Traits, and Tools



Sources: own elaboration based on primary sources

Figure 27 The Circles of DC, Traits, and Tools

The innermost circle highlights the "Tools" used in the discernment process. These include inner silence, prayer, consultation, time, individual discernment, transcending individual perspectives, and the ability to respond to new challenges. These tools represent the practical methods and practices that facilitate discernment, helping individuals and groups to reach well-grounded decisions.

Context: The mission, General Congregations, Fr. General, and challenges

How to grow and develop within the Society of Jesus is the ultimate inspiration of the integration decision process: "The Society was not instituted by human means, and neither is it through them that it can be preserved and developed, but through the omnipotent hand of Christ, it is necessary to only put hope in Him.", stated in the Constitutions of the Society of Jesus Nr. 812 (Ganss, 1970). Furthermore, the text of the *Formula* exposes the charisma and life of the Society of Jesus and the ultimate reason for being, "*Deus primus*": "And try to keep God first before your eyes as long as you live." (Rambla, J. M., 2001)

Mandates from General Congregations that drive the integration of provinces' decision: There is a consistent and evolving emphasis on DC, Obedience and Consultation, Community Life and Participation, Apostolic Mission, Governance and Leadership, and Adaptation to Modern Challenges.

Father Superior General approves the integration of provinces in Spain: "With our sights set on the greatest and best service to the Church and society, and so that the Company can continue

to provide its mission with renewed impetus and fervor, I approve the proposal presented, in the development of which you can count on my support and the assistance that we may provide from this General Curia. I have the maximum interest in following closely the steps you take.” (Letter from Fr. Superior General Adolfo Nicolás SJ, Nov 14th, 2008)

Responding to new challenges involves adapting to modern realities while maintaining the core Ignatian identity and mission. To this end, enhancing government proximity is crucial, ensuring leadership remains close and responsive to community needs. The integration also emphasizes a shared mission between Jesuits and laypersons, fostering collaboration and shared responsibility in apostolic works. In Spain, this approach aims to create a truly apostolic, Ignatian platform that serves the Church and society.

As part of this strategy, there might be a reduction in the presence of Jesuits in traditional works and a decrease in the number of communities, which is intended to consolidate efforts and resources. This is coupled with a focus on fostering Jesuit vocations, ensuring the continuity of Ignatian charisms. Additionally, the integration emphasizes a common ecclesial vision, guiding Jesuits and lay collaborators on how to be an integral part of the Church. It also addresses how the Society should position itself in a secularized society, engaging with contemporary issues while upholding its spiritual and apostolic commitments.

Traits and tools

Discernment is rooted in attitudes such as listening to others, being open to changing one's position, and recognizing that decisions transcend individual perspectives. This aligns with the need for inner silence, the absence of prejudices, and a focus on seeking God's will. These attitudes are fundamental, emphasizing a spiritual and introspective approach.

Meetings often had a character of discernment, even if not explicitly named as such. This indicates that the process of discernment was integrated informally into various interactions, highlighting a culture of continuous, implicit discernment.

Individual prayer played a crucial role in discernment, serving both as a means of seeking divine inspiration and fostering a spirit of acceptance and patience. This practice helped individuals welcome different opinions, recognize that God speaks through others, and provide the perseverance needed to continue the discernment process.

DC involves collective searching for God's will, often without a strict methodological framework. This approach required openness, active listening, and mutual respect among participants, ensuring that discernment was a collaborative effort grounded in shared spiritual goals.

Achieving inner freedom was identified as a challenge, especially when the issues directly concerned the individuals involved. Discernment required participants to transcend personal biases and concerns to focus on the collective good and divine guidance.

Leadership played a pivotal role in discernment, with leaders of the provinces making decisions through a discernment process that, while not entirely democratic, was heavily influenced by collective input and spiritual reflection. This approach balanced the need for decisive leadership with the benefits of broad participation and shared responsibility.

Discernment was used to address strategic challenges and adapt to new circumstances. This included evaluating whether difficulties could be resolved without compromising the mission and incorporating creative elements and historical knowledge into decision-making.

Common prayer and consultation were integral to the discernment process, fostering a shared spiritual foundation and ensuring that decisions were made in a context of prayerful reflection and communal seeking of God's will.

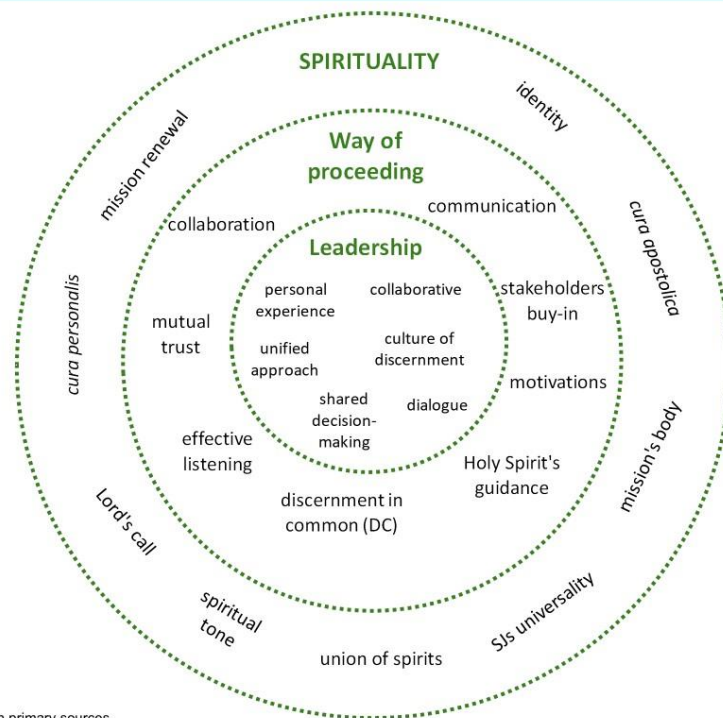
While discernment was valued, it was also recognized that it could not be applied to every decision due to time constraints. This highlights the practical need to balance thorough discernment with efficient decision-making.

Despite its difficulties, the discernment process was met with enthusiasm and hope. The Spirit's guidance was seen as a source of new possibilities, energizing the participants and providing a sense of direction.

6.3. Spirituality

In Figure 28 (The Circles of Spirituality, Way of Proceeding, and Leadership), there is a summary of the spiritual context, the type of leadership, and the way of proceeding. The graph illustrates

The Circles of Spirituality, Way of Proceeding, and Leadership



Sources: own elaboration based on primary sources

Figure 28 The Circles of Spirituality, Way of Proceeding, and Leadership

how leadership is deeply rooted in spirituality and informed by a specific way of proceeding that values, among others, collaboration, discernment, and trust. The layers work together to create a holistic approach to leadership, where spiritual values guide decision-making and interaction within the organization or community. Linking this Figure with the previous one on DC, the type of leadership” proposed is related to the “we” or the “us” (the community) that “inspires” the spirituality (which can be understood as the “Together” or “in communion”. What we see in both Figures is that “DC” requires a “spirituality”, there cannot be discernment without spirituality.

The outermost circle represents "Spirituality" as the broadest context. This layer includes key elements such as mission renewal, *cura personalis* (care for the whole person), identity, *cura apostolica* (care for the apostolic mission), mission's body, and the Lord's call. These elements establish the spiritual foundation and overarching principles that guide the approach to leadership and decision-making.

The middle circle focuses on the "Way of Proceeding," which refers to the processes and methods used in leadership and decision-making. This includes concepts like collaboration, communication, mutual trust, stakeholder buy-in, motivations, effective listening, and spiritual tone. These aspects highlight the importance of an inclusive and communicative approach, rooted in trust and hope in the Holy Spirit's guidance.

The innermost circle is dedicated to "Leadership." It examines the specific characteristics and practices that define leadership within this spiritual framework. Key elements include personal experience, collaborative leadership, a unified approach, a culture of discernment, shared decision-making, and dialogue. This layer emphasizes a leadership style that is both collaborative and discerning, guided by spiritual principles and shared values.

Spirituality

The integration of provinces is an opportunity to renew the mission, to reactivate with generosity the personal response to the Lord's call, to encourage the "union of spirits" and grow in a deep sense of body for the mission of the Society of Jesus.

Literature on mission statements indicates that they play a crucial role in defining organizational identity and direction yet remain under-researched. They provide a compass for strategic decision-making, anchoring the organization's goals and principles.

The Provincial takes the initiative and begins the integration decision-making process. His character traits are "determination and perseverance."

The decision is made at the table of provincials, with a simple and clear vision: one province, one provincial. This is to ensure the unity of government and his ultimate responsibility. The traditional way of proceeding ensures the union of the *cura personalis* and the *cura apostolica* and promotes a participatory and discerning approach to decision-making at all levels, focusing on streamlining, modernizing, and making government structures more flexible.

Interviews highlighted the strategic decision to integrate based on past experiences in other countries, which aimed to enhance the mission's effectiveness by creating a unified approach.

Collaborative Leadership: The integration process underscored the role of leadership in fostering a culture of discernment and shared decision-making. Provincials came together to debate, discern, and decide on the best path forward, emphasizing teamwork and shared responsibility.

Way of Proceeding

The integration process was characterized by mutual trust and collaboration among the provincial brothers. Trust was seen as foundational, enabling effective cooperation and support during challenging times.

Effective listening and discernment were critical. They were necessary not only for addressing current issues but also for evaluating the future of their charism and mission. This provided strength, joy, and hope.

There was a recognition of the challenges and difficulties inherent in the process. However, facing these challenges together and believing that the Spirit was guiding them provided comfort and resilience.

The decision-making phase involved continuous adaptation to new contexts, realities, and challenges. This required maintaining a spiritual key and avoiding purely theoretical discussions, focusing instead on practical and spiritual motions.

The process oscillated between moments of desolation and consolation. Early phases, characterized by uncertainty, often led to desolation. However, as decisions became public and clearer, there was a greater sense of consolation and reassurance.

There was a need to create structures that maintained Ignatian principles while addressing practical challenges. This required a realistic approach that acknowledged problems but did not allow them to hinder progress.

The process demanded significant generosity and total dedication from all involved. This dedication was not just in terms of work but also in maintaining a hopeful and open attitude.

Maintaining unity amidst diversity was crucial. Despite various backgrounds and perspectives, the commitment to working together and maintaining a unified spirit was emphasized. Keeping a spiritual tone throughout the transition process was important for all participants, fostering a sense of unity and purpose. This spiritual engagement was facilitated by close interaction and an explanation of the process.

The integration process was enriched by reflections that provided a sense of the universality of the Society of Jesus. These reflections helped guide the decisions and ensured they aligned with the Jesuits' broader mission.

6.4. [Contemplative Practices in Management](#)

The integration process incorporated reflective practice elements, which helped adjust strategies based on ongoing learning and feedback from various stages of implementation. Continuous evaluation and adaptation were critical throughout the integration process. This approach reflects the principles outlined by Bradach (1996) regarding organizational alignment and the importance of continuously aligning strategy with organizational structures and processes to ensure effective implementation.

Several authors advocate for DC and collective decision-making, reflecting a shift from individualistic approaches to more inclusive and participatory models in management (Barton, 2012; Kheng, 2023). In the Integration case, we saw the practice of DC during the decision, design, and transition phases, not as an explicit methodology to follow, but as an inner attitude. The DC was accompanied by group prayers, the celebration of the Eucharist, one-to-one dialogues, and inner freedom that provided participants with an open attitude toward the unknown (Scharmer, 2016).

Vaughan (2002) defines spiritual intelligence as the ability to create meaning and use multiple levels of consciousness in problem-solving. By engaging in reflective practices, which are integral to developing spiritual intelligence, individuals can achieve a deeper understanding of themselves and their surroundings, fostering personal growth and enhancing their ability to contribute positively to their organizations. Discernment in the Integration of Spanish provinces case is a reflective practice at individual and organizational levels that triggered a sense of

purpose during the decision phase and fostered a positive contribution to the establishment of the new province.

Trauffer (2010) provides a conceptual framework for understanding the behavioral components of discernment, which includes reflective practices. The framework outlines key components such as knowledge acquisition, self-regulation, and knowledge application. Reflective inquiry plays a crucial role in these components by enabling individuals to critically assess and integrate their knowledge and experiences.

Burton and Bainbridge (2019) explore how Quaker business methods, which include DC and ethical considerations, can inform contemporary organizational practices, similar to how Jesuit methods prioritize collective wisdom and ethical considerations. Miller (2020b), and Trauffer (2010) focus on discernment in management and understanding its role in modern organizations. These works provide a framework for integrating traditional spiritual practices with contemporary management challenges, reflecting the quotes' emphasis on adapting discernment practices to current organizational needs and contexts.

7. Conclusions

This final chapter synthesizes the insights gained from the study, providing a comprehensive overview of its implications within the broader ecclesial context and addressing future challenges. Central to this chapter is the examination of the research question: "What impact does DC have on strategic decisions in ecclesial organizations?" We assess how the findings contribute to a deeper understanding of this question, particularly in the context of the Society of Jesus, and broader implications or required adaptation when applied to other contexts.

Additionally, this chapter highlights the practical and theoretical contributions made by the study, while also reflecting on its limitations and suggesting areas for future research. This conclusion serves as a bridge between the current study's outcomes and future inquiries, emphasizing the ongoing relevance and potential adaptation of the concepts discussed.

7.1. Contributions

Theoretical

The general objective of this DBA thesis was to explore the impact of DC on strategic decision-making within ecclesial organizations, materializing through a Jesuit case study. The objectives have been addressed and fulfilled by answering the research questions posed, as the empirical research conducted has illuminated how Ignatian spiritual practices, particularly DC, influence organizational strategies and outcomes during the integration of the Spanish provinces of the Society of Jesus from 2008 to 2014.

This study has made significant contributions in both practical and theoretical realms, as detailed below. Firstly, a notable contribution to the management and spirituality literature has been achieved by presenting a model that enriches the preceding approaches of Saunders (2008), García de Castro (2017), and Benefiel (2008). This model offers a comprehensive framework that bridges the gap between spirituality and strategic management, providing a new lens through which these two domains can be viewed.

Secondly, the study has provided valuable insights into the critical role of DC in the efficient implementation of organizational strategies. This research underscores its importance in fostering ethical decision-making and enhancing organizational integrity by unpacking the mechanisms through which DC influences strategic decisions.

Considering the findings derived from the research, the most representative conclusions of this doctoral thesis are drawn as follows:

Integration of Spirituality and Strategic Management:

This thesis contributes significantly to the management and spirituality literature by presenting a comprehensive model that integrates Ignatian spiritual practices with strategic decision-making. The integration process of the Jesuit provinces in Spain exemplifies how strategic decisions can be deeply intertwined with spiritual discernment, aligning with existing literature on the incorporation of spiritual practices into leadership (Delbecq et al., 2003a; Mintzberg et al., 1976). This model enriches the approaches of Saunders (2008), García de Castro (2017), and Benefiel (2008), emphasizing the importance of ethical decision-making and organizational integrity. The case study underscores the relevance of Ignatian discernment in guiding organizational transformations, supporting a theoretical framework that connects spiritual exercises with strategic leadership. (Nicolás, 2009; Sosa, 2017b)

Advancement in Understanding Strategic Processes in Ecclesial Contexts:

By focusing on the Society of Jesus and its internal strategic processes, the study enriches academic discourse on how religious organizations adapt and implement strategies—an area often underrepresented in mainstream strategic management literature. While specialized journals like the *Journal of Management, Spirituality & Religion* do explore strategic management in religious contexts, these studies are less frequently cited in broader strategic management discussions. This research provides valuable insights into adaptive leadership and mission-centric strategies within religious settings, contributing to a deeper understanding of how such organizations navigate strategic challenges and transformations. (Cardona & Rey, 2022; Reave, 2005)

Reflective Practice and Continuous Adaptation:

The integration process highlighted the critical role of continuous evaluation, reflective practice, and adaptation, essential for managing complex and dynamic environments. This aligns with Sicora's (2017) emphasis on reflective practice in enhancing organizational learning and strategic execution. Additionally, the importance of effective communication and stakeholder engagement was underscored, ensuring transparency, inclusivity, and commitment—key factors in the successful implementation of strategic initiatives, as noted by Okumus (2001) and Freedman (2003). This combination of reflective practice and effective communication enhances organizational integrity and supports ethical decision-making.

Model for Strategy Execution:

The research provides ecclesial organizations with a model and approaches to implement strategies that are both spiritually and operationally effective, promoting a balance between mission-driven imperatives and practical organizational needs, as illustrated in Figure 29 “Model for Strategy execution”.

Model for Strategy Execution

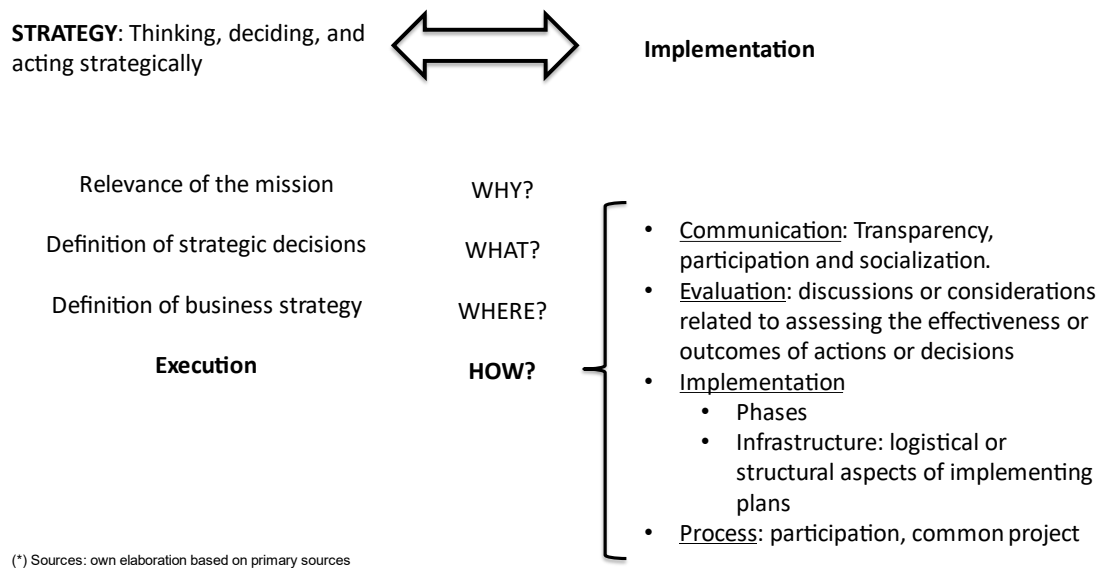


Figure 29 Model for Strategy execution

The model illustrates the seamless transition from strategic planning (thinking and deciding) to execution (acting), and finally to practical implementation. It underscores the importance of clear communication, thorough evaluation, and structured processes in ensuring that strategic decisions are effectively executed and aligned with the overarching mission. This framework highlights the interconnectedness of strategy formulation and its successful execution in achieving organizational goals.

The model begins with the concept of Strategy, which is defined as the process of thinking, deciding, and acting strategically. It emphasizes the importance of addressing the following critical questions in the strategy formulation phase: **WHY?** Understanding the Relevance of the Mission, which underpins the strategic direction; **WHAT?** Defining Strategic Decisions, which are the key actions needed to achieve the mission; **WHERE?** Establishing the Definition of Business Strategy, which determines the course of action where strategy will be applied.

The central concept in the model is Execution, which answers the question **HOW?** This phase involves translating the strategic plan into actionable steps and operational activities. It serves as the bridge between strategic thinking and practical implementation.

The right side of the model focuses on Implementation, which is the practical application of the strategy. It breaks down the implementation into several key components:

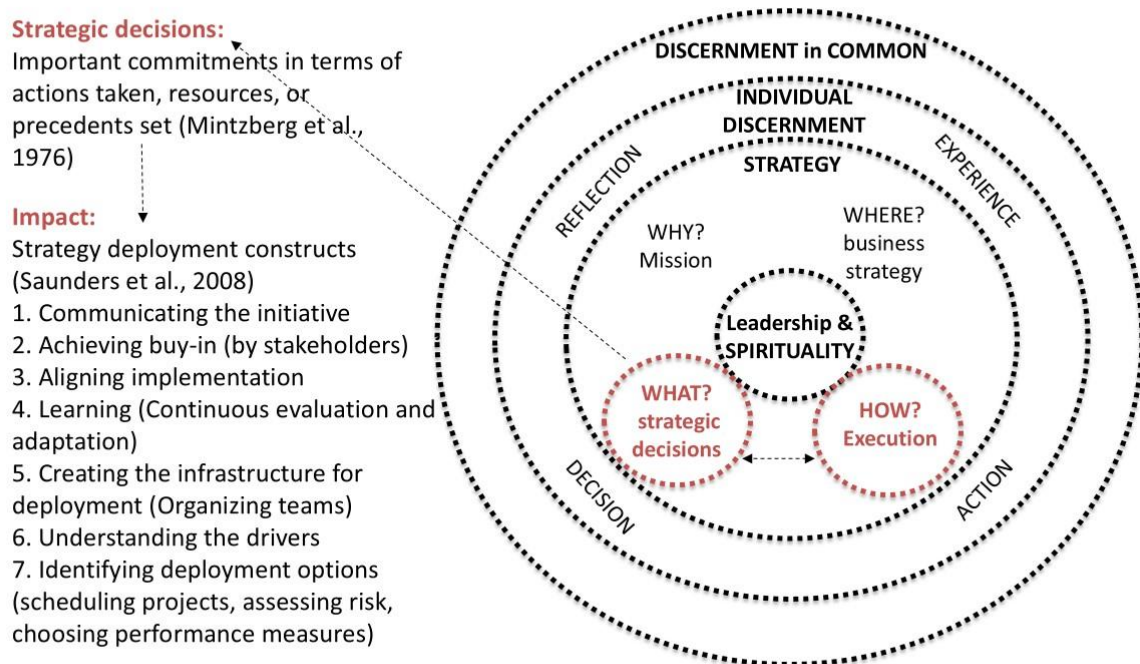
- **Communication:** Ensuring transparency, participation, and socialization of the strategy across the organization.

- Evaluation: Engaging in discussions and considerations related to assessing the effectiveness or outcomes of the actions or decisions taken.
- Implementation Phases: Managing the different phases of execution, including logistical and structural aspects, referred to as infrastructure.
- Process: Involving participation and the alignment of efforts towards a common project or goal.

Model for strategy deployment impact

Measurement of the impact (i.e. benefits) of strategic decisions (Mintzberg et al., 1976) based on DC and its key role as the cornerstone of the decision-making process. This is based on Saunders’ framework of leading implementation practices (2008), and illustrated in the “Model for Strategy Deployment Impact” (Figure 30).

Model for Strategy Deployment Impact



(Figure 30 Model for Strategy Deployment Impact

Such a model illustrates how DC plays a central role in shaping strategic decisions and their implementation, particularly within the integration case of the Jesuit provinces in Spain. Integrating discernment, strategy, and spirituality ensures strategic decisions are made - highlighted by WHAT and HOW? - are reflective and actionable. The constructs outlined by Saunders (2008) provide a clear framework for assessing the impact of these decisions, focusing on communication, buy-in, alignment, learning, infrastructure, drivers, and deployment options.

The right side illustrates the Circles of Discernment, Strategy, and Spirituality, with an outermost layer dedicated to DC. This layer is particularly relevant as it reflects the collective decision-making process, inspired by the Jesuit tradition of discernment, which guided the strategic

integration of Jesuit provinces in Spain. Within this context, DC ensured that strategic decisions were made collaboratively, aligning with spiritual values and the shared mission of the provinces.

At the center of these circles are Leadership and Spirituality, which form the foundation for guiding both strategic decisions and execution. Surrounding this core are the key strategic questions of WHY? (Mission) and WHERE? (Business Strategy), which inform the overall direction of the organization.

Within the discernment circles, WHAT? (Strategic Decisions) and HOW? (Execution) are highlighted in red to emphasize their importance in the strategic deployment process. These elements are central to translating the broader vision of leadership into practical, actionable steps. In the context of the Jesuit provinces' integration, strategic decisions around restructuring were crucial, and their execution required careful coordination, ensuring alignment with both the mission and the discernment process.

The model further integrates the phases of Discernment, including Reflection, Decision, Action, and Experience, as a continuous cycle. These phases ensure that strategic processes are not static but are continually informed by reflection and learning, especially within a spiritual and communal context like the Jesuit provinces.

The outermost circle of DC represents a key influence on the strategic decision-making process. In the context of the Jesuit provinces' integration in Spain, this communal approach to discernment was foundational. It allowed the provinces to navigate complex decisions with a focus on collective reflection, shared mission, and spiritual alignment. This process ensured that strategic decisions were not only organizationally sound but also deeply rooted in Jesuit values and the broader spiritual mission.

On the left side of the graph, Strategic Decisions are defined, drawing on Mintzberg (1976), as important commitments in terms of actions taken, resource allocation, or precedents set. These decisions are pivotal in shaping the trajectory of the organization and ensuring that it remains aligned with its mission. The Impact of Strategic Decisions is assessed using Saunders' (2008) constructs, which identify the key factors that determine the effectiveness of strategy deployment.

Practical

This thesis offers insights and practical contributions, particularly in the realms of apostolic planning within ecclesial organizations and the integration of contemplative practices in management. The lessons drawn from the integration of Jesuit provinces in Spain serve as a comprehensive case study that can be applied to other religious and mission-driven organizations facing similar structural and operational challenges.

Moreover, the thesis highlights the significance of contemplative practices—such as DC and reflective spiritual exercises—in enhancing strategic decision-making and organizational alignment. These practices not only promote a more ethical and collective approach to leadership but also foster continuous personal and organizational growth. The following sections outline specific recommendations and applications derived from these dual focuses, providing a framework for other organizations seeking to integrate spiritual foundations with practical management strategies.

Strategic Restructuring with Spiritual Foundations:

The integration of the Jesuit provinces in Spain serves as a practical example of how organizations can undergo profound structural changes while maintaining a strong spiritual foundation. This "restructuring with spirit" provides a case, "Integration of the provinces of the Society of Jesus in Spain: a restructuring with Spirit (2008-2014)", for other religious and mission-driven organizations to be used whilst facing similar challenges.

Enhancing Apostolic Effectiveness:

The integration aimed at revitalizing the Jesuit mission by addressing demographic and operational challenges. This practical approach to enhancing apostolic effectiveness through strategic restructuring can be applied to other organizations seeking to sustain their missions amidst changing conditions.

Leadership and Governance in Diverse Contexts:

The process highlighted the role of leadership in balancing unity and diversity. The creation of a unified governance structure that respects local identities and cultural contexts offers a practical framework for other organizations dealing with diverse operational environments.

Phased Approach to Implementation:

The structured, multi-phased approach to integration—design, transition, and first triennium—demonstrates a practical method for managing complex organizational changes. This phased approach ensures that each stage is carefully planned and evaluated, allowing for continuous improvement.

Reflective and Adaptive Strategies:

The continuous evaluation and adaptation during the integration process provide a practical example of how organizations can remain responsive to evolving needs. This approach emphasizes the importance of ongoing learning and flexibility in strategic management.

Ethical Decision-Making and Organizational Integrity:

The integration process was characterized by ethical deliberations and a mission-driven ethos, highlighting the importance of integrating ethical considerations into strategic decision-making. This practical application reinforces the value of ethical leadership in maintaining organizational integrity.

Strategic Communication and Stakeholder Engagement:

Effective communication and stakeholder involvement were pivotal in the integration process. This practical insight aligns with the literature on the importance of strategic communication in facilitating change and fostering organizational alignment.

Innovative Approaches to Addressing Demographic Challenges:

The integration addressed the decline in Jesuit numbers and the unsustainable demands on resources through strategic restructuring. This practical approach can serve as a model for other organizations facing similar demographic and resource challenges.

Contemplative practices

The essence of contemplative practices in management, as highlighted in the previous chapter, involves integrating reflective and spiritual elements into organizational decision-making and

strategic alignment. These practices emphasize continuous evaluation and adaptation, ensuring that strategies remain in sync with organizational structures and processes, as noted by Bradach (1996).

Reflective practice is a core component, fostering ongoing learning and adaptation. This approach allows individuals and organizations to align their strategies with real-world implementation, facilitating personal and organizational growth. In parallel, DC shifts the focus from individualistic decision-making to a more collective approach. This involves practices such as group prayers, one-to-one dialogues, and an open attitude towards uncertainty, exemplified by the integration process of Spanish provinces.

Spiritual intelligence is nurtured through these reflective practices and is defined by Vaughan (2002) as the ability to create meaning and engage multiple levels of consciousness in problem-solving, and to understand and apply spiritual principles in leadership roles, not just about achieving organizational goals but also about fostering personal growth and ethical behavior among followers. This not only helps individuals gain a deeper understanding of themselves but also enhances their ability to contribute positively to their organizations. Moreover, these practices incorporate ethical considerations and collective wisdom, akin to Quaker business methods (Burton, 2016). They integrate traditional spiritual practices into contemporary management, offering a framework for addressing modern organizational challenges.

7.2. Future Challenges and Ecclesial Context

This section outlines the future challenges and ecclesial context of our study. They explore the dynamics of integrating younger generations, maintaining mission effectiveness amid demographic changes, and addressing identity ambiguities. Additionally, the ecclesial context emphasizes the importance of discernment, synodality, and collaborative leadership in navigating these challenges.

Future Challenges

Younger generations have welcomed the integration process with enthusiasm, seeing it as a means to support new projects despite the challenges of managing numerous institutions with fewer resources. This reflects an optimistic outlook towards future possibilities and the ability to adapt to changing circumstances.

Although there is a reduction in the number of Jesuits and communities, the apostolic works have remained largely unaffected, demonstrating resilience and sustained mission effectiveness. This suggests a strong commitment to maintaining the mission's impact despite demographic challenges.

There is a sense of identity ambiguity among Jesuits, coupled with a strong apostolic vigor. This duality highlights the need for clearer integration of lay vocations into the Jesuit identity while maintaining the mission's strength.

The process faced complexity in balancing structural necessities with personal and spiritual integration. The need for dynamic groups and deeper personal connections remains a significant challenge after the first triennium.

Local coordination and effective networking within the province are ongoing challenges. While theoretical frameworks exist, practical implementation remains a work in progress, highlighting the need for a mindset shift towards collaborative efforts.

Deepening the *cura personalis* and *cura apostolica* is necessary. The role of superiors and Jesuits needs to adapt to the realities of contemporary religious life, emphasizing a holistic approach to care.

There is a need to foster better accompaniment and formation between Jesuits and laypeople to create a unified apostolic and Ignatian platform, moving beyond mere organizational structures to focus on the Gospel mission.

Addressing nostalgia for the old provinces and identity-based nationalisms is crucial. These sentiments can hinder the integration process and the mission's broader goals.

Educators and lay leaders have shown enthusiasm and reduced fear through training and collaboration. However, some Jesuits are concerned about the increasing presence of laypeople in leadership roles, highlighting the need for a better understanding of religious life and mission values.

Ensuring unity among Jesuits while managing diverse perspectives and ideologies remains a challenge. The focus should be on promoting the mission per the Society's call rather than defending individual ideologies.

The challenge of situating the Jesuits in a highly secularized and culturally diverse society requires reflection and strategic adaptation to remain relevant and effective in their mission.

Defining the relationship between different sectors and platforms within the province is essential for cohesive functioning and shared mission success.

Building personal relationships in the larger, integrated province remains important to foster a sense of community and shared mission, especially among older members.

Ecclesial Context

In ecclesial contexts, discernment is a crucial principle for leadership and decision-making. Pope Francis's Apostolic Exhortation "*Evangelii Gaudium*" emphasizes the importance of discernment, highlighting its role in navigating complex environments effectively. Spiritual discernment in leadership extends beyond personal reflection to include institutional practices and decision-making processes, ensuring that actions are guided by a deeper understanding of spiritual and communal needs. Synodality, which emphasizes listening, dialogue, and DC, fosters inclusivity and participatory decision-making. This spiritual dialogue within synodality is essential for effective discernment, as it allows for diverse voices to be heard and considered. Synodality is viewed as a spiritual journey guided by the Holy Spirit, promoting collaborative and transparent leadership. The Church continues to integrate these principles into its practices, as seen in the General Congregations, which illustrate the practical application of synodality and discernment in its governance and organizational processes.

7.3. Limitations and Future Development

In addition to the contributions outlined earlier, this study acknowledges several limitations that also point to potential areas for future research.

Scope of Generalizability:

The research is specifically tailored to the context of the Society of Jesus and may not directly apply to other religious or secular organizations without modifications. The unique nature of

Ignatian spirituality (de Dalmases, 1990) and its influence on organizational processes might limit the applicability of the findings outside similar contexts.

Dependence on Qualitative Data:

The study relies heavily on interviews and case studies (Stake, 2005), which, while providing depth, might not capture the quantitative impacts of strategic decisions effectively (Johnson et al., 2008; Mintzberg et al., 1976). This could affect the robustness of the conclusions regarding the effectiveness of discernment in achieving strategic goals.

Potential Bias:

The involvement of individuals deeply embedded within the organization might lead to biases in data interpretation and analysis, particularly in assessing the success or failures of strategic initiatives.

Unfortunately, some of the actors (i.e. provincials) of the integration process either passed away (RIP) or were in new roles that made it impossible to meet with and dialogue about their first-hand experiences. Such limitations included other secondary actors that did not participate in the decision-making process but held posts very close to the provincials.

Linked to the previous constraint is the fact that the integration process dates to 2014, and the decision to 2008. This is a significant amount of time, and the reality of the province has changed significantly. Along these lines, the geographical scope is limited to the Spanish territory, which encompasses one of the biggest provinces of the Society of Jesus in the world, but its reality is unique and distinctive relative to other geographies.

Following these limitations, future research should consider the following areas to expand on the findings of this study:

Context Expansion & Reflective Practices:

- Expansion to Other Religious and Secular Contexts: Future research could explore how discernment processes are utilized in other religious organizations and secular contexts, broadening the understanding of spiritual influences on strategic management beyond the Catholic or Jesuit framework.
- Reflective Practices: Incorporating regular group discussions, mindfulness exercises, and inclusive decision-making processes can foster a culture of openness, transparency, and collective responsibility. This approach encourages diverse perspectives and strengthens community within organizations, potentially leading to improved morale and collaboration.
- Linking Theory-U and Discernment: Scharmer's Theory-U (2016) presents a transformative leadership framework that advocates for deep listening, sensing the emerging future, and acting from the highest future potential. It offers practical tools for organizational change and innovation, fostering a more sustainable and inclusive world. It is based on the idea that change happens at the level of consciousness, and that leaders and organizations must be able to access and connect with a deeper level of awareness to create lasting and meaningful change. Linking Theory-U and discernment can help the practice of connecting with a deeper level of awareness, mindfulness (paying attention to one's thoughts, feelings, and sensations, namely "motions" in Ignatian spirituality), empathy (understanding and sharing the feelings of others, namely "spiritual conversation" in Ignatian tradition), prototyping (experimenting and testing with new ideas), and cocreation (change happens through collaboration and partnership, namely "DC" according to Ignatian spirituality).

Quantitative, Longitudinal & Comparative Studies:

- Quantitative Analysis: Developing quantitative methods to measure the impact of discernment on organizational performance could provide a more balanced view of its effectiveness. Metrics could assess strategic outcomes linked to discernment practices, offering data-driven insights into their value.
- Conducting Longitudinal Studies: Tracking the outcomes of strategic decisions influenced by discernment over time would provide deeper insights into the sustainability and long-term effects of these approaches on organizational health and mission alignment.
- Comparative Studies: Comparing organizations that use discernment in their strategic processes with those that do not could highlight the tangible benefits or challenges of integrating spirituality into organizational decision-making.

Spiritual Conversation, Discernment, Synodality:

- Strengthening Links: Further research could explore the connections between spiritual conversation, discernment, and synodality, particularly within the context of the Catholic Church's synodal path. This exploration could deepen the understanding of how these spiritual practices contribute to personal, community, and ecclesial experiences.
- Spiritual Intelligence: Incorporating elements such as empathy, ethical reflection, and a focus on purpose can help leaders and employees navigate complex moral dilemmas, align actions with organizational values, and support personal growth and well-being. This dimension emphasizes the importance of fostering a spiritually aware and ethically grounded organizational culture.

Tensions between Strategy and Purpose

Strategic management usually focuses on competitive environments, financial returns, strategic positioning, etc. objectives, whilst spirituality emphasizes purpose, meaning, and ethical conduct. Such polarity creates a fundamental gap in the objectives of the Spanish Jesuit Provinces integration process: the strategic objective (“material”) versus the purposeful objective (“immaterial”), overcome in our case based on DC. This is a topic that deserves to be further explored, particularly in how these seemingly divergent objectives can be harmonized through a framework that respects both strategic imperatives and spiritual values. Beyond the role of DC as a bridge, this exploration could delve into the potential of integrated leadership models that incorporate both spiritual and strategic dimensions, fostering a leadership culture that balances pragmatism with ethical rigor. Additionally, examining the role of organizational culture in supporting or hindering this integration is crucial—how shared values and collective identity can align with both strategic goals and spiritual missions. Furthermore, it opens up discussions on the development of decision-making processes that are not only analytically robust but also deeply reflective and value-driven. Finally, the potential influence of this integrated approach on stakeholder engagement, where both internal and external stakeholders are treated as partners in a mission that transcends mere financial success, is another rich area for inquiry. This holistic approach could ultimately lead to more sustainable, ethical, and purpose-driven organizations.

Stewardship-ownership

DC deserves to be investigated as a management tool not only for Jesuit and ecclesiastical organizations but for any type of organization. The tension between “strategy and purpose” is increasingly present in Management literature, and in fact, there is a current debate in Corporate Governance and Corporate Strategy about “stewardship-ownership organizations” or “purpose-driven organizations”. The former is based on two ideas: 1. “self-determination”: power over the company cannot be speculated with but is held by people directly connected to the company's operation and mission, that is stewards as opposed to absent owners, and 2. “purpose-orientation” (profits are means to a purpose, not a goal in itself.) Several ecclesial organizations are “stewardship-ownership organizations”, and that is why they need different strategic management that integrates spirituality.

Exploring how DC can function within these organizations as a decision-making process that aligns strategic objectives with deeper ethical and spiritual values is an area ripe for further research. This exploration could extend to understanding how DC might foster greater organizational coherence, resilience, and adaptability in both ecclesiastical and secular contexts. Moreover, there is potential to examine the broader implications of integrating discernment practices into corporate governance frameworks, particularly in enhancing ethical leadership and ensuring that corporate actions are consistently aligned with a higher purpose. As the conversation around purpose-driven businesses continues to grow, integrating spirituality through tools like DC could offer a unique approach to resolving the inherent tensions between profit motives and purpose imperatives, thus contributing to the development of more holistic and sustainable business models.

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Annex A: Literature review and process

Following is the comprehensive process used to conduct the literature review for this research, detailing the stages, sources, timeframe, and keywords mostly utilized.

1. Initial Scoping (Nov 2021):

Objective: To identify the primary themes and theories relevant to DC and its impact on strategic decision-making within ecclesial organizations, with a specific focus on the Society of Jesus.

Sources: Academic databases (JSTOR, Google Scholar), primary texts on Ignatian spirituality and discernment (e.g., works by Aristotle, Kolvenbach, and Sosa), and foundational management literature (e.g. Andrews, Mintzberg).

Keywords: "DC," "Ignatian spirituality," "strategic decision-making," "ecclesial organizations," "communal discernment" "corporate governance" "spiritual exercises" "general congregations" "sacred texts" "Pope Francis" "Saint Paul" "literature review" "grounded theory" "case study" "epistemology" "interviews"

2. Literature Collection (July 2022 - December 2022):

Objective: To gather a broad range of sources, including peer-reviewed articles, books, and relevant theological documents.

Sources: Journal articles (e.g., Journal of Leadership Studies, Journal of Management & Organization, Journal of Management, spirituality, and Religion), books by key authors (e.g., Aaltonen & Ikavalko, Bonet, Creswell & Poth), and ecclesial documents (e.g., Synod on Synodality).

Keywords: "case study research," "strategy implementation," "mission" "leadership ethics," "spiritual discernment," "apostolic planning," "Quaker" "Sufi" "Buddhism" "protestant"

3. Detailed Review and Analysis (January - December 2023):

Objective: To conduct a detailed analysis of the collected literature, identifying gaps, key themes, and theoretical frameworks.

Sources: Detailed readings and annotations from collected sources, focusing on the integration of spiritual practices (e.g. DC) in strategic decision-making and implementation.

Keywords: "apostolic planning," "ethical decision-making," "organizational change," "communal spirituality," "reflexive practice" "spiritual intelligence" "managerial discernment"

4. Synthesis and Integration (January 2024 - May 2024):

Objective: To synthesize the findings from the literature review and integrate them into the thesis framework.

Sources: Compilation of annotated bibliographies, synthesis matrices, and thematic analysis charts.

Keywords: "organization's strategy," "spiritual leadership," "Ignatian discernment," "organizational coherence" "self-awareness" "societal impact"

Key Dates and Activities

- November 2021: Initial scoping and keyword identification.
- July - December 2022: Literature collection from diverse academic and ecclesial sources.
- January - December 2023: In-depth review and analysis of the literature.
- January - May 2024: Synthesis of literature findings into the thesis.

Following are the references by categories.

1. [Individual discernment and reflexive practice](#)

General	Category	Topic	Theory of Reference	Year	Reference article	Summary
1.	1.	Reflexive practice	Reflexive practice	2017	Allen, S. (2017). Learning from Friends: Developing Appreciations for Unknowing in Reflexive Practice. <i>Management Learning</i> , 48(2):125–139.	Perspective on being reflexive, which appreciates unknowing as a core aspect. The intention is to promote more inclusive and equitable ways of managing and organizing. By drawing on experiences of the 'business method' of the Religious Society of Friends, or Quakers, images of the possibilities for reflexive practice, which embrace individual unknowing and helps foster systemic intelligence, are explored. A relational ontology is pursued as these ideas can offer a suitable bridge to bring the processes of Quakers into conversation with debates about reflexive practice. The implication is that in the

						perspective developed, managing reflexively can be understood as a collective practice of searching for unity, or 'sense of the meeting', which is achieved through relational processes.
2.	2.	Discernment	Decision making Group Discernment	2012	Barton, R. H. (2012). Pursuing God's will together: A discernment practice for leadership groups. InterVarsity Press.	Meetings can sap our energy, rupture the community, and thoroughly demoralize us. They can go on forever with no resolution. Or they can rush along without consensus just to "get through the agenda." What if there was another way? Church boards and other Christian leadership teams have long relied on models adapted from the business world. Ruth Haley Barton, president of the Transforming Center, helps teams transition to a much more suitable model—the spiritual community that discerns God's will together. A book to discover personal and group practices that will lead you into a new way of experiencing community and listening to God together.
3.	3.	Discernment	Decision making	2008	Benefiel M. (2008) Using Discernment to Make Better Business Decisions. In: Flynn G. (eds) <i>Leadership and Business Ethics. Issues in Business Ethics</i> , vol 25. Springer, Dordrecht.	This chapter will explore the practice of spiritual discernment, and how discernment can help a leader make more ethical and effective business decisions.
4.	4.	Discernment	Hermeneutics Decision-making Discernment	2017	de Jongh, E. (2017). Discernment in Management: A Hermeneutic Approach. <i>The Quest for Quality of Life</i> , 47-67.	The article argues for the use of a hermeneutic approach in management, which involves the interpretation of texts and other forms of communication. The author suggests that discernment is an important aspect of management and can be developed through a hermeneutic approach. The article argues that hermeneutic approaches can help individuals in

						organizations to better understand the complexity of their experiences and to make informed decisions based on that understanding.
5.	5.	Discernment	Strategic Decisions	2003	Delbecq, A. L., Liebert, E., Mostyn, J., Nutt, P. C., & Walter, G. (2003). Discernment and strategic decision making: Reflections for a spirituality of organizational leadership. In <i>Spiritual intelligence at work: Meaning, metaphor, and morals</i> (pp. 139-174). Emerald Group Publishing Limited.	Benefits of incorporating contemplative practice in management as part of each day: the protagonist can focus more effectively at work, is less irritable, and is more willing to listen to others.
6.	6.	Discernment	Managerial discernment	2004 ()	Falque, L., and V. J. Duriau. (2004). Managerial Discernment: An Examination in the Case of Employee Appraisal. <i>Journal of Management, Spirituality & Religion</i> , 1(1):51–76. () inaugural yr. for discernment publications in the management and organization literature	They first introduce the core concepts, using Ignatian discernment as a basis. Second, they illustrate managerial discernment using an actual case of employee appraisal, combined with a simulation based on the information obtained from the case. Finally, they discuss the implications, both in the context of appraisal and more generally organizational settings.
7.	7.	Discernment	Decision making	2014	Falque, L., and B. Bougon. (2014). <i>Discerner pour décider: Comment faire les bons choix en situation professionnelle</i> . Paris, France: Dunod	Why is it so difficult to make choices? How does the practice of discernment make it possible to dispel doubts, overcome indecision, to overcome the weaknesses of free will? An important stage in the decision-making process, discernment is the capacity of each one to judge according to his subjectivity. It reveals what favors or disrupts established judgments, to better consider the meaning of the work, to decide more freely, and to assume responsibility for it.

8.	8.	Discernment	Spiritual Exercises	1990	(De) Loyola, I. Dalmases, C. (1990). Ejercicios espirituales. Editorial Sal Terrae.	Era muy perceptible la necesidad de una edición manual del texto" Autógrafo" de los Ejercicios Espirituales de San Ignacio de Loyola que, con escrupulosa fidelidad al original y con todas las garantías de los avances de la crítica textual, ofreciera una versión" legible y libre de tropiezos" de una de las obras más conocidas e influyentes en la historia de la espiritualidad cristiana. Tal vez, nadie más indicado para ello que el P. Dalmases, uno de los mayores especialistas en la materia
9.	9.	Discernment	Decision making	2016	Tetlow, J. A. (2016). <i>Always Discerning: An Ignatian Spirituality for the New Millennium</i> . Loyola Press.	What, exactly, is discernment? Why must we do it? When do we do it? How should we do it? The author delves into these questions and shares how lay Christians can implement discernment into not only life's big decisions but also into the every day, more mundane choices we constantly find ourselves having to make. Fr. Tetlow helps the reader see that the dynamic interrelationship of the head, heart, and hands is crucial to the discernment process.
10.	10.	Discernment	Decision making Leadership	2010	Trauffer, H. C., Bekker, C., Bocârnea, M., & Winston, B. E. (2010). Towards an understanding of discernment: A conceptual paper. <i>Leadership & Organization Development Journal</i> .	Behavioral Components of the Discernment Construct: <ul style="list-style-type: none"> · knowledge acquisition · self-regulation: · knowledge application

2. Discernment in Common

General	Category	Topic	Theory of Reference	Year	Reference article	Summary
11.	1.	DC	Discernment	2017	Allen, S. <i>Learning from Friends: Developing Appreciations for Unknowing in Reflexive Practice. Management Learning</i> , 48(2):125–139, 2017.	The author develops a new perspective on being reflexive, which appreciates unknowing as a core aspect. The intention is to promote more inclusive and equitable ways of managing and organizing.
12.	2.	DC	Discernment	1982	Arrupe, P., “ <i>Sobre el discernimiento espiritual comunitario</i> ” en <i>La identidad del Jesuita en nuestros tiempos</i> , Sal Terrae, Santander 1982, 247-252.	The author argues that spiritual discernment is a critical component of Jesuit identity and that it should be practiced at both an individual and communal level. The text emphasizes the importance of community in the process of spiritual discernment and highlights the need for collaboration and mutual support in the pursuit of a deeper spiritual understanding.
13.	3.	DC	Discernment Religious life	1987	Barry, W., “ <i>Toward Communal Discernment: some practical suggestions</i> ” <i>The Way</i> 58 (1987) 104-112.	Every reference to spiritual discernment or the discernment of spirits in the documents of GC 31 refers to individual discernment whereas the preponderance of such references in GC 32 is to DC. GC 32 tries to encourage communities to become communities of discernment:
14.	4.	DC	Courses	2024	Boston College School of Theology and Ministry. (2024). <i>Formacion Continua Online</i> . https://formaciononline.bc.edu/en/home/	Courses that focus on the qualitative benefits and spiritual growth resulting from the DC practice remain at the level of promoting the concept and encouraging its adoption.
15.	5.	DC	Reflexive practice Quakers	2016	Burton, N. (2016). <i>Quaker Business Method: a contemporary decision-making process?</i>	The theology and process by which Friends conduct Meetings for Business deserves renewed attention given its potential

						relevance as a collaborative method of decision-making in today's increasingly complex business organizations.
16.	6.	DC	Discernment Decision making	1970	Dhôtel, J. C., " <i>La Délibération collective</i> ", <i>Christus</i> 17 (1970) 475-479.	The author provides an analysis of the characteristics of collective deliberation and highlights the importance of effective communication, cooperation, and mutual understanding in this process. The article concludes by emphasizing the need for individuals in groups to work together in a spirit of collaboration and mutual support to make informed and effective decisions.
17.	7.	DC	Discernment	2007	de Vera, José M. <i>Selección De Escritos Del P. Peter-Hans Kolvenbach (1991-2007)</i> . vol. 45, PONTIFICIA UNIVERSITAS GREGORIANA FACULTAS HISTORIAE ECCLESIASTICAE ROMAE, 2007.	Las cartas dirigidas a la SJ que ocupan buena parte de este volumen, tienen su origen en lo que San Ignacio esperaba de los sucesores en el gobierno de la Orden: una amplia, detallada, mantenida y filial comunicación no solo con los superiores locales sino también, en la medida de lo posible, con el resto de los miembros de la Compañía.
18.	8.	DC	Discernment	2016	Delbecq, Andre' L., et al. <i>Discernment and Strategic Decision Making: Reflections for a Spirituality of Organizational Leadership</i> . Emerald (MCB UP), 2016.	Discernment integrates spiritual and religious values, wisdom, and sensibilities into decision-making. What can spiritual and religious traditions of discernment contribute to management and organizations? It also draws together writings on discernment from outside the field, and organizes their coverage according to three units of analysis – processes, practices, and meetings – and elaborates the details of discernment within each.
19.	9.	DC	Discernment Religious life	1972	Futrell, J., " <i>Comunal Discernment: Reflections on Experience</i> ",	It provides several practical strategies for promoting this process, including the

					Studies in the Spirituality of the Jesuits IV (1972) 159-192.	importance of open communication, active listening, and a focus on common goals. The article highlights the need for individuals in communities to work together in a spirit of collaboration and mutual support to make informed and effective decisions. The author concludes by emphasizing the importance of communal discernment for promoting unity and growth in religious communities.
20.	10.	DC	Discernment	2016	García de Castro, José. <i>Textos De Discernimiento Comunitario</i> , 2016.	Compilation of texts from GC 31, 32 & 33 of the Society of Jesus regarding DC
21.	11.	DC	Discernment	2017	García de Castro, José. <i>DC Process</i> . 2017.	DC process description.
22.	12.	DC	Discernment	2020	General Curia, S. J. <i>Program for Discerning Leadership</i> , 2020,	The purpose of the Program for Discerning Leadership is to build the capacity of senior Church leaders, including officials in Vatican Dicasteries, General Superiors of religious orders, bishops, and lay leaders, for this mission of discernment, reform, and renewal.
23.	13.	DC	Discernment	2020	Jesuits of Canada. <i>Communal Apostolic Discernment (A toolkit)</i> . , 2020,	Communal apostolic discernment enables a group to identify the Spirit's presence and guidance, aiding in decision-making for the Kingdom. It assesses responses to Christ's Spirit and facilitates communal choices. It serves both community building and apostolic decisions, intertwining inward focus with outward mission, as the community embodies and witnesses cherished values.
24.	14.	DC	Discernment	1986	Kolvenbach, P.-H., <i>"Sobre el discernimiento apostólico en común (5 de nov. de 1986)"</i>	commitment of the Society of Jesus to incessantly search in the Church and for the Church the signs of the times

					Selección de escritos del P. Peter Hans Kolvenbach 1983-1990, Madrid 1992, 52-74.	
25.	15.	DC	Social Discernment Cycle	2015	Liebert, E. (2015). <i>The soul of discernment: a spiritual practice for communities and institutions.</i> Presbyterian Publishing Corp.	Provides concrete steps for groups of people who work together and need to make important decisions: church sessions, nonprofit hiring committees, etc. Liebert calls this process the Social Discernment Cycle, a process for seeking God's call in a particular situation. It is called social because it deals primarily with human communities in their social-structural, rather than interpersonal aspects.
26.	16.	DC	Discernment	2020	Miller, Kent D. "Discernment in Management and Organizations." <i>Journal of Management, Spirituality & Religion</i> , vol. 17, no. 5, 2020, pp. 373-402.	The article explores how spiritual and religious traditions of discernment can enhance decision-making in management and organizations. It reviews existing research, clarifies discernment's role in the field, and categorizes findings by processes, practices, and meetings. This conceptual framework sets the stage for future advances in discernment research within organizational contexts.
27.	17.	DC	Spiritual	2012	Morris, D. E., & Olsen, C. M. (2012). <i>Discerning God's will together: A spiritual practice for the church.</i> Rowman & Littlefield.	Bible study, research, and fieldwork merge in this book of practical principles for decision-making by spiritual discernment. The step-by-step approach can be used to help any size group learn a new way to make decisions--a way that is interactive, spiritual, and rooted in faith practices and community. Useful for small groups, committees, church boards, church leaders at all levels, and seminary professors.

28.	18.	DC	Discernment	2009	Nicolás, Adolfo. "Discernimiento Apostólico En Común." <i>Revista De Espiritualidad Ignaciana</i> , vol. 122, 2009, pp. 19.	During the first morning of the course/workshop of "Community Apostolic Discernment (CAD) in the light of GC35", in January 2009, the group of about 86 people, Jesuits and lay people, enjoyed the privilege of meeting with Father General, Adolfo Nicolás, SJ. in an informal conversation.
29.	19.	DC	Discernment	2018	Pérez, F. J. R. "La Congregación General 36 y Su Invitación Al Discernimiento En Común." <i>Manresa: Revista De Espiritualidad Ignaciana</i> , 90(354), 2018, pp. 17-26.	The proposal in this article is to highlight one of the important contributions of CG 36 since the preliminary work began on December 8, 2014, and, already in Rome, during the classroom sessions from October 1, 2016, until its completion on November 12. "It is about the impulse that GC 36 gives to DC."
30.	20.	DC	Society of Jesus General Congregations	2019	Rambla, Josep M., Lozano, Josep M. Discernimiento Comunitario Apostólico. EIDES 89. Cristianisme i Justícia. 2019.	Offers authorized support for the study and application of community discernment (DC) and apostolic community discernment (ADC), compiling all the documents of the General Congregations, along with letters and other more relevant texts from the Superiors General of the Society of Jesus.
31.	21.	DC	Measurement	2010	Trauffer, H. C. V., Bekker, C., Bocârnea, M., & Winston, B. E. (2010). A three-factor measure of discernment. <i>Leadership & Organization Development Journal</i> , 31(3), 263-284.	The approach takes the form of a mixed-method exploratory design that relies on principal component analyses and internal consistency performed on the resultant data set from a pool of items developed from the literature and a panel of experts. The investigation employed in-depth interviews with eight purposively selected leaders about their decision-making processes and augmented the findings with data from 240 leaders, generated via an online survey.

3. Leadership, spirituality, and ethics

General	Category	Topic	Theory of Reference	Year	Reference article	Summary
32.	1.	Spirituality	Sufi tradition	2003	Al-Jerrahi, F. (2003). The sufi path of guidance. <i>Tending the Holy</i> , Ed.Vest,	Al-Jerrahi's "The Sufi Path of Guidance" from "Tending the Holy" explores Sufi teachings for spiritual guidance. It delves into practices and principles guiding individuals along the Sufi path. The text offers insights into nurturing the soul and seeking spiritual direction, contributing to personal growth and enlightenment.
33.	2.	Ethics	Ethical Policy	1984	Andrews, Kenneth R. "Difficulties in Overseeing Ethical Policy." <i>California Management Review</i> , vol. 26, no. 4, 1984, pp. 133-137. Crossref,	Kenneth R. Andrews' article "Difficulties in Overseeing Ethical Policy" in <i>California Management Review</i> discusses challenges in implementing ethical policies within organizations. It examines complexities such as conflicting interests and ambiguous guidelines, offering insights into effectively managing ethical dilemmas in corporate settings.
34.	3.	Leadership	Authentic New genre Complexity Shared Collective Servant Spirituality	2009	Avolio, B. J., Walumbwa, F. O., & Weber, T. J. (2009). Leadership: Current theories, research, and future directions. <i>Annual review of psychology</i> , 60, 421-449.	This review explores recent developments in leadership theory and practice, starting with authentic leadership and its development, cognitive science approaches, and new-genre leadership theories. It covers complexity, shared, and collective leadership, the role of relationships through leader-member exchange and followership, substitutes for

						leadership, servant leadership, spirituality, cross-cultural leadership, and e-leadership.
35.	4.	Spirituality	Workplace	2005	Benefiel, Margaret. <i>Soul at Work</i> . Church Publishing Incorporated, New York, 2005.	Delves into the integration of spirituality in the workplace. It explores how individuals can nurture their spiritual selves within professional settings, fostering personal growth and enhancing organizational effectiveness.
36.	5.	Ethics	Morals	1781	Bentham, J. (1781). <i>An introduction to the principles of morals and legislation</i> . History of Economic Thought Books.	Bentham outlines utilitarianism, proposing that the moral worth of actions is determined by their capacity to produce pleasure or reduce pain. He advocates for maximizing overall happiness as the guiding principle of ethical decision-making.
37.	6.	Spirituality	Jewish	1951	Bokser, B. Z. (1951). <i>The Wisdom of the Talmud: A Thousand Years of Jewish Thought</i> (Vol. 1). Library of Alexandria.	Exploration of Jewish thought spanning a millennium. This work delves into the Talmud's teachings, highlighting its profound wisdom and cultural significance. Bokser elucidates the Talmud's role in shaping Jewish life and thought.
38.	7.	Spirituality	Ignatian	2005	Coghlan, David. "Ignatian Spirituality as Transformational Social Science." <i>Action Research (London, England)</i> , vol. 3, no. 1, 2005, pp. 89-107.	The article delves into how Ignatian principles can inform and enrich action research practices, contributing to a deeper understanding of social dynamics and fostering positive societal change through reflective inquiry.
39.	8.	Ethics	Aristotle	2014	Crisp, R., & Aristotle. (2014). <i>Aristotle: Nicomachean ethics</i> . Cambridge University Press.	Aristotle's <i>Nicomachean Ethics</i> is the first and arguably most important treatise on ethics in Western philosophy. It remains to this day a compelling reflection on the best sort of human life and continues to inspire contemporary thought and debate. This Cambridge Companion includes twenty

						essays by leading scholars of Aristotle and ancient philosophy that cover the major issues of this text. The essays in this volume shed light on Aristotle's rigorous and challenging thinking on questions such as: can there be a practical science of ethics?
40.	9.	Spirituality	Spiritual Exercises	1985	De Loyola, Ignacio. <i>Ejercicios Espirituales</i> . vol. 10, Editorial Sal Terrae, 1985.	Presents a foundational text in Ignatian spirituality. Offering a structured program for spiritual growth and discernment, it remains a significant resource for individuals seeking deeper spiritual insight and guidance in their lives.
41.	10.	Spirituality	Religion Productivity	2005	Dent, E. B., Higgins, M. E., & Wharff, D. M. (2005). Spirituality and leadership: An empirical review of definitions, distinctions, and embedded assumptions. <i>The Leadership Quarterly</i> , 16(5), 625-653.	Eighty-seven scholarly articles were reviewed. Findings conclude that most researchers couple spirituality and religion and that most either have found or hypothesize a correlation between spirituality and productivity.
42.	11.	Ethics	Leadership	2008	Flynn, G. (2008). The virtuous manager: A vision for leadership in business. <i>Journal of Business Ethics</i> , 78, 359-372.	A vision for business leadership based on a recovery of virtue. The vision for leadership articulated here draws principally on the writings of the classical philosopher Aristotle and the contemporary philosopher Josef Pieper.
43.	12.	Ethics	Leadership	2022	Flynn, G. (Ed.). (2022). <i>Leadership and business ethics</i> (Vol. 60). Springer Nature.	It examines the intersection of leadership and ethical principles in business contexts. The book delves into various ethical challenges faced by leaders, offering insights into ethical decision-making and the cultivation of ethical organizational cultures, essential for sustainable business practices and societal well-being.

44.	13.	Spirituality	Leadership	2003	Fry, Louis W. "Toward a Theory of Spiritual Leadership." <i>The Leadership Quarterly</i> , vol. 14, no. 6, 2003, pp. 693-727.	The article proposes a causal theory of spiritual leadership grounded in intrinsic motivation, integrating vision, hope, faith, and altruistic love. It aims to align organizational values and individual motivations, fostering commitment and productivity. It explores spirituality in the workplace, distinguishes it from religion, and emphasizes the importance of leaders embodying core values to inspire followers.
45.	14.	Ethics	Deductive science	1956	Heath, T. L. (Ed.). (1956). The thirteen books of Euclid's Elements. Courier Corporation.	Euclid's "Elements," Books 1 and 2, lay the foundation of geometry with definitions, postulates, and common notions. Book 1 focuses on basic concepts like points, lines, and angles, while Book 2 explores geometric constructions and the concept of congruence.
46.	15.	Spirituality	Spiritual Exercises	2008	J.M. Rambla (ed.). <i>Ejercicios Espirituales De San Ignacio De Loyola. una Relectura Del Texto I</i> . CRISTIANISME I JUSTÍCIA, 2008.	It offers a reinterpretation of Ignatius of Loyola's Spiritual Exercises. Published in 2008, the book provides insights and reflections on the foundational text of Ignatian spirituality, encouraging a deeper engagement with its teachings for spiritual growth.
47.	16.	Ethics	Morals	1785	Kant, I. (1785). <i>Groundwork of the Metaphysics of Morals</i> (1785). New Haven.	Kant establishes deontological ethics, arguing that moral actions are driven by duty and universal principles, not consequences. His categorical imperative emphasizes acting according to maxims that could be willed universally.
48.	17.	Spirituality	Leadership	2009	Lowney, C. (2009). Heroic leadership: Best practices from a 450-year-old company that changed the world. Loyola Press.	Lowney reveals the leadership principles that have guided the Jesuits for more than 450 years: self-awareness, ingenuity, love, and heroism. Lowney shows how these same

						principles can make each of us a dynamic leader in the twenty-first century.
49.	18.	Spirituality	Leadership	2019	Nullens, P. (2019). From spirituality to responsible leadership: Ignatian discernment and theory-u. <i>Leading in a VUCA World: Integrating Leadership, Discernment and Spirituality</i> , 185-207.	Explores the evolution of spirituality in the context of leadership. Published in 2019, it examines how spirituality contributes to fostering responsible leadership practices. The book delves into the intersection of personal spiritual growth and ethical leadership, offering insights into creating positive organizational cultures and societal impact through responsible leadership.
50.	19.	Spirituality	Leadership Effectiveness	2005	Reave, L. (2005). Spiritual values and practices related to leadership effectiveness. <i>The Leadership Quarterly</i> , 16(5), 655-687.	This review of over 150 studies shows that there is a clear consistency between spiritual values and practices and effective leadership.
51.	20.	Spirituality	Leadership	2016	Scharmer, Claus O. <i>Theory U</i> . Berrett-Koehler Publishers, Inc., a BK Business Book, San Francisco, California, 2016.	Introduces a transformative framework for leadership and organizational change. It advocates for a shift from ego-system to eco-system awareness, fostering innovation, collaboration, and systemic change. The book offers practical tools and case studies to guide individuals and organizations through profound shifts toward a more sustainable future.
52.	21.	Spirituality	Yoga	1987	Tapasyananda, S. (1987). <i>Four yogas of swami vivekananda</i> . Advaita Ashrama (A publication branch of Ramakrishna Math, Belur Math).	Vivekananda's original works with a better understanding of their thought structure. It's a doorway to the splendid literature of one of the greatest philosopher-saints of the modern age. It presents concisely the four yogas of Swami Vivekananda-Karma. Yoga, Raja Yoga, Bhakti Yoga, and Jnana Yoga.
53.	22.	Spirituality	Buddhism	2003	Tejadharmo Bhikku. (2003). Some aspects of spiritual direction within a	Tejadharmo Bhikku discusses spiritual direction within a living Buddhist tradition.

					living Buddhist tradition. In Norvene Vest (Ed.), <i>Tending the holy: Spiritual direction across traditions</i> (pp. chapter 1). Harrisburg, Pa.: Morehouse, 2003.	Exploring various aspects, the chapter offers insights into the practice of spiritual guidance within Buddhism, contributing to a broader understanding of spiritual direction across diverse religious traditions.
54.	23.	Spirituality	Reconciliation	2009	Tutu, D. (2009). <i>No future without forgiveness</i> (1st ed.). The Crown Publishing Group.	Tutu shows readers how to move forward with honesty and compassion to build a newer and more humane world.
55.	24.	Spirituality	Taoism	1963	Tzu, L. (1963). <i>Tao te ching</i> (DC lau, trans.). New York, NY: Viking Penguin,	Tzu's "Tao Te Ching," translated by D.C. Lau in 1963, presents the foundational text of Taoism. It explores themes of simplicity, humility, and harmony with the Tao, or the Way.
56.	25.	Spirituality	Spiritual intelligence	2002	Vaughan, F. (2002). What is spiritual intelligence? <i>Journal of Humanistic Psychology</i> , 42(2), 16-33.	Spiritual intelligence calls for multiple ways of knowing and for the integration of the inner life of mind and spirit with the outer life of work in the world. It can be cultivated through questing, inquiry, and practice.
57.	26.	Spirituality	Confucianism	2007	Watson, B. (2007). <i>The Analects of Confucius</i> . Columbia University Press.	Offers a contemporary and accessible version of the classic Chinese text. The Analects compile the sayings and ideas of Confucius, emphasizing ethics, family loyalty, and the importance of education.
58.	27.	Ethics	Protestant	2001	Weber, Max. <i>The Protestant Ethic and the Spirit of Capitalism</i> . Routledge, United Kingdom, 2001.	Explores the relationship between Protestantism and the development of capitalism. Weber argues that Protestant values, particularly those of the Calvinist tradition, influenced the rise of capitalism by promoting diligence, frugality, and a sense of calling in economic pursuits.
59.	28.	Spirituality	World scripture	1991	Wilson, A. (1991). <i>World scripture</i> . Paragon House Publ.	Is a comprehensive anthology of sacred texts from various religious traditions. Wilson's work offers comparative insights into

						fundamental themes across religions, facilitating a deeper understanding of diverse spiritual perspectives and fostering interfaith dialogue. It serves as a valuable resource for scholars, practitioners, and anyone interested in religious studies.
60.	29.	Spirituality	Spiritual Intelligence	2012	Zohar, D. (2012). <i>Spiritual intelligence: The ultimate intelligence</i> . Bloomsbury publishing.	In this century, there is enough collective evidence from psychology, neurology, anthropology, and cognitive science to show us that there is Spiritual Intelligence. SQ is uniquely human and, the authors argue, the most fundamental intelligence. SQ is what we use to develop our longing and capacity for meaning, vision, and value. It allows us to dream and to strive. It underlies the things we believe in, and the role our beliefs and values play in the actions that we take and the way we shape our lives.

4. Strategy

General	Category	Topic	Theory of Reference	Year	Reference article	Summary
61.	1.	Strategy	Execution	2002	Aaltonen, P., & Ikävalko, H. (2002). Implementing strategies successfully. <i>Integrated manufacturing systems</i> , 13(6), 415-418.	The paper presents the key findings of a study on strategy implementation. A qualitative study of 298 interviews was conducted in 12 service organizations. In the paper, the key findings are introduced, and the challenges of strategic communication and action, the identification of and support for strategic actors, and structure and systems aligned with strategy, are discussed.
62.	2.	Strategy	Mission	2018	Alegre, I., Berbegal-Mirabent, J., Guerrero, A., & Mas-Machuca, M. (2018). < <i>The real mission of the mission statement: A systematic review of the literature</i> . <i>Journal of Management & Organization</i> , 24(4), 456-473.	A mission statement is a widely used strategic tool that emphasizes an organization's uniqueness and identity. It was not until the early 80s that academics, managers, and consultants recognized the need to explicitly formulate a mission statement in organizations. This article proposes a systematic literature review to synthesize research on mission statements. The overarching conclusion is that mission statements are widely used in practice but poorly researched in theory. Most articles adopt a managerial phenomenon-based strand, lacking a deep theoretical foundation.
63.	3.	Strategy	Design	1997	Andrews, K. R. (1997). <i>The concept of corporate strategy</i> .	The process of strategic formation is a design process to reach a satisfactory balance

					<i>Resources, firms, and strategies: a reader in the resource-based perspective, 52.</i>	between internal distinctive competence and external threat and opportunity.
64.	4.	Strategy	Design	1965	Ansoff, H. I. (1965). <i>Corporate strategy: An analytic approach to business policy for growth and expansion</i> . McGraw-Hill Companies.	Introduces the concept of the Ansoff Matrix, a tool for analyzing and planning a company's growth strategy, and emphasizes the importance of considering the fit between an organization and its environment when developing a strategy. He argues that strategy should be seen as a dynamic process of adaptation and adjustment that considers changes in the external environment as well as the organization's internal capabilities and resources.
65.	5.	Strategy	Decision making	1987	Bourgeois, L. J., and Kathleen M. Eisenhardt. "Strategic Decision Processes in Silicon Valley: The Anatomy of a Living Dead." <i>California Management Review</i> , vol. 30, no. 1, 1987, pp. 143-159.	In their article L.J. Bourgeois and Kathleen M. Eisenhardt analyze decision-making dynamics in Silicon Valley. They explore the intricacies of strategic decision processes in dynamic technology environments, shedding light on factors influencing organizational adaptability and survival.
66.	6.	Strategy	Implementation	1996	Bradach, J. L. (1996). <i>Organizational alignment: The 7-S model</i> . Harvard Business Review.	This note offers one framework—the 7-S model—that leaders and consultants have found extremely useful in their efforts to design organizations and diagnose problems that arise in them.
67.	7.	Strategy	Mission	2022	Cardona, P., & Rey, C. (2022). <i>Management by missions: Connecting people to strategy through purpose</i> (2nd ed.). Springer International Publishing.	The authors present the main tools of the MBM method (shared missions, missions scorecards, interdependency matrix, missions-based objectives, and integral assessment) and the type of leadership needed to implement it.

68.	8.	Strategy	Decision making	1992	Eisenhardt, Kathleen M., and Mark J. Zbaracki. "Strategic Decision Making." <i>Strategic Management Journal</i> , vol. 13, no. S2, 1992, pp. 17-37.	The authors investigate the dynamics of strategic decision-making processes. Through empirical research and theoretical insights, they analyze how organizations navigate complex environments, make strategic choices, and adapt their decision-making approaches to achieve competitive advantage and sustain long-term performance in dynamic markets.
69.	9.	Strategy	Planning	1984	Freeman, R. E. <i>Strategic Management</i> . Pitman, Boston [u.a.], 1984.	Presents comprehensive insights into strategic planning and organizational management. Freeman discusses frameworks for analyzing competitive environments, developing strategic objectives, and implementing strategies effectively. The book offers practical guidance for managers to align organizational resources with external opportunities and challenges, aiming to enhance strategic decision-making and organizational performance.
70. 5	10.	Strategy	Execution	2001	Hacker, M. E., Kotnour, T., & Mallak, L. A. (2001). Formalizing deployment processes in the US Government. <i>International Journal of Public Sector Management</i> , 14(3), 221-240.	The linkage between strategic planning and daily activities within an organization is often obscure. Perhaps as a consequence, many well-developed strategic plans fail to be implemented, and required goals and objectives are not attained. Strategy deployment processes link strategic plans with implementation activities. Instead of investing more time and energy in improving planning or implementation processes, an organization should first examine the deployment processes used to link strategic plans with action.
71. 5	11.	Strategy	Execution	1992	Hrebiniak, L. (1992). Implementing global strategies. <i>European</i>	Setting up a corporate global strategy is only half the story. Implementing it successfully

					Management Journal, 10(4), 392-403.	involves much skill and is a very challenging task. Lawrence Hrebiniak reviews both the general issues and specific needs of global strategy. Next, he categorizes four stages that companies go through in pursuit of their global destiny. In the last, and most important of these—co-ordinated global strategy—there are routes to success, used separately or together.
72.	12.	Strategy	Corporate	2008	Johnson, Gerry, Kevan Scholes, and Richard Whittington. <i>Exploring Corporate Strategy: Text and Cases</i> . Pearson Education, 2008.	It presents a comprehensive overview of corporate strategy. Integrating theoretical concepts with real-world case studies, the book offers insights into strategic management processes, including analysis, formulation, and implementation. It explores contemporary strategic challenges faced by organizations, providing practical frameworks and tools to navigate dynamic business environments effectively.
73.	13.	Strategy	Execution	2000	Kaplan, R. S., & Norton, D. P. (2000). The strategy-focused organization. Harvard Business Review Press.	Kaplan and Norton articulate the five key principles required for building strategy-focused organizations: 1) translate the strategy into operational terms, 2) align the organization to the strategy, 3) make strategy everyone's everyday job, 4) make strategy a continual process, and 5) mobilize change through strong, effective leadership.
74.	14.	Strategy	Execution	2002	Linton, J. D. (2002). Implementation research: state of the art and future directions. <i>Technovation</i> , 22(2), 65-79.	A successful implementation process is critical to gaining the economic and competitive advantages that innovation offers. Not enough is understood about the implementation process since so many firms' efforts are either complete or partial failures. The network is

						proposed as the level of analysis that best reflects the reality that practitioners involved in the implementation process face. Finally, models are offered that integrate existing knowledge of implementation with a network perspective.
75.	15.	Strategy	Implementation Case study approach	1997	Miller, S. (1997). Implementing strategic decisions: Four key success factors. <i>Organization Studies</i> , 18(4), 577-602.	Empirical study aimed at elucidating reasons for success or failure in the implementation of strategic decisions, using a case-study approach. Four factors appear to be critical for the successful management of implementation: backing, clear aims and planning, and a conducive climate.
76.	16.	Strategy	Execution	2008	Miller, Susan, David Hickson, and David Wilson. "From Strategy to Action." <i>Long Range Planning</i> , vol. 41, no. 6, 2008, pp. 606-628.	Miller, Hickson, and Wilson's article "From Strategy to Action" in <i>Long Range Planning</i> , 2008, discusses the implementation of strategic plans. It examines factors influencing successful strategy execution, such as organizational culture, leadership, and communication. The authors offer insights into bridging the gap between strategy formulation and its practical implementation within organizations.
77.	17.	Strategy	Emergent	1985	Mintzberg, H., & Waters, J. A. (1985). <i>Of strategies, deliberate and emergent</i> . <i>Strategic Management Journal</i> , 6(3), 257-272.	Deliberate and emergent strategies may be conceived as two ends of a continuum along which real-world strategies lie. This paper seeks to develop this notion, and some basic issues related to strategic choice, by elaborating along this continuum on various types of strategies uncovered in research. These include strategies labeled

						planned, entrepreneurial, ideological, umbrella, process, unconnected, consensus, and imposed.
78.	18.	Strategy	Emergent	1978	Mintzberg, H. (1978). <i>Patterns in strategy formation</i> . <i>Management Science</i> , 24(9), 934-948.	By defining a strategy as "a pattern in a stream of decisions", we can research strategy formation in a broad descriptive context. Specifically, we can study both strategies that were intended and those that were realized despite intentions.
79.	19.	Strategy	Decision making	1976	Mintzberg, H., Raisinghani, D., & Theoret, A. (1976). The structure of "unstructured" decision processes. <i>Administrative Science Quarterly</i> , 246-275.	A field study of 25 strategic decision processes, together with a review of the related empirical literature, suggests that a basic structure underlies these "unstructured" processes. This structure is described in terms of 12 elements: 3 central phases, 3 sets of supporting routines, and 6 sets of dynamic factors. This paper discusses each of these elements in turn and then proposes a general model to describe the interrelationships among them.
80.	20.	Strategy	Execution	1999	Noble, C. H. (1999). Building the strategy implementation network. <i>Business Horizons</i> , 42(6), 19-28.	A recent large-scale research project set out to explore these complex implementation webs to gain a better understanding of the factors that lead to cross-functional implementation success. The result was a deeper understanding of what was eventually termed the implementation network, which exists in some form in virtually every organization.
81.	21.	Strategy	Execution	2001	Okumus, F. (2001). Towards a strategy implementation framework. <i>International journal of contemporary hospitality Management</i> .	Aims to develop an implementation framework. Further to a critical review of previous research, ten implementation variables were identified and a conceptual framework was constructed. The

						implementation process of a strategic decision was investigated in two international hotel groups via in-depth, semi-structured interviews, observations, and documentation analysis.
82.	22.	Strategy	Strategic decisions	2019	Planellas, M., & Muni, A. (2019). <i>Strategic decisions</i> . Cambridge University Press.	Tool for anyone facing the challenge of making strategic decisions. Using their 'circle of strategic decisions' framework, they guide readers through the decision-making process. They present thirty of the most widely used strategic models. For each model, they demonstrate the content, context, and application, using clear and eye-catching graphics.
83.	23.	Strategy	Execution	1991	Roth, K., Schweiger, D. M., & Morrison, A. J. (1991). Global strategy implementation at the business unit level: Operational capabilities and administrative mechanisms. <i>Journal of International Business Studies</i> , 22, 369-402.	The study examines the impact of international strategy on organizational design and the influence of organizational design on effectiveness at the business unit level. The empirical findings are based on survey responses from eighty-two business units competing in global industries. The findings are supportive of the contingency notion which suggests that business unit effectiveness is a function of the fit between the international strategy and the organizational design.
84.	24.	Strategy	Execution	2008	Saunders, M., Mann, R., & Smith, R. (2008). Implementing strategic initiatives: a framework of leading practices. <i>International Journal of Operations & Production Management</i> .	The purpose of this paper is to report the leading operations management practices and the strategy deployment framework that emerged from a qualitative study that addressed the question of how managers implement strategy in an organizational excellence environment.

85.	25.	Strategy	Execution	1994	Schmelzer, C.D. and Olsen, M.D. (1994), "A data-based strategy implementing framework for companies in the restaurant industry", <i>International Journal of Hospitality Management</i> , Vol. 13 No. 4, pp. 347-59	The purpose of this study was to conduct an exploratory investigation of strategy implementation in multi-unit restaurant firms. A preliminary model comprised of ten variables was developed based on a review of the theory and prescription for implementation. Qualitative research methods were used to collect and analyze the data from three firms. The findings of this investigation included 14 propositions and a new framework consisting of 14 variables which explain the associations between the variables found to be integral to implementation in the three firms.
86.	26.	Strategy	Execution	2021	Tawse, Alex, and Pooya Tabesh. "Strategy Implementation: A Review and an Introductory Framework." <i>European Management Journal</i> , vol. 39, no. 1, 2021, pp. 22-33.	The authors present a comprehensive review of strategy implementation literature and propose a framework for understanding and approaching the implementation process. They emphasize the importance of aligning implementation efforts with strategic objectives for organizational success.
	27.	Strategy	Execution	1980	Waterman Jr, R. H., Peters, T. J., & Phillips, J. R. (1980). <i>Structure is not organization</i> . <i>Business Horizons</i> , 23(3), 14-26.	Productive organizational change is not simply a matter of structure. It is not so simple as the interaction between strategy and structure. They claim that effective organizational change is the relationship between structure, strategy, systems, style, skills, staff, and something authors call superordinate goals.
87.	28.	Strategy	Practice Theory Strategizing	1996	Whittington, R. (1996). <i>Strategy as practice</i> . Long range planning, 29(5), 731-735.	This article maps the development of strategic thinking since the 1960s and identifies an emerging perspective on strategy as 'practice'. The practice perspective on strategy focuses on strategists and strategizing, rather than organizations and strategies.

5. Ecclesial

General	Category	Topic	Theory of Reference	Year	Reference article	Summary
88.	1.	Catholic Church	Synodality	2022	Becquart, N. (2022). SYNODALITY: A Path of Personal and Communal Conversion. <i>Way</i> , 61(3).	The article explores synodality as a path of personal and spiritual communal conversion. It discusses the practice of synodality as a call to live in the image of the Trinitarian communion in what the Lord expects of the Church given its missionary transformation. It explains the importance of implementing a practice of discernment, as well as of rediscovering the communal journey in life to serve the common good that is rooted in an ecclesiology of the People of God.
89.	2.	Catholic Church	Pope Francis	2013	Catholic Church, and Pope Francis. <i>Apostolic Exhortation Evangelii Gaudium of the Holy Father Francis to the Bishops, Clergy, Consecrated Persons, and the Lay Faithful on the Proclamation of the Gospel in Today's World</i> . Libreria Editrice Vaticana, 2013.	Pope Francis's Apostolic Exhortation "Evangelii Gaudium" addresses contemporary challenges in spreading the Gospel, urging bishops, clergy, and the faithful to engage actively in evangelization. It emphasizes the Church's mission and the importance of joyfully sharing the message of the Gospel in today's world.
90.	3.	Catholic Church	Pope Francis	2015	Francis, Pope. "Ceremony Commemorating the 50th Anniversary of the Institution of the Synod of Bishops." <i>Paul VI Audience Hall. October</i> , vol. 17, 2015.	During the Ceremony Commemorating the 50th Anniversary of the Institution of the Synod of Bishops at the Paul VI Audience Hall in October 2015, Pope Francis highlighted the Synod's role in fostering collegiality and collaboration within the Church. He stressed the importance of unity and dialogue among

						bishops, emphasizing their responsibility in addressing contemporary challenges facing the Church.
91.	4.	Catholic Church	Pope Francis	2018	Francis, Pope. "Address by His Holiness Pope Francis at the Opening of the Synod of Bishops on Young People, the Faith and Vocational Discernment.", 2018.	Pope Francis emphasized the importance of engaging young people in the Church's mission. He called for active listening to the voices of the youth, encouraging a dialogue that fosters understanding and guides them in discerning their faith and vocation.
92.	5.	Catholic Church	Pope Francis	2021	Francis, P. (2021). For a Synodal Church: Communion, Participation, and Mission. Preparatory Document for the 16th Ordinary General Assembly of the Synod of Bishops, (1).	Pope Francis invites the entire Church to reflect on a theme that is decisive for its life and mission: "It is precisely this path of synodality which God expects of the Church of the third millennium." This journey is both a gift and a task: by journeying together and reflecting together on the journey that has been made, the Church will be able to learn through Her experience which processes can help Her to live communion, to achieve participation, to open Herself to mission.
93.	6.	Catholic Church	Society of Jesus	1970	Ganss, G. (1970). The constitutions of the society of Jesus. Institute of Jesuit Sources.	The framework and guiding principles for the Society of Jesus' way of proceeding can be found in its Constitutions. This document also aids many other religious congregations which base themselves on the spirituality of St. Ignatius. The original text was written by St. Ignatius of Loyola with the help of his able secretary, Polanco. Down the centuries it has proved to be a point of reference in the process of discernment and governance.
94.	7.	Catholic Church	Pope Francis	2016	Ivereigh, A. (2016). Pope urges Jesuits to teach discernment in	Pope urges Jesuits to teach discernment in seminaries to counter rigidity.

					seminaries to counter rigidity. catholicvoices.org.uk.	
95.	8.	Catholic Church	Discernment Leadership	2019	Jesuits Global. <i>Discernment and leadership: a Jesuit contribution to the church</i> , June 13, 2019.	It explores the Jesuit perspective on discernment and its relevance to leadership within the Church. It highlights the Jesuit tradition of discernment as a valuable tool for guiding decision-making processes and fostering effective leadership grounded in spiritual discernment principles.
96.	9.	Catholic Church	Management	2015	Kheng, C. (2015). Towards a Normative Philosophical Foundation for Management: Contributions from the Catholic Faith Tradition. <i>Journal of Religion and Business Ethics</i> , 4(2), 5.	Whilst much scholarship has already been done in bringing Catholic doctrine to bear on management, these have largely focused on making business practices more ethical. The article proposes a normative philosophical base for management, pointing out that this has been a lacuna in the field. The Catholic tradition can provide a comprehensive and systematic account of reality, human activity, and management.
97.	10.	Catholic Church	Management	2019	Kheng, C. (2019). What Are They Saying About Church Management? Patterns, Problems, and Considerations for Proceeding. <i>International Journal of Practical Theology</i> , 23(2), 188-205.	The article examines patterns of engagement with management science in Catholic pastoral resources and notes the key conflicts that have arisen.
98.	11.	Catholic Church	DC Pastoral Planning	2023	Kheng, C. (2023). Welcoming the spirit: A communal discernment approach to pastoral planning (OFFICE FOR DISCERNMENT AND APOSTOLIC PLANNING SOCIETY OF JESUS ed.)	The main message of this book is that life and mission in the community require time and space for God to walk gently and lovingly with the people together so that the community experiences transformation and renewed vitality.

99.	12.	Catholic Church	DC	1986	Kolvenbach, P-H. (1986). Sobre el discernimiento apostólico en común.	Far-reaching document of Father Kolvenbach about apostolic DC, based on the experiences of the universal Society of Jesus
100.	13.	Catholic Church	Society of Jesus Community Life	1998	Kolvenbach, Peter-Hans. <i>Letter to the Society of Jesus about Community Life</i> . Edited by Society of Jesus, 1998.	Kolvenbach emphasizes the importance of community life within the Jesuit order. He discusses the significance of fostering strong bonds among members and creating a supportive environment where individuals can grow spiritually and intellectually. Kolvenbach's letter reflects the Jesuit commitment to communal living and mutual support among its members.
101.	14.	Catholic Church	II Vatican Council	1964	Paul VI, P. (1964). Lumen Gentium. Light of the Nations, 29.	The document emphasizes the Church as the People of God, highlighting the role of the laity, religious, and clergy in the ecclesial community. It underscores the universal call to holiness and the active participation of all members of the Church in its mission
102.	15.	Catholic Church	Management Governance	2015	Pfang, R. (2015). Management in the Catholic Church: corporate governance. <i>Journal of Management, Spirituality & Religion</i> , 12(1), 38-58.	Corporate governance is first distilled to identify its key constructs. Relying on source documents, this paper conceptualizes corporate governance within the Church's organizational framework, focusing corporate governance specifically at the level of the individual – the diocesan bishop, rather than at the Supreme Pontiff or his Roman Curia; an ecclesiastical model of corporate governance is thus framed.
103.	16.	Catholic Church	Mission	1964	Rahner, K. (1964). <i>The church and the sacraments</i> . Herder and Herder.	Explores the Church as a fundamental sacrament of salvation, emphasizing its communal nature and mission. Rahner highlights the Church's role as a mediator of grace, integrating the laity and religious in its

						sacramental life, reflecting a deeply ecclesial understanding of the Church.
104.	17.	Catholic Church	Society of Jesus Formula of the Institute	2001	Rambla, J. M. (2001). <i>Vida religiosa... de modo distinto: Regla o fórmula de la compañía de Jesús. Cristianisme i Justícia.</i>	The study has two parts: 1) First, the presentation and annotated edition of the text of the Rule or <i>Formula</i> . 2) Then, the interpretation of said document from the perspective of the current moment of consecrated life.
105.	18.	Catholic Church	St. Paul New Testament	Circa 57 AD	Saint Paul the Apostle. <i>Letter to the Romans</i> 12:1-3., circa 57 CE.	Saint Paul urges believers to offer themselves as living sacrifices to God. He emphasizes humility and the importance of using one's gifts in service to the community, urging readers not to conform to worldly standards but to renew their minds.
106.	19.	Catholic Church	Society of Jesus General Congregation	1966	Society of Jesus. <i>General Congregation 31</i> , 1966.	personal prayer and a deep renewal of community life
107.	20.	Catholic Church	Society of Jesus General Congregation	1975	Society of Jesus. <i>General Congregation 32</i> , 1975.	The Service of Faith and the Promotion of Justice
108.	21.	Catholic Church	Society of Jesus General Congregation	1983	Society of Jesus. <i>General Congregation 33</i> , 1983	Companions of Jesus Sent into Today's World
109.	22.	Catholic Church	Society of Jesus General Congregation	1995	Society of Jesus. <i>General Congregation 34</i> , 1995.	Servants of Christ's Mission
110.	23.	Catholic Church	Society of Jesus General Congregation	2008	Society of Jesus. <i>General Congregation 35</i> , 2008.	With Renewed Vigor and Zeal
111.	24.	Catholic Church	Society of Jesus General Congregation	2016	Society of Jesus. <i>General Congregation 36</i> , 2016.	Companions in a mission of reconciliation and justice
112.	11.	Catholic Church	Society of Jesus DC	2017	Sosa, Arturo. <i>Letter on DC to the whole Society of Jesus</i> . 2017/11, September 27, 2017. (a & b)	The document highlights the importance of discernment as a collective endeavor within the Jesuit community. Sosa underscores the need for Jesuits to engage in discernment together, recognizing it as a crucial aspect of their shared mission and spiritual growth.

113.	12.	Catholic Church	Society of Jesus General Congregations	2016	The Jesuit Curia in Rome. <i>Backgrounder: General Congregations in the Society of Jesus, 2016.</i>	The Jesuit Curia in Rome released a backgrounder in 2016 detailing the significance of General Congregations within the Society of Jesus. These gatherings serve as crucial events for the Jesuit order, providing a platform for discussion, decision-making, and discernment on matters vital to the mission and governance of the Society, shaping its direction and priorities.
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6. Qualitative research

General	Category	Topic	Theory of Reference	Year	Reference article	Summary
114.	1.	Qualitative research	Case study	2008	Baxter, P., & Jack, S. (2008). Qualitative case study methodology: Study design and implementation for novice researchers. <i>The Qualitative Report</i> , 13(4), 544-559.	Qualitative case study methodology provides tools for researchers to study complex phenomena within their contexts.
115.	2.	Qualitative research	Rhetoric Management	2022	Bonet, E. <i>Retórica Y Gestión. Textos Para Una Educación Liberal</i> . Santa & Cole, 2022.	It explores the intersection of rhetoric and management, offering insights for a liberal education. The book delves into how rhetorical skills can enhance managerial practices, contributing to a broader understanding of leadership and communication in various educational contexts.
116.	3.	Qualitative research	Literature review	2019	Booth, Andrew, Diana Papaioannou, and Anthea Sutton. <i>Systematic Approaches to a Successful Literature Review</i> . , 2019.	It provides comprehensive guidance on conducting effective literature reviews. The book outlines systematic methods for searching, evaluating, and synthesizing research literature, offering valuable insights for researchers across disciplines aiming to produce high-quality reviews.
117.	4.	Qualitative Research	Social physics Epistemology	1856	Comte, A. (1856). <i>Social Physics: From the Positive Philosophy of Auguste Comte</i> . C. Blanchard.	Comte's work focuses on how science transforms society, which he sees within the context of knowledge. For Comte, sociology is a positive science (positivism).
118.	5.	Qualitative Research	Inquiry approaches Research design	2018	Creswell, J. W., & Poth, C. N. (2018). <i>Qualitative inquiry & research design</i> (Fourth edition,	The authors explore the philosophical underpinnings, history, and key elements of five qualitative inquiry approaches: narrative research, phenomenology, grounded theory,

					international student edition ed.). SAGE.	ethnography, and case study. The authors also compare the approaches and relate research designs to each of the traditions of inquiry.
119.	6.	Qualitative Research	Case studies	1989	Eisenhardt, K. M. (1989). Building theories from case study research. <i>Academy of Management Review</i> , 14(4), 532-550.	This paper describes the process of inducting theory using case studies—from specifying the research questions to reaching closure. Some features of the process, such as problem definition and construct validation, are like hypothesis-testing research. Others, such as within-case analysis and replication logic, are unique to the inductive, case-oriented process.
120.	7.	Qualitative Research	Case studies	2007	Eisenhardt, K. M., & Graebner, M. E. (2007). Theory building from cases: Opportunities and challenges. <i>Academy of Management Journal</i> , 50(1), 25-32.	This article discusses the research strategy of theory building from cases, particularly multiple cases. Such a strategy involves using one or more cases to create theoretical constructs, propositions, and/or midrange theories from case-based, empirical evidence. Replication logic means that each case serves as a distinct experiment that stands on its own merits as an analytic unit.
121.	8.	Qualitative Research	Grounded Theory	1967	Glaser, B. G & Strauss, A. L. (1967). <i>The Discovery of Grounded Theory: Strategies for Qualitative Research</i> . Chicago, Aldine Publishing Company	The approach to grounded theory is a method for conducting qualitative research that involves generating theory from data rather than using a preconceived theory to guide data collection and analysis. They argue for grounding theory in social research itself— for generating it from the data. They link this position with a general method of comparative analysis and with various procedures designed to generate grounded theory.

122.	9.	Qualitative research	Scientific revolutions	1962	Kuhn, Thomas S. "The Structure of Scientific Revolutions." <i>The Un of Chicago Press</i> , vol. 2, 1962, pp. 90.	It explores paradigm shifts in science, challenging the notion of cumulative progress. It introduces the concept of scientific revolutions, suggesting that scientific development occurs through revolutionary changes rather than gradual evolution, influencing philosophy and sociology of science.
123.	10.	Qualitative research	Interviews	2006	Kvale, Steinar. <i>Dominance through Interviews and Dialogues</i> . vol. 12, SAGE Publications, 2006.	Kvale examines power dynamics in qualitative research interviews, highlighting the interviewer's influence on dialogue. He emphasizes the importance of reflexivity and ethical considerations, urging researchers to acknowledge and mitigate their power to ensure equitable interactions and valid data collection. The work contributes to understanding interview methodologies and their implications for knowledge production.
124.	11.	Qualitative research	Social interaction	2003	Pons, Catalina, Eduard Bonet, and Oriol Iglesias. <i>A Study of Hitchcock's Film "The Rear Window": On how we Interpret Social Actions</i> , 2003.	Their study delves into how viewers perceive and attribute meaning to characters' behaviors, shedding light on the complexities of social interaction depiction in film and its implications for audience understanding.
125.	12.	Qualitative research	Human behavior	1962	Schutz, Alfred. "Common-Sense and Scientific Interpretation of Human Action." <i>Collected Papers I: The Problem of Social Reality</i> . Springer, 1962.	His work scrutinizes the nuanced relationship between everyday understanding and scholarly analysis in comprehending human behavior.
126.	13.	Qualitative research	Social sciences		Shils, E. A., & Finch, H. A. (1949). <i>Max Weber on the methodology of the social sciences</i> . Free Press Glencoe, IL.	Shils explores Weber's perspectives on sociological methodology. It highlights Weber's emphasis on the subjective understanding of social actions, the importance of value-neutrality, and the use of ideal types for

						comparative analysis, contributing significantly to sociological theory and research methods.
127.	14.	Qualitative research	Case studies	2005	Stake, R. E. "Qualitative Case Studies." <i>The Sage Handbook of Qualitative Research</i> . Edited by N. K. Denzin & Y. S. Lincoln. Sage Publications Ltd, 2005.	Stake delves into qualitative case studies in "The Sage Handbook of Qualitative Research," exploring their methodologies, purposes, and applications. This chapter, part of a comprehensive guide edited by Denzin and Lincoln, offers insights into conducting and interpreting case studies within qualitative research paradigms.
128.	15.	Qualitative Research	Case studies	1995	Stake, R. E. (1995). <i>The art of case study research</i> . Sage.	The author outlines the theoretical foundations of case study research and provides practical guidance on how to design, conduct, and analyze case studies. The book covers various aspects of case study research, including sampling, data collection methods, and data analysis techniques.
129.	16.	Qualitative research	Grounded Theory	2014	Thornberg, Robert, and Kathy Charmaz. "Grounded Theory and Theoretical Coding." <i>The SAGE Handbook of Qualitative Data Analysis</i> , vol. 5, no. 2014, 2014, pp. 153-169.	Thornberg and Charmaz contribute to "The SAGE Handbook of Qualitative Data Analysis," delineating the principles and techniques of grounded theory, particularly focusing on theoretical coding, a pivotal aspect of the methodological framework.
130.	17.	Qualitative research	Change Innovation	2000	Van de Ven, Andrew H., et al. <i>Organizational Change and Innovation Processes: Theory and Methods for Research</i> . Oxford University Press, 2000.	This seminal work serves as a guide for understanding the intricate dynamics and processes involved in driving transformative initiatives within organizational contexts.
131.	18.	Qualitative Research	Case studies	2009	Yin, R. K. (2009). <i>Case study research: Design and methods (Vol. 5)</i> . Sage.	The book provides a comprehensive guide to conducting case study research, with a focus on design and methodology. The author explains the philosophical underpinnings of case study research and provides a step-by-step guide to

						the design, conduct, and analysis of case studies. The book covers various aspects of case study research, including defining the research question, selecting cases, collecting and analyzing data, and writing up the case study report.
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Annex B: Case study research methodology

The following case study research methodology is a compilation from Robert Stake’s book “The Art of Case Study Research” (1995)

CHAPTER	DESCRIPTION	TRANSLATION INTO THE PROPOSED RESEARCH CASE																		
		<i>The integration of the Society of Jesus provinces in Spain: a restructuring with Spirit (2008-2014)</i>																		
1 The unique case	<p>Intrinsic interest in the case - "Intrinsic case study"</p> <p>Case study research is not sampling research</p> <p>Selection: maximize what we can learn</p> <p>Do not choose case study designs to optimize production of generalizations</p> <p>The real business of case study is particularization, not generalization</p> <p>There is emphasis on</p> <p style="padding-left: 40px;">uniqueness, on understanding the case itself</p> <p style="padding-left: 40px;">interpretation; progressive focusing (to reach out assertions)</p>	<p>Fr. F. J. Ruiz SJ is a faculty member of the Discerning Leadership program (https://discerningleadership.org/).</p> <p>Since 2021, I became a faculty member of the program and had the opportunity to teach the strategy module together with other colleagues with whom we developed two teaching cases.</p> <p>One of those cases will be translated into research cases following Robert Stake's case study research methodology.</p>																		
3 The nature of qualitative research	<p>Epistemology of qualitative researchers: existential (non determinists) and constructivist</p> <p>Qualitative inquiry is subjective</p> <p>Its contributions to disciplined science are slow and tendentious</p> <p>Substantial ethical risks</p>	<p>According to Stake, “finishing a case study is the consummation of a work of art. A few of us will find a case study (...) the finest work of our lifetime. Because it is an exercise in such depth, the study is an opportunity to see what others have not yet seen (...). The case study is a splendid pallet”.</p>																		
4 Data gathering	<p>The pool of data includes the earliest of observations</p> <p>One of the principal qualification of qualitative researchers is experience, knowing what leads to significant understanding, testing out the veracity of their eyes and the robustness of their interpretations</p> <p>Essential parts: definition of case, list of research questions, identification of helpers, data sources, allocation of time, expenses, intended reporting.</p>	<p style="text-align: center;">SJ provinces in Spain</p> <table border="0"> <tr> <td>Case</td> <td>Integration of five Spanish provinces</td> </tr> <tr> <td>Time span</td> <td>2008-2014</td> </tr> <tr> <td>Coverage</td> <td>Spain</td> </tr> <tr> <td>Interfaces</td> <td>Fr. F. J. Ruiz SJ</td> </tr> <tr> <td>Research question (common)</td> <td></td> </tr> <tr> <td>Research question (specific)</td> <td></td> </tr> <tr> <td></td> <td>Did the integration trigger a bolder apostolic planning?</td> </tr> <tr> <td>Team</td> <td>E. Mogas R. Garcia J. M. Lozano</td> </tr> <tr> <td>Data sources</td> <td>Interviews Internal documents Public data</td> </tr> </table>	Case	Integration of five Spanish provinces	Time span	2008-2014	Coverage	Spain	Interfaces	Fr. F. J. Ruiz SJ	Research question (common)		Research question (specific)			Did the integration trigger a bolder apostolic planning?	Team	E. Mogas R. Garcia J. M. Lozano	Data sources	Interviews Internal documents Public data
Case	Integration of five Spanish provinces																			
Time span	2008-2014																			
Coverage	Spain																			
Interfaces	Fr. F. J. Ruiz SJ																			
Research question (common)																				
Research question (specific)																				
	Did the integration trigger a bolder apostolic planning?																			
Team	E. Mogas R. Garcia J. M. Lozano																			
Data sources	Interviews Internal documents Public data																			

		SJ provinces in Spain
5 Analysis and interpretation	<p>Analysis means essentially taking something apart</p> <p>Two strategic ways that researchers reach new meanings about cases are through</p> <p>direct interpretation of the individual instance and</p> <p>through aggregation of instances until something can be said about them</p>	<ul style="list-style-type: none"> • Key strategic variables in the integration decision process • Strategic options before the integration decision and criteria to finally decide • Processes followed for the decision, design and execution of the new Province • How the explicitation of the strategy contributes to the fulfillment of the Mission • What variables considered for the execution of the design of the new Province
7 Triangulation	<p>Need for being accurate in measuring things and logical in interpreting the meaning of those measurements</p> <p>To gain the needed confirmation, to increase credence in the interpretation, to demonstrate commonality on an assertion, the researcher can use any of several protocols</p> <p>Four strategies for triangulation:</p> <ul style="list-style-type: none"> data source triangulation, investigator triangulation, theory triangulation, and methodological triangulation. 	<p>Validation of descriptions, assertions, interpretations via interviews with team</p> <p>Evaluate the impact of Discernment in Common on Strategic decisions... After 9 years</p> <p>From the identified strategy deployment constructs (Saunders et al., 2008), three of them will drive the measurement of impact</p> <ul style="list-style-type: none"> - Did the level of buy-in achieved improve the acceptance and adoption by stakeholders of the strategic decisions made? More specifically, did a consultative approach through participation increase ownership and commitment? - Did the organization values that govern decisions help ensure alignment between actions and strategic directions? - Did planned strategy and emergent (unplanned) strategy evolve hand-in-hand and interact as strategic initiatives were implemented? More specifically, did this allow the experience gained during deployment to shape ongoing strategy?

8 Writing the report	Entry vignette	I want my readers immediately to start developing a vicarious experience, to get the feel of the place, time.
	Issue identification, purpose and method of study	Although most of my readers care little about my methods, I want to tell them something about how the study came to be, who I am, and what issues I think will help us to understand the case.
	Extensive narrative description to further define case and contexts	I want to present a body of relatively uncontested data, not completely without interpretation, but a description not unlikely they'd make themselves had they been there. If I have a controversial data to present, I am likely to present them, if I can, as views of a contender or witness.
	Development of issues	Somewhere, perhaps in the middle, I want to carefully develop a few key issues, not for the purpose of generalizing beyond the case but for understanding the complexity of the case. It is often here that I will draw on either research or on my understanding of other cases.
	Descriptive detail, docs, quotations, triangulating data	Some of the issues need further probing. This should be the place for the most confirming experiential data. Indicate not only what has been done to confirm the observations (my triangulations) but what has been done to try to disconfirm them.
	Assertions	It is my intent to provide information that allows the readers to re-consider their knowledge of the case or even to modify existing generalizations about such cases. Nevertheless, having presented a body of relatively uninterpreted observations, I will summarize what I feel I understand about the case and how my generalizations about the case have changed conceptually or in level of confidence.
	Closing vignette	I like to close on an experiential note, reminding the reader that the report is just one person's encounter with a complex case.



Annex C: Protocol of interviews

Protocol of interviews. General, open questions

1. What was your role in the process of the integration of provinces?
2. How did you personally experience such participation?
3. Can you describe in detail how did the process work:
 - a. Who participated?
 - b. How were the group dynamics?
 - c. What conclusions/decisions did you walk away with at that time?
4. In perspective, what characteristics of the process contributed the most to the results of the integration (including but not limited to decision, design, and execution)?

Translated into Spanish:

1. ¿Cuál fue su papel en el proceso de integración de las provincias?
2. ¿Cómo vivió personalmente dicha participación? ¿Cómo vivió el espíritu de la integración?
3. ¿Puedes describir cómo se articuló el proceso?
 - a. ¿Quién participó?
 - b. ¿Cómo fue la dinámica del grupo?
 - c. ¿Qué conclusiones/decisiones se tomaron en ese momento?
 - d. Otros aspectos
4. En perspectiva, ¿qué características del proceso contribuyeron más a los resultados de la integración (incluyendo entre otros, decisión, diseño y ejecución)?

Protocol of interviews. Specific, direct questions

Construct #2: Buy-In (Acceptance and Adoption)

1. Introduction: Understand whether the practice of DC improved the level of buy-in from stakeholders - any group or individual who can affect or is affected by the achievement of the organization's objectives, (Freeman, 1984) regarding the strategic decisions made
 - a. Question: In the process of DC based on which the integration of Provinces was carried out, what effect did the participation and consultation that were encouraged have? Did they lead to greater initiative and responsibility and stronger stakeholder commitment?

Construct #3: Alignment (Actions and Strategic Directions)

2. Introduction: Understand whether the values fostered by DC effectively ensured that organizational actions were aligned with the strategic directions
 - a. Question: To what extent did the practice of DC contribute to more closely aligning the provincial government's decisions and the objectives to be achieved to complete integration?

Construct #4: Learning (Continuous Evaluation and Adaptation)

3. Introduction: Understand whether the practice of DC enabled the planned strategy and emergent (unplanned) strategy to evolve together during the implementation of strategic initiatives
 - a. Question: Were the successive steps of integration evaluated? Were the results of the evaluations carried out used to improve the process strategy?

Translated into Spanish should we be required to reference them during the interviews:

Constructo #2: Compromiso (Aceptación y Adopción)

1. Introducción: Comprender si la práctica del Discernimiento en Común mejoró el nivel de aceptación de los grupos de interés - cualquier grupo o individuo que pueda afectar o se vea afectado por el logro de los objetivos de la organización (Freeman, 1984) con respecto a las decisiones estratégicas tomadas.
 - a. Pregunta: En el proceso de Discernimiento en Común con el que se hizo la integración de Provincias, ¿qué efecto tuvieron la participación y la consulta que se propiciaron? ¿Condujeron a una mayor toma de iniciativa y responsabilidad y a un compromiso más firme en las partes interesadas?

Constructo #3: Alineación (Acciones y Direcciones Estratégicas)

2. Introducción: Comprender si los valores fomentados por el Discernimiento en Común aseguraron efectivamente que las acciones organizacionales estuvieran alineadas con las direcciones estratégicas.
 - a. Pregunta: ¿En qué medida la práctica del Discernimiento en Común contribuyó a alinear más entre sí las decisiones del gobierno provincial y los objetivos a realizar para culminar la integración?

Constructo #4: Aprendizaje (Evaluación Continua y Adaptación)

3. Introducción: Comprender si la práctica del Discernimiento en Común permitió que la estrategia planificada y la estrategia emergente (no planificada) evolucionaran juntas durante la implementación de iniciativas estratégicas.
 - a. Pregunta: ¿Se fueron evaluando los sucesivos pasos de la integración? ¿Se aprovecharon los resultados de las evaluaciones realizadas para mejorar la estrategia del proceso?

Written consent form for the interviews:

All interviewees accepted it and gave permission orally – transcripts of the recordings are saved and available upon request.

Programa DBA (Doctorate of Business Administration) – Universidad Pontificia Comillas
Investigador principal: Esteban Mogas, estudiante 3r año del DBA
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**Consent to take part in the preparation of a case about
“Integración de las Provincias de la
Compañía de Jesús en España: una
restructuration con
Espíritu (2008-2014)”**



Purpose of Study: write a research case on the integration process of the provinces of the Society of Jesus in Spain, with the participation of Fr. Francisco José Ruiz SJ.

**Por favor ponga
sus iniciales en
cada casilla si está
de acuerdo con la
declaración**

- | | |
|---|---------------------------------|
| 1. Confirmo que entiendo la investigación anterior. He tenido la oportunidad de considerar la información, hacer preguntas y obtener respuestas satisfactorias. | <input type="text"/> |
| 2. Entiendo que mi participación es voluntaria y que soy libre de retirarme en cualquier momento, sin dar ningún motivo. | <input type="text"/> |
| 3. Entiendo quién tendrá acceso a los datos personales proporcionados, cómo se almacenarán los datos y qué pasará con los datos al final del proyecto. | <input type="text"/> |
| 4. Entiendo que no seré identificable a partir de cualquier publicación. | <input type="text"/> |
| 5. Doy mi consentimiento para que se grabe [audio/video]. | <input type="text"/> |
| 6. Entiendo cómo se utilizarán las grabaciones de audio/videos en los resultados de la investigación. | <input type="text"/> |
| 7. Uso de citas: Por favor indique su preferencia (seleccione una opción): | |
| a) No deseo ser citado. | <input type="text" value="a)"/> |
| b) Acepto el uso de citas en los resultados de la investigación si no soy identificable. | <input type="text" value="b)"/> |
| c) Acepto el uso de citas directas, atribuidas a mi nombre, en los resultados de la investigación. | <input type="text" value="c)"/> |

Template written consent form, version 1.0. October 2023. Adapted from University of Oxford's Research Support Informed Consent. <https://researchsupport.admin.ox.ac.uk/governance/ethics/resources/consent>. Date of access: 15th October 2023.

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Programa DBA (Doctorate of Business Administration) – Universidad Pontificia Comillas
Investigador principal: Esteban Mogas, estudiante 3r año del DBA
202109697@alu.comillas.edu

8. Doy permiso para que me contacten nuevamente para aclarar información.

9. Entiendo cómo plantear una inquietud o presentar una queja.

10. ~~Acepto participar.~~

Name of participant

dd / mm / yyyy
Date

Signature

Name of person taking consent

dd / mm / yyyy
Date¹

Signature

¹ To be signed and dated in the presence of the participant. Once this has been signed by both parties the participant should receive a copy of the signed and dated participant consent form. The original signed and dated consent form should be kept with the project's main documents, which must be kept in a secure location.

Template written consent form, version 1.0. October 2023. Adapted from University of Oxford's Research Support Informed Consent. <https://researchsupport.admin.ox.ac.uk/governance/ethics/resources/consent>. Date of access: 15th October 2023.

Annex D: Teaching Case: Integración de las provincias de la Compañía de Jesús en España: una reestructuración con Espíritu (2008-2014)

Integración de las Provincias de la Compañía de Jesús en España: una reestructuración con Espíritu (2008-2014)

Esteban Mogas
Josep M. Lozano
Ramon Garcia



Esade Business School, Barcelona
ver. 5 Julio 2022

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1. La decisión

Era el año 2006 y el entonces Provincial de España desde 2004, Elías Royón SJ,¹ con responsabilidades de coordinación de las cinco provincias en España, lanzó la pregunta a la mesa de Provinciales: “¿Qué hacemos con la integración de nuestras provincias? Tenemos que afrontar este reto y la realidad que prevemos para los próximos quince años”. Los Provinciales decidieron llevar el tema a sus respectivas consultas, pero no se encontró un apoyo sustancial.

Algunas de las razones fundamentales en ese momento en contra del eventual proceso de integración incluían:

- La repercusión negativa de la cercanía temporal de un intento de integración parecido, que finalizó en fracaso (2003)
- Varias Provincias estaban convencidas de que disponían de capacidad apostólica aún suficiente, al menos, para el corto/medio plazo
- Dudas, en el caso de acometer la integración, sobre si se habían de implicar todas las Provincias conjuntamente creando una sola, o si habían de hacerlo en dos grupos separados (de dos y tres Provincias)
- Desnivel de concienciación entre los Provinciales y sus Consultas, en general. El proyecto lógicamente despertaba más reticencias cuando se carecía de una visión global de la situación de la Compañía de Jesús en todo el territorio
- Dificultad del proyecto mismo: representaba un desafío de enormes dimensiones, sobre el que no existía un imaginario previo que ayudara a visualizar el final del proceso

Al mismo tiempo, surgían preguntas fundamentales que miraban el bien más universal más allá de las coyunturas exitosas o fracasadas, y que activaba la dinámica de calcular lo que se ganaba o se perdía como Provincia singular:

- ¿eran las fortalezas apostólicas actuales en algunas Provincias aparentes y se podían transformar en debilidades en el medio y largo plazo?
- ¿tenía sentido dejar fenecer algunas Provincias, más débiles, y dejar sobrevivir solo las más fuertes?

En España, los Provinciales ya habían impulsado, en la Consultas regulares del Provincial de España, la colaboración y la coordinación entre los diversos sectores apostólicos de las cinco Provincias existentes desde el año 2004: Aragón, Bética, Castilla, Loyola y Tarraconense.

Pero la pregunta seguía abierta: ¿eran esas coordinaciones y colaboraciones interprovinciales suficientes para que cada Provincia pudiera prestar por sí sola el “mayor y mejor servicio posible” desde el modo de proceder ignaciano?



Ilustración 1: Provincias de la Compañía de Jesús en España desde 2004

¹ Elías Royón SJ fue, desde 1995 hasta 2004, consejero del Padre General Peter-Hans Kolvenbach SJ y Asistente de la región jesuítica de Europa Meridional, cargos que ejerció desde Roma. Previamente ya había ocupado el cargo de provincial de España entre 1993 y 1995.

Una evaluación sobre dicha capacidad para generar una realidad comunitaria y apostólica nueva podía indicar que el recorrido hecho había alcanzado su límite. La figura del Provincial de España podía necesitar un nuevo marco que le dotara de autoridad suficiente como para tomar decisiones vinculantes.

La Congregación General (CG) 35 de la Compañía de Jesús, que concluyó en Roma a comienzos de 2008, pedía al P. General Adolfo Nicolás SJ, la puesta en marcha de un proceso de reflexión sobre las Provincias de la Compañía en

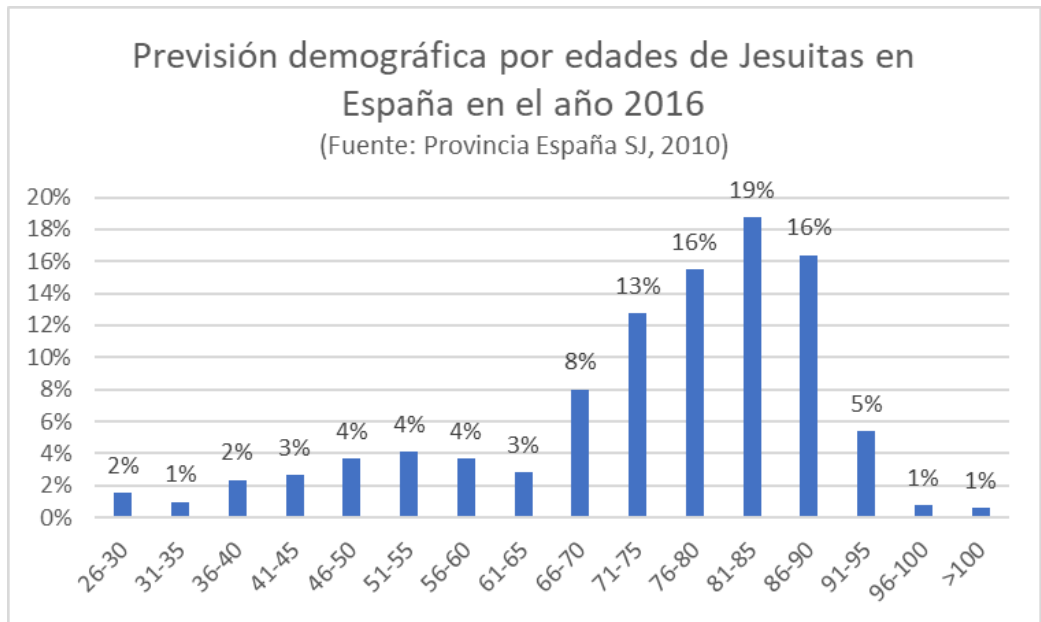


Ilustración 2: Previsión demográfica de jesuitas en España en 2016

el mundo, con el objetivo de servir mejor a la misión

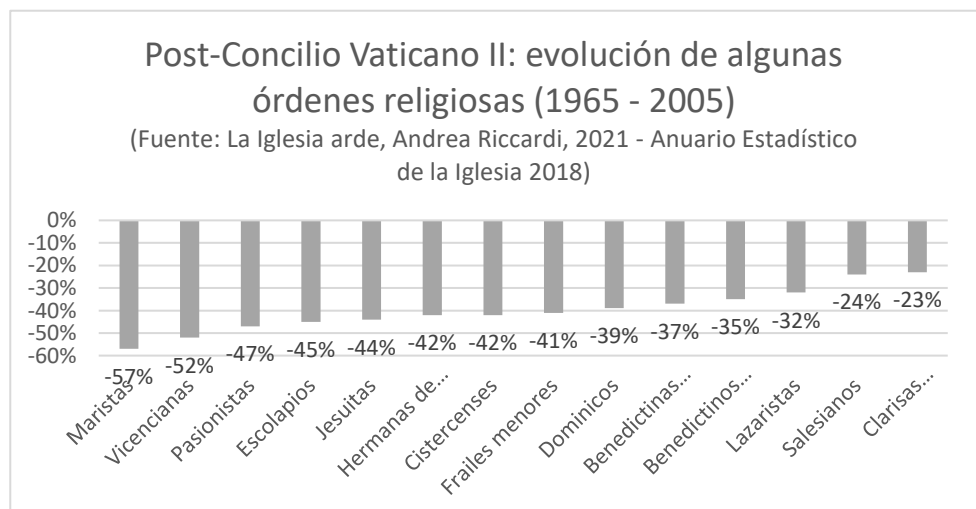
universal. Dicho proceso debía incluir “la revisión completa de los criterios para la creación, reconfiguración y supresión de Provincias y Regiones: tamaño numérico y geográfico, distribución de edades, disposición de personas para el gobierno y la formación, viabilidad económica y capacidad para desarrollar un plan apostólico que respondiera a las necesidades locales, regionales y universales.”²

2. El contexto

2.1. Las órdenes religiosas a nivel mundial y el sentimiento religioso en España

La etapa post-Concilio Vaticano II hasta el año 2005 mostró una caída del número de miembros en las órdenes religiosas

más importantes del mundo. Durante 40 años, el rango de disminuciones se situó entre un 57% en el caso de los Maristas y un 23%-24% en el caso de los Salesianos y las Clarisas.³ En el caso de los Jesuitas, dicha



² Congregación General (CG) de la Compañía de Jesús 35, decreto 5, n. 26

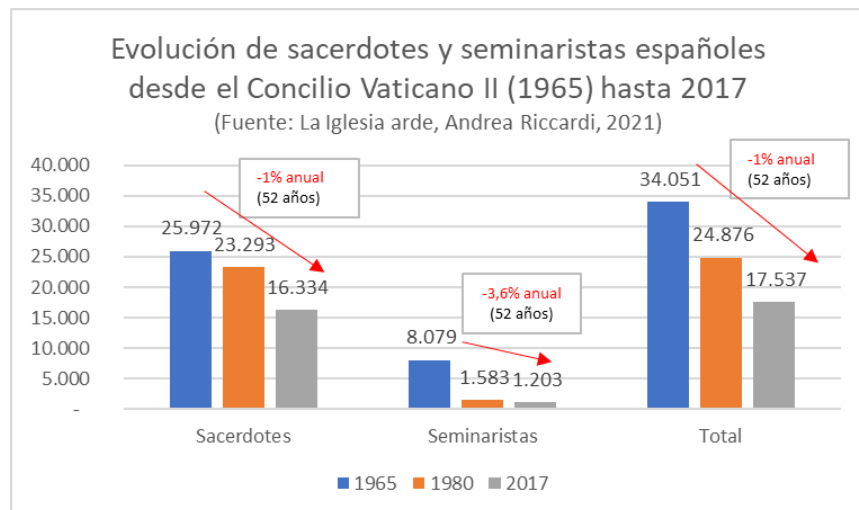
³ La Iglesia arde, Andrea Riccardi, 2021 - Anuario Estadístico de la Iglesia 2018.

disminución se situaba en el 44%.

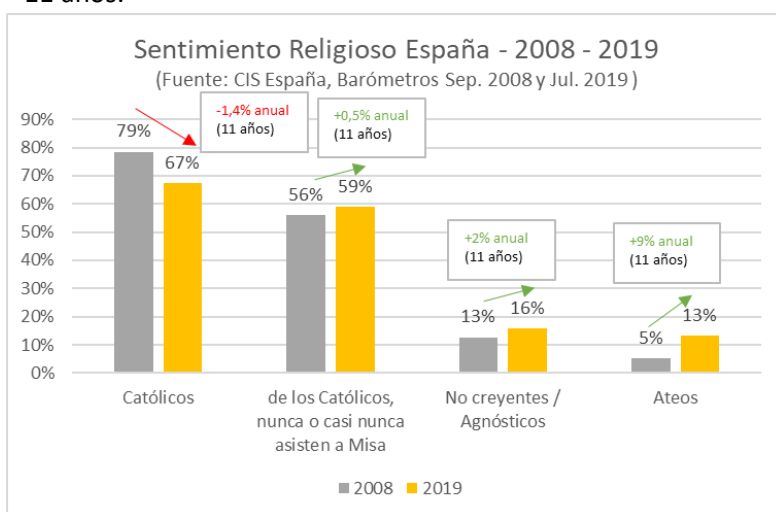
Al mismo tiempo, *Ilustración 3: Post-Concilio Vaticano II: evolución de algunas órdenes religiosas (1965 - 2005)* se constataba (y

se sigue constatando) un fenómeno entre los religiosos/as que iba contra corriente: la valentía con que las mujeres y hombres consagrados vivían su trabajo y servicio. Muchos de esos nuevos mártires cayeron bien por su avanzada edad, bien por su decisión de seguir prestando su servicio incluso en situaciones difíciles. Muchos fueron víctimas, entre otros, de las mafias, de las guerras, de la criminalidad, de las epidemias y del odio religioso.

En España, la disminución del número de sacerdotes y seminaristas fue casi de la mitad en el período comprendido entre el Concilio Vaticano II y el año 2017. Durante 52 años, la disminución anual fue del 1%.⁴ Debido a la fuerte caída de seminaristas en el año 1980, se anticipaba una caída aún más acusada en el futuro.



En cuanto al sentimiento religioso, en el año 2008 había un 79% de la población que se declaraba católica, de la cual más de la mitad (56%) no iban a Misa nunca o casi nunca. El 18% de la población se declaraba no creyente o atea. Esa nueva realidad se fue consolidando en los siguientes 11 años, más que doblándose ese último colectivo hasta pasar a ser el 29% de la población. Entre el año 2008 y el 2019, los católicos en España pasaron del 79% al 67%, una disminución del 1,4% anual durante 11 años.⁵



La identificación de la gente con realidades comunitarias (órdenes religiosas y la Iglesia en general) fue dando paso a una reivindicación de la autonomía individual y el valor profético de la vida religiosa y consagrada siguió su lento y constante declive.

⁴ La Iglesia arde, Andrea Riccardi, 2021

⁵ Centro de Investigaciones Sociológicas (CIS) España, Barómetros septiembre 2008 y julio 2019.

2.2. El contexto español de la Compañía de Jesús

La disminución continuada de las vocaciones en los últimos años y la evolución de la situación demográfica de las Provincias de 2010 hasta 2020 anticipaban una disminución de casi 600 jesuitas o un 58% acumulado en diez años.

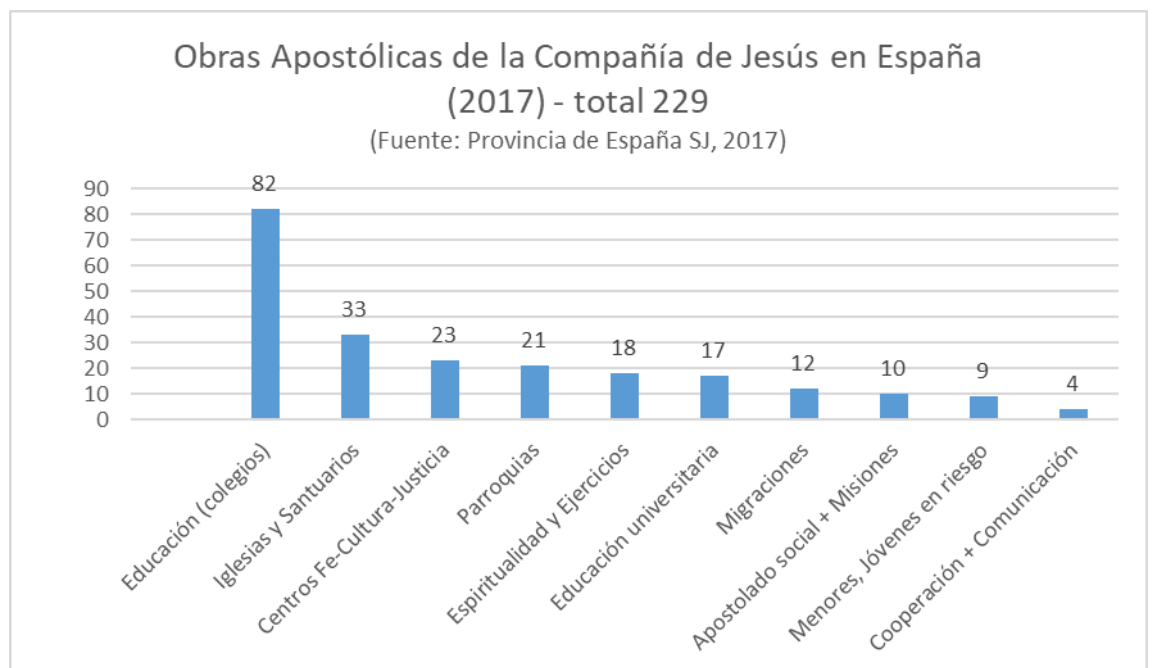
Además, en el contexto global de la misión de entonces, la CG 35 impulsó a “mejorar el gobierno de las Provincias” situándolas en un contexto más amplio, que en el caso de España era el entorno europeo.⁶ En clave de *magis* ignaciano, se pedía atrevimiento en el modo de trabajar apostólicamente y eso requería una actitud *transnacional* y *transcultural*.

Se abría al mismo tiempo una nueva identidad ensanchada, la experiencia de un “nosotros” un tanto nuevo. Los jesuitas se sentían invitados a entenderse en colaboración con el laicado, religiosos y agentes de Iglesia, y con quienes compartían un mismo horizonte de cambio. Ese salto cualitativo pertenecía al proceso y, de hecho, era una cierta condición de posibilidad. Aclarar la participación real del laicado en el proceso de integración se convirtió en un reto en clave de “misión compartida”: por un lado, era un tema de los jesuitas; pero, por otro, el proceso de integración iba a afectar al laicado.

La valoración de la integración de la Compañía de Jesús en España estaba condicionada por dos factores específicos:

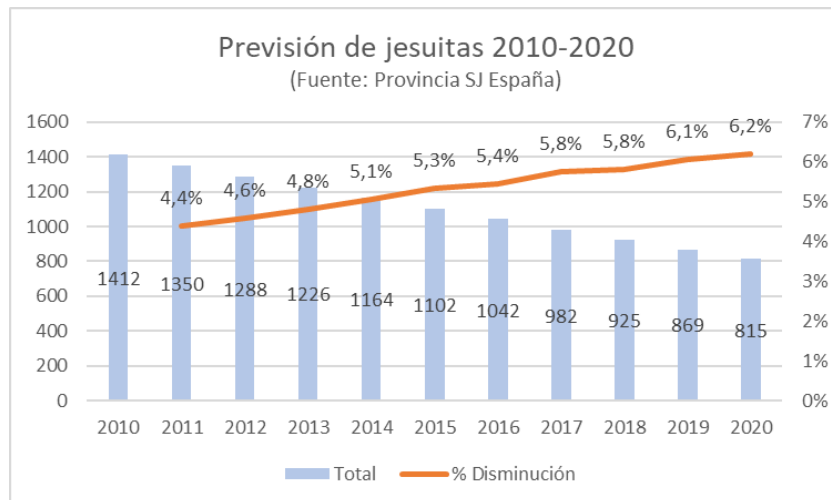
1. las grandes dimensiones de la Provincia que se creaba – más de 1.000 jesuitas y de 300 instituciones y obras apostólicas – que una vez clasificadas con nuevos criterios se redujeron en algo más del 20%.
2. el proceso de disminución de jesuitas que se padecía – más de 50 jesuitas fallecidos por año.

En su alocución a la CG 35, Benedicto XVI, reconocía la vocación de la Compañía de Jesús de estar en las fronteras. El contexto descrito con anterioridad son



⁶ CG 35, decreto 5, n. 25.

territorios de frontera, es decir todos aquellos espacios donde la humanidad se quiebra o se pone en cuestión. Y también aquellos otros en que la presencia de la Iglesia, o incluso de lo religioso, comienza a ser puesta en cuestión, ignorada, mirada desde prejuicios o abiertamente rechazada. Esos espacios eran (y tal vez siguen siendo) cada vez más extensos y más problemáticos. En las circunstancias de disminución y de búsqueda de nuevas fronteras, había que afrontar cuestiones esenciales en el momento actual de la Vida Religiosa.



Parecía que la respuesta más conveniente a estos desafíos pasaba por iniciar un proceso para la elaboración de un Proyecto Apostólico común a todas las Provincias y, en consecuencia, por la creación de una nueva Provincia que integrara las cinco actuales. Un proyecto que respondiera con creatividad a las opciones de la Compañía de Jesús formuladas en las últimas Congregaciones Generales.

7

3. La propuesta y la aprobación

A finales del año 2008, la mesa de Provinciales de España tomó la decisión de lo que veían como necesario e inaplazable: la integración de provincias mediante la creación de una Provincia nueva, sobre la base de la propia experiencia de gobierno de los Provinciales, sus respectivas Consultas, un diagnóstico compartido y el apoyo del Padre General Adolfo Nicolás SJ – quien había dado su visto bueno al proyecto durante una conversación en el tramo final de la CG 35 que finalizó en marzo de 2008.

La actuación de la máxima autoridad de la Compañía, para un proceso tan complejo, fue esencial. Visibilizó un mecanismo muy propio del estilo de proceder de la Compañía, en el que el ejercicio de la autoridad está concebido como un modo de concretar el discernimiento y derivarlo a una decisión concreta. En esa tradición, la decisión de un General es un cierto punto de no retorno: decidida la integración, ya no era legítimo volver sobre su posibilidad o no, sino que había que ponerla en marcha.

La intuición era que juntos y todos, los jesuitas de las cinco Provincias (Aragón, Bética, Castilla, Loyola y Tarraconense), junto con sus colaboradores, afrontarían mejor la misión evangelizadora que la Compañía de Jesús podía realizar en España en ese momento.

La integración ayudaría a afrontar la situación general de inviabilidad de las Provincias españolas. A pesar de las diferencias (no todas las Provincias se hallaban en el mismo estado misional de fortaleza

⁷ Proceso de Integración de las Provincias de la Compañía de Jesús en España. Jesuitas de España. 2010.

o debilidad), optar por una Provincia se aceptó como la mejor solución para acometer el futuro de la Compañía de Jesús en España.

Además, la opción por una sola Provincia alimentaba también un eje carismático: la unidad hablaba de universalidad, de visión común, de realidad comunitaria y apostólica compartida. Una integración parcial carecía de ese impacto.

El 28 de octubre de 2008, el P. Elías Royón SJ mandó, junto con los cinco Provinciales, una carta al Padre General Adolfo Nicolás SJ, solicitando su aprobación para iniciar el proceso de integración de Provincias. A dicha carta se adjuntaron las Actas de las Consultas recientes y dos documentos que recogían el fruto de sus deliberaciones: "Presupuestos del proceso de integración "y "Proceso de integración".

En dicha carta se comentaba el laborioso itinerario que habían seguido en esos últimos años, encaminado a reforzar todo lo posible la coordinación apostólica interprovincial y, desde la situación de entonces de la Compañía en España, subrayaba que habían llegado a la conclusión de que la colaboración integrada no era ya suficiente para desarrollar un plan apostólico que respondiera a las necesidades locales, regionales y universales.

Se anticipaba entonces que el proceso de integración se desarrollaría en dos momentos diferenciados:

- El primero sería una fase transitoria, cuya duración prevista inicialmente abarcaría desde 2010 a 2016, en la que las cinco Provincias de entonces continuarían existiendo.
- El segundo momento se iniciaría con la erección de la Provincia en 2016.

El Padre General aprobó la propuesta de erigir una sola Provincia que abarcara todo el territorio del Estado y las líneas generales del proceso, y al mismo tiempo animaba a todos los jesuitas de las Provincias a contribuir al proceso "con abundancia de generosidad y disponibilidad". El proceso se iniciaba con la mirada puesta en el mayor y mejor servicio a la Iglesia y a la sociedad, y para que la Compañía pudiera continuar prestando su misión con renovado impulso y fervor. En palabras del P. General, se trataba de acometer un proceso de "reestructuración con Espíritu" considerando un modo de proceder que entrara en una dinámica espiritual similar a la que se había desarrollado hasta entonces, y en ir construyendo el futuro en abundancia de generosidad y disponibilidad. Era el 14 de noviembre de 2008, fiesta de San José Pignatelli.

4. El diseño de la nueva Provincia (2008 – 2010)

4.1. Los nuevos desafíos apostólicos

En julio de 2009, una Comisión interprovincial redactó un documento orientador para la elaboración del Proyecto Apostólico de la nueva Provincia: *Contemplación de la realidad a la que somos enviados*⁸. Pretendía recoger en visión de conjunto las grandes cuestiones sociales y eclesiales que desafiaban entonces a la Compañía en España, y ayudar a conocer más profundamente las gentes y el trasfondo de la realidad social y eclesial a las que los jesuitas estaban enviados apostólicamente. El documento aspiraba a sensibilizar para poder ocuparse "con creatividad de respuesta a los nuevos desafíos apostólicos y con sensibilidad para dejarse afectar por las gentes sufrientes" (P. General Adolfo Nicolás SJ). Dicho acercamiento, o diagnóstico de la realidad, destacaba las siguientes características:

⁸ Documento de Contemplación de la realidad a la que somos enviados. Proceso de Integración de Provincias de España. Comisión del Proyecto. Julio 2009

- Proceder con una perspectiva histórica, que permitiese ver el presente como el resultado de un proceso que arranca de la modernidad y se completa con la posmodernidad.
- Situar la realidad española en el contexto de la globalización, sin olvidar la inserción en la Unión Europea y en Europa.
- Dar una relevancia especial a la Iglesia (universal y española), puesto que ella es el marco específico en que la Compañía desarrolla su actividad.
- Destacar algunos colectivos que parecían especialmente significativos en este contexto, tanto por el relieve que tenían y tienen en sí mismos, cuanto por la relación que la Compañía había tenido y tenía con ellos. Se trataba de territorios de frontera.

El proceso de diseño de la integración de provincias quedó reflejado en el documento *Proceso de Integración de las Provincias de la Compañía de Jesús en España* que se socializó con todos los miembros de la Compañía de Jesús a finales de 2010 y donde se detallaban los pilares estratégicos de dicho proceso: el nuevo Proyecto Apostólico, la Revitalización del cuerpo apostólico, la Estructura de gobierno para la fase transitoria (entonces hasta 2016), la Estructura de gobierno para la nueva Provincia (entonces a partir de 2016), los nuevos Sectores apostólicos y las nuevas Plataformas apostólicas.

4.2. El nuevo proyecto apostólico

El proyecto definía la Misión de la Compañía en España, anuncio y testimonio de Jesucristo y del Reino de Dios desde la Iglesia y en colaboración con otros, y enumeraba las diversas opciones, distinguiendo entre las más básicas, que hacían referencia al “ser”, y las más complejas, que requerían más matices y contribuciones, referidas al “hacer”:

1. Cuidar “con renovado impulso y fervor” la vida y misión del Cuerpo Apostólico
2. Renovar nuestro sentir en y con la Iglesia desde el carisma ignaciano
3. Impulsar la misión compartida entre jesuitas y colaboradores
4. Fortalecer la identidad, ignaciana y jesuita según los casos, de las obras e instituciones, para que sean testimonios visibles y creíbles del Evangelio
5. Promover el apostolado intelectual, de personas e instituciones, al servicio de la misión, trabajando con rigor, creatividad, dedicación, innovación y de manera intersectorial.
6. Acompañar y educar el crecimiento humano y cristiano de niños, adolescentes y jóvenes
7. Promover el laicado en la Iglesia y contribuir a su misión y formación
8. Promover una ciudadanía comprometida, responsable y participativa, y una sociedad solidaria y justa
9. Acompañar, servir y defender a los pobres y excluidos como exigencia de nuestra fe
10. Comprometerse personal, comunitaria e institucionalmente en la promoción de vocaciones a la Compañía de Jesús

La Visión para el año 2016 enfatizaba el seguimiento de Jesús, la revitalización de las comunidades, las nuevas vocaciones, las fronteras, los pobres y excluidos, el laicado ignaciano, la pluralidad de nacionalidades y la Compañía universal.

4.3. Revitalizar la misión y vida del cuerpo apostólico

La nueva Provincia tiene como objetivo y motivación la Misión que, desde el modo de proceder ignaciano, quiere prestar el “mayor y mejor servicio posible”. La prioridad absoluta de Dios en las vidas de los jesuitas y la atención al modo de ser son inseparables de dicha razón de ser. Y todo ello lo hace viviendo en actitud de continua conversión y con un estilo de evangelización marcado por la cercanía a los pobres, el rigor intelectual, la búsqueda de nuevos lenguajes y el discernimiento. La

Misión de la Compañía de Jesús en España es anunciar y ser testigos de Jesucristo y su Reino, personal, comunitaria e institucionalmente, desde la Iglesia y en colaboración con otros.

En una sociedad secularizada y plural, los jesuitas se sienten llamados a:

- Promover la justicia que brota de la fe para contribuir así a la construcción de una sociedad más justa, solidaria y abierta a Dios.
- Acompañar a personas y grupos, desde la espiritualidad ignaciana, en la búsqueda de sentido e interiorización, así como en su crecimiento humano y cristiano.
- Anunciar, animar y celebrar la fe de los creyentes mediante los ministerios de la palabra y los sacramentos.
- Estar en las fronteras, tendiendo puentes de reconciliación y de diálogo.

El proceso de integración podía convertirse en una simple reestructuración organizativa si no se reavivaban el don del carisma recibido y la gracia que configuran la identidad ignaciana. La reestructuración con Espíritu tenía que ser fiel y mantener viva la llama de su inspiración original, para “encender otros fuegos”.⁹ Como apuntaba San Ignacio en las Constituciones, para mantener y aumentar todo el cuerpo de la Compañía “en su buen ser, es menester en Él solo poner la esperanza”.¹⁰

Pero a la vez había que planificar y preparar el futuro, priorizar e identificar acciones concretas. Un futuro que, sin embargo, había que preparar esperando con confianza en Él y acogiendo con humildad su Palabra.

Las líneas que inspiraban actuaciones incluían la identidad, la comunidad y la misión. En cuanto a los ámbitos y medios de actuación, se contemplaban el modo de proceder, la unión de corazones, la misión como envío y la comunidad local.

5. Fase transitoria (2010-2014)

Con el fin de preparar y facilitar el paso del funcionamiento de los gobiernos de las cinco Provincias de entonces al del gobierno de la nueva Provincia de posibilitar la progresiva puesta en práctica del Proyecto Apostólico de la nueva Provincia, se establecieron unos principios a modo de orientación. Se le atribuía al Provincial la autoridad necesaria para conseguir los objetivos propuestos y se definieron dos nuevos instrumentos estratégicos:

1. Los Sectores apostólicos: conjuntos de obras, instituciones y presencias personales dedicadas a una actividad apostólica semejante.

⁹ CG 35, d. 2, n. 1

¹⁰ Constituciones de la Compañía de Jesús. Parte X: “De cómo se conservará y aumentará todo este cuerpo en su buen ser”. http://www.documentacatholicaomnia.eu/03d/1491-1556_Ignatius_Loyola_Constituciones_de_la_Compania_de_Jesus_ES.pdf. Fecha de acceso: 10 febrero 2022.

2. Las Plataformas apostólicas: conjunto de comunidades, obras, instituciones y presencias radicadas en una ciudad o zona geográfica limitada.



La estructura de gobierno para esta fase quedaba concretada en dos líneas básicas:

1. Mantener sustancialmente la vigente estructura de gobierno de la Compañía de Jesús en España,
 - a. con el Provincial como coordinador del conjunto y responsable del proceso de creación de la nueva Provincia.
 - b. Y con los demás Provinciales como encargados del gobierno de las propias Provincias
2. En perspectiva siempre hacia la integración final:
 - a. traspasar sucesivamente los diversos sectores apostólicos a la jurisdicción y gobierno directo del Provincial
 - b. Simultáneamente los demás Provinciales continuaban gobernando el resto de las actividades apostólicas de sus Provincias y todas las comunidades, excepto las de Formación y atendían la implantación y el desarrollo de las Plataformas apostólicas en sus Provincias

El reparto de funciones y responsabilidades apuntaba que al Provincial de España le correspondía la promoción y ordenación de cuanto se relacionaba con el logro de los objetivos en orden a la erección de la nueva Provincia. Y a los Provinciales territoriales se les asignaba gobernar los Sectores y actividades apostólicas de las propias Provincias no transferidas a la jurisdicción del Provincial y gobernar todas las comunidades de sus Provincias. Se indicaba también que, en igualdad de condiciones y acorde con las líneas del proyecto apostólico, se tendría en cuenta en el discernimiento priorizar las necesidades de las obras e instituciones de los Sectores apostólicos transferidos a la jurisdicción del Provincial de España, sobre las necesidades de las Provincias.

Además, el Provincial contaba con cuatro mecanismos de apoyo al gobierno: su propia Consulta de gobierno, formada por los otros cinco Provinciales; el Equipo de los delegados de los Sectores apostólicos transferidos; el personal de la Curia; la Comisión para el seguimiento del Proyecto apostólico y la planificación (formada por los cinco Provinciales, los delegados de los Sectores apostólicos transferidos al Provincial de España y su propio Administrador).

La Comisión para el seguimiento del nuevo proyecto apostólico tomaba una especial relevancia puesto que sus funciones incluían seguir la elaboración y posterior aplicación de los Proyectos

Apostólicos de los diversos Sectores transferidos; garantizar la necesaria articulación intersectorial, la complementariedad de los Sectores y Plataformas apostólicas; y la ejecución de los proyectos comunes a todos o a varios sectores priorizados en su momento por el Proyecto Apostólico o por el Provincial de España.

Durante la fase transitoria cada jesuita mantenía su pertenencia a la Provincia a la que estaba adscrito, y los aplicados a Provincias distintas de la suya mantenían su aplicación, mientras los respectivos Provinciales no establecieran otra cosa.

Sobre los aspectos económicos, cada una de las Provincias conservaba sus propiedades y las de sus casas y obras apostólicas, hasta la constitución de la nueva Provincia. Le correspondía al Provincial de España administrar las obras e instituciones apostólicas transferidas a su jurisdicción y, en consecuencia, aprobar los presupuestos ordinarios; y someter los eventuales gastos o presupuestos extraordinarios de las obras e instituciones a la aprobación del Provincial respectivo. Cada Sector apostólico transferido confeccionaría su propio presupuesto de los gastos derivados de la gestión de los mismos.

6. La nueva Provincia (a partir de 2014)

6.1. Estructura de gobierno

La integración dotó a la Compañía en España de una nueva organización:

- se creó una Provincia, con un único Provincial, sin Viceprovinciales o Regionales.
- con dos novedades:
 - o la delegación para la Tercera Edad y su Preparación (DTEP), con competencia para recibir la cuenta de conciencia de más de 600 jesuitas; y
 - o la delegación de plataforma apostólica (PA), con competencia para la *cura apostolica* de la misión local de la Compañía.

La creación de la DTEP fue una de las decisiones más difíciles puesto que suponía, en cierto modo, “dividir” la autoridad del Provincial por razón de la edad de los jesuitas. Pero, paradójicamente, la integración necesitaba un trato diferencial para más de la mitad de los jesuitas de la nueva Provincia.

Una vez estuviesen transferidos al Provincial de España a lo largo de la fase transitoria, y después de una adecuada evaluación de su funcionamiento, todos los Sectores Apostólicos, éste con su Consulta solicitaría al P. General la erección de la nueva Provincia.

La potestad del Provincial se extiende por igual, en virtud de su cargo, a todo su territorio y a todos sus miembros, comunidades y obras apostólicas. Corresponde al Provincial fomentar la vida religiosa, la formación, los ministerios apostólicos, la observancia de las Constituciones y velar por la administración de los bienes temporales, buscando siempre y en todas las cosas el mayor servicio de la Iglesia de Cristo. Y también hacer la visita de las casas y obras de la Provincia y recibir la cuenta de conciencia de los miembros de la Provincia.

A la estructura de apostólica y de gobierno se le añaden los Sectores Apostólicos, que disponen de órganos propios de gobierno para ayudar a las obras e instituciones integrantes a conseguir sus objetivos apostólicos en el conjunto del Proyecto Apostólico. A la estructura se le añaden las Plataformas Apostólicas, con la finalidad de armonizar la unidad con la peculiaridad eclesial, cultural, histórica y lingüística de las Provincias actuales, y para atender adecuadamente a las características de las realidades locales y territoriales que condicionan la acción evangelizadora, dándoles respuesta apostólica. Dichas plataformas se configuran en dos tipos:

1. Plataforma apostólica local (PAL): conjunto de comunidades, obras, instituciones y presencias, radicadas en una ciudad o zona geográfica limitada
2. Plataforma apostólica territorial (PAT): formada por varias PAL radicadas en un territorio, con tales características eclesiales, culturales, históricas y lingüísticas, que por sí mismo constituye un contexto propio de misión.

Para una mayor eficacia apostólica, se dotaba a ambas Plataformas apostólicas de las oportunas instancias delegadas de representación y coordinación, y significaban una tentativa de armonizar la unidad con las peculiares características eclesiales, culturales, históricas y lingüísticas de las Provincias.

Se practicó la “descentralización” no sólo como una transacción, sino como un modo de querer dar un estilo propio a la nueva Provincia.

No obstante, las sensibilidades provinciales (no sólo las de las antiguas Provincias de Loyola y Cataluña) no desaparecieron del todo y compartieron un sentimiento general de “pérdida”. Al fin y al cabo, “morían” Provincias - con sus referencias, sus tradiciones, sus relatos compartidos y sabidos.



Para el buen gobierno de la Provincia, se crearon siete órganos para ayudar al Provincial:

1. Consultores del Provincial
2. Comisión para el seguimiento del Proyecto Apostólico y la planificación
3. Delegados de los Sectores apostólicos
4. Delegado para la Tercera Edad y su preparación
5. Delegados para las PAL
6. Delegados para las PAT
7. Superiores locales

6.2. Sectores apostólicos y Plataformas Apostólicas

El equilibrio entre *cura personalis* y *cura apostolica*, entre la unidad y la diversidad, quedaba garantizada mediante la figura del Provincial, al mantener toda la autoridad que le otorgaba el derecho propio de la Compañía y al tratar de integrar y compaginar ambos cuidados, sin perder de vista la misión de la Provincia y su proyecto evangelizador. Por otra, las Plataformas apostólicas, locales y territoriales, significaban una tentativa de armonizar la unidad con la peculiaridad.

Los Sectores apostólicos y las Plataformas apostólicas querían, pues, complementarse en la realidad común que se constituía.

En concreto, las Plataformas apostólicas deseaban realizar tres objetivos:

1. Crecer en coordinación y colaboración comunitaria y apostólica allí donde la Compañía de Jesús estaba implantada localmente y a través de la implicación mayor del Superior local.
2. Mantener aquel nivel de representación institucional de la Provincia de la Compañía de Jesús en España que pareciese esencial en las ciudades y territorios que atendían las antiguas Provincias.
3. Responder apostólicamente con más eficacia a específicos “contextos de misión”.

Para el conjunto de obras, instituciones y presencias personales dedicadas a una actividad apostólica semejante, que encarnaban la misión de la Compañía de acuerdo a su formulación en la CG35, se identificaron cinco sectores que se transfirieron en el siguiente orden: la Formación y vocaciones, la Educación, la Educación Universitaria (UNIJES), el Apostolado Social y, por último, la Pastoral. Las tareas asignadas para su lanzamiento incluían:

- la definición de los mapas de cada Sector apostólico en las Provincias
- el diseño de la estructura organizativa para cada sector apostólico
- el planteamiento de destinos interprovinciales
- y el diseño de experiencias interprovinciales

7. Reflexiones sobre el proceso de integración

La integración sirvió para activar la planificación apostólica que necesitaba la Provincia de una manera más integral y decisiva a como se estaba realizando anteriormente. Tener un único proyecto apostólico dio un argumento de fondo a la integración – la Provincia unificada se había creado para hacer posible el proyecto apostólico común– y ayudó a establecer objetivos apostólicos convergentes en todos los niveles de organización de la Provincia: comunidades, obras, plataformas apostólicas y sectores apostólicos.

Así mismo, el fortalecimiento del discernimiento común, de la colaboración y del trabajo en red creció como consecuencia de la nueva organización. Y el propio proceso de integración ayudó a reforzar dicho modo de proceder.

Iniciada ya la puesta en marcha de la nueva Provincia, algunas preguntas seguían abiertas... ¿Supuso el proceso de integración un salto cualitativo de universalidad? ¿Conectó a los jesuitas con otros referentes personales, comunitarios y apostólicos en España? ¿Significó la integración una ayuda para que se reconocieran mejor los numerosos laicos colaboradores de las antiguas Provincias e intentaran dar, por parte de los jesuitas, pasos hacia delante en la cultura de la misión compartida?

En el contexto de disminución de jesuitas (que precisaría de un discurso espiritual y apostólico sobre su significado para apoyar futuras decisiones), la integración no fue la solución para paliar dicho decrecimiento, pero sí ayudó a afrontar cuestiones esenciales en el momento actual de la Vida Religiosa:

- reflexión sobre el papel del jesuita y de la comunidad en la obra apostólica;
- elaboración del modelo de misión compartida con el laicado, compatible con el carisma de la Compañía;
- desarrollo de las redes y sus potencialidades para la misión de la Compañía.

El cambio de los roles tradicionales de gobierno jesuítico que exigía la integración generó resistencias en su aceptación. En concreto,

- el mayor acento de la *cura apostolica* de la nueva figura del Provincial – en detrimento de una *cura personalis* más inmediata y familiar, que debería entenderse como una oportunidad para recuperar una dimensión genuina del gobierno en la Compañía: el liderazgo apostólico del Provincial. La integración de Provincias, en cierto modo, intentaba corregir una deriva de la autoridad del Provincial que estaba produciendo desajustes en la coordinación y separación de competencias entre el Provincial y los Superiores locales.
- el mayor acento del Superior local en la *cura personalis* y *apostolica* del jesuita y de la comunidad
- la aplicación mayor del principio de subsidiaridad a través de las delegaciones del Provincial

- la potenciación del discernimiento local de la misión por medio de las delegaciones de plataformas apostólicas

Las primeras experiencias de la integración indican que la renovación no se acaba con el diseño de una nueva estructura provincial, sino que ha de afrontar una mayor planificación apostólica y su correspondiente selección de ministerios. España, como Provincia, está solo en un primer estadio.

La nueva Provincia ha dado pasos limitados en la planificación apostólica. La Provincia ha de aceptar que tiene que superar los equilibrios y pactos que posibilitaron sus primeros momentos, para ser más libre a la hora de imaginar en el Señor el futuro que se le avecina. Los procesos de planificación y selección serán costosos en una Provincia tan rica en vida apostólica, lo que supondrá un plus de dedicación del gobierno. Además de la resituación de las presencias de la Compañía, tal vez habrá acometer una reducción de la realidad de la Provincia.

Annex E: DC Process Description

COMMUNITY TIME	PERSONAL TIME
R0: Personal invitation from the Person in Charge to each of the members: "Think about it": prepare and dispose of the individual	
	PT-0: Time for personal reflection on whether to accept it
R1 Presentation: group/object/method/background information. Preambles	
	PT-1: Reading/Consideration of Reports Received (if any)
R2. Collect information echoes/conversations on thoughts from what you read. First point. Send to "Reasons in favor".	
	PT-2: Reflection/Consideration of Reasons <i>in Favor</i>.
R3: Collect Reasons in favor. Around the validity of the project. Conversation, listen. Second point. Send to "Reasons Against".	
	PT-3: Reflection/Consideration of the <i>Reasons Against</i>.
R4: Collect Reasons Against. Around the "in-validity" of the project. Conversation, listen. Third point. Send towards "Motions/Feelings". Consolation and Desolation	
	PT-4: Listening / Perception / Identification of Motions / Feelings.
R5: Sharing of motions/feelings. 1st Colloquium Send towards the overall perception/feeling of the whole group.	
	PT-5: Meditation/Consideration of the Whole. Evaluation. Decision 1 (personal)
R6: Sharing the reflection of the whole group. 2nd Colloquium Send towards perception/feeling of the Group as a whole. Decision 1 (group)	
	PT-6: Personal meditation on what has been heard. <i>Application of senses</i>.
R7: Sharing. Decision-making 1. Send to "confirmation"	
	PT-7: Personal Confirmation
R8. Sharing and confirmation (if any) of the decision 1. Drafting of the final document. Amendments/Approval. Signature, if applicable	

Source: García de Castro, J. (2017). DC process. Unpublished manuscript.

Annex F: Summary of focused themes, codes, and representative quotes (NVIVO).

Theme 1: Strategic Decisions

Codes	Representative quotes	Partici pants	Ref.
Strategic decisions		12	145
approval		9	25
(Previous) experience	<p>“... I experienced the integration processes:</p> <ul style="list-style-type: none"> - German-speaking countries - Spain - Italy + Malta (and then Romania) – as the Euro-Mediterranean province.” 	3	3
diversity	<p>“Local leadership – interaction of the Society, involving more of the local superior. "Let the company have a face." Make personal healing closer.”</p> <p>“There was a diversity of provinces, some of them very weak. The strong, however, did not see the need for integration.”</p> <p>“This is a case that could be extrapolated to... how to generate a non-fragmentation dynamic. Creation of an alliance between the maximum diversity that manages to prosper. We live in a great deal of fragmentation and this process illustrates something counter-cultural. Suggestive, pretty... even from a social point of view.”</p>	1	1
integration	<p>“The word that was used was "integration"... Fr. A. Nicolás SJ used "restructuring with spirit". This included understanding:</p> <ul style="list-style-type: none"> - The figure of the leadership of the provincial - The figure of caring for the elderly - Creation of the Apostolic Platforms” 	4	4

Codes	Representative quotes	Partici pants	Ref.
	<p>“(integration) It's possible because there's something that's above diversity, that doesn't cancel it out, but it's there. And that's why it's possible. It is about the fundamentals, which relativizes the works. That intangible is very powerful. Here's what saved us... the mission. We can see together, but we do not waste our diversity.”</p>		
<p>Fr. General & GC</p>	<p>"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, I approve the proposal presented, in the development of which it has my support..." (From the letter of Fr. General, Adolfo Nicolás SJ, to the Provincial of Spain (14th November 2008)</p> <p>"You have responded to the call I addressed to you in 2008 to consider various legal aspects and appropriate delegated bodies... The so-called Apostolic Platforms, local and territorial, signify an attempt to harmonize unity with the ecclesial, cultural, historical and linguistic peculiarity of today's Provinces, as structural modalities that must always be considered in the light of our mission and spirituality" (Fr. General, 10th September 2010)</p> <p>"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. On the other hand, the so-called Apostolic Platforms, local and territorial, signify an attempt to harmonize unity with peculiarity..." (Fr. General, 10th September 2010)</p> <p>“Importance of decision-making authority (Father General SJ).</p> <p>It links to the roadmap established by the General Congregation”</p>	<p>6</p>	<p>12</p>

Codes	Representative quotes	Partici pants	Ref.
provincial	"... We have unanimously concluded presenting to you, for your study and approval, a project to initiate a process of integration of the five Spanish Provinces into a single Province. A process that must consider, in the first place, the elaboration of a single apostolic project, which also requires, to put it into practice, a single structure of religious and apostolic government" (From the letter of the Provincial of Spain Fr. Elias Royón SJ to Fr. General (28th October 2008)	1	1
decision		12	89
charisma	<p>"Suddenly, a long-term (10 – 15 years) appears that greatly enlivens the process. There was something charismatic about that, it's the universal SJ that gives it momentum."</p> <p>"First, the decision to start the process. Model: Single province. The lookout of the process seemed impossible... And you look at it now and you say... How was this possible?"</p> <p>"What was sometimes difficult was to understand that it was a challenge for us because it was about considering where the Society needed to be in 15 years"</p>	2	2
General Congregation	"Spain preempted the GC35 decree. In 2004 the integration of Castile and Toledo took place."	2	2
Differences	<p>"In a space opposed to integration, with provinces with strong apostolic traditions, how is it possible for the creation of a single strong province to triumph?</p> <ul style="list-style-type: none"> - The Provincial leads the Provincials to the question - At the table of provincials there is debate, discernment, and finally decision." <p>"How to harmonize the rhythms and styles of each province? Some provinces had a greater identification (with the proto province) but then others had greater</p>	7	8

Codes	Representative quotes	Partici pants	Ref.
	<p>diversity (e.g. Aragon: including the Balearic Islands, and Valencia). Or more marked identity such as the Basque Country and Catalonia.”</p> <p>“Laity and formation were seen with greater urgency in those provinces where there was a smaller number of Jesuits.”</p> <p>“In the face of differences and diversity, there was a lot of dialogue and generosity.”</p> <p>”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> <p>“Risk, opposition, resistance... that the provincials must assume. This can only be done with a decision that is born of discernment, which makes "the decision mine, it is ours"</p> <p>“This is a case that could be extrapolated to... how to generate a non-fragmentation dynamic. Creation of an alliance between the maximum diversity but that happens to prosper. We live in a great deal of fragmentation and this process illustrates something counter-cultural. Suggestive, pretty... even from a social point of view.”</p> <p>“What I think helped a lot is the clarity among the provincials about the different contexts of each of the provinces, because there is no doubt that each province had its history, had its circumstances, had its social and ecclesial contexts. That was not hidden, these different difficulties were on the table, and based on these, we were able to talk about it with great clarity and transparency.”</p>		

Codes	Representative quotes	Partici pants	Ref.
	<p>“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>		
<p>Team</p>	<p>“The decision was made at the table of provincials, where the leadership of the Provincial assumes all the risk.”</p> <p>“It was a common search on the part of the provincials, in a context where not everyone knew each other yet and therefore trust was very necessary. Companionship and magnanimity were needed.”</p> <p>“(the table of provincials) had a Community Dynamics. Days in July were set aside for resting, sharing, meeting (2, 3 hours), conversations, walks, ... A lot of things were being solved. The provincial table of provincials was very decisive in the DC”</p> <p>“The provincials formed a very good team, who wanted something that was above differences and sensitivities. The Provincial knew his team very well and knew how to deal with the issues before the meetings.”</p> <p>“What was the secret of smooth operation? There was something above them: a future with fewer Jesuits, with fewer works, etc. Among the Provincials there was chemistry, that could deal with the issues.”</p> <p>“In a space opposed to integration, with provinces with strong apostolic traditions, how is it possible for the creation of a single strong province to triumph? The Provincial leads the Provincials to the question; at the table of provincials there is debate, discernment, and finally decision.”</p>	<p>2</p>	<p>4</p>

Codes	Representative quotes	Partici pants	Ref.
	<p>“Therefore, the decision rests with the leaders of the provinces of Spain. It is not democratic, but it is full of discernment when it comes to deciding.”</p> <p>“I think those were important moments, ... how to create a structure in which at the same time we continued to maintain the very Ignatian principle of helping the person, with apostolic attention that required a large, complex structure, unifying all these posed problems that we saw at the time, but that did not slow us down. And I think we saw them with great realism.”</p> <p>“(the table of provincials) was participative and constantly discerning”</p>		
Stakeholders	<p>“He was going to Rome "to favor the play.”</p> <p>“He tried to convey the decision in the visits he made to the Province and to the General Council of Rome, (which was very much in tune with the union of provinces) – which was always praised in terms of the flow of information and the acceptance of the suggestions that Rome had made. “</p> <p>“Fr. General also visited the province.”</p>	1	2
Identity	<p>“Apostolic presences were very numerous in the province of Spain. How to take care of the Ignatian qualification of these presences, how to take care of the Ignatian presence by the decrees of identity and mission of the GC35.”</p>	1	1
Ministries	<p>“Another element of difficulty was deciding where the selection of ministries was going, which always, as we Jesuits say, is a very delicate issue. Where do we want to be? We have to choose; we can't be everywhere. This is a question that arose then, but today, I imagine, it is still valid at the provincial level.”</p>	1	1

Codes	Representative quotes	Partici pants	Ref.
Mission	<p>“My consultation has told me no,” said one Provincial. Attempts were made to answer these reasons, but in others, there were no answers. We had to discern whether these difficulties could be resolved without deviating from the mission. E.g. delegate for elderly (70+ years old).”</p> <p>“These decisions are very much marked by the mission.”</p> <p>“(the decision-making process) was intended to revitalize the Society's mission in Spain, and what helped was the joint work of the provincials. And the consensus among us (the provincials).”</p> <p>“An issue that was of great difficulty at that time was to ensure that the government that emerged, would care for and balance the cura personalis and the cura apostolica, that is, the care of the person and the care of the mission.”</p> <p>“I think those mission discussions were good. They were mission debates, where ideology sometimes kicked in, and that's when we got into a fight. I think what they were looking for there was, don't they have their specificity? It's not about better, but different mission contexts.”</p> <p>“This was a process of revitalization and there were people who thought that it was a process of only organizational, juridical, and canonical restructuring. I don't think so, that would have been done in a month.”</p>	3	4
obedience	<p>“But in 2008 there was a strong conviction and the proposal to the Fr. General was very solid. In the Society, obedience is very important (which differs from other religious orders), when the General decides it, we enter into a different dynamic.”</p>	1	2

Codes	Representative quotes	Partici pants	Ref.
	“The decision is made and then carried out by the body.”		
Fr. General	<p>“The final decision is made by the general (he sanctions it). Key moment: when the newly elected general indicates that he would be in favor of integration.”</p> <p>“Fr. General, takes all the risk – he wasn't afraid of the flexibility of the structure.”</p>	1	1
Province	<p>“The only province, looking at the local level, had to have the aspect of concrete local contexts.”</p> <p>“The important decision was yes or no.”</p> <p>“Other alternatives were not considered because a climate of harmony had been created, with a lot of prospects for the future.”</p> <p>“... so that the closeness of the government is maintained, that contact with superiors (of communities) is maintained, that people are known.”</p> <p>“Restructuring of works and communities.”</p> <p>“... so that there are reflections of creativity. It should not be done in terms of withdrawal, but creatively.”</p> <p>“Don't fall into a concentration of the Society in the big places. Let the peripheries be considered as places of apostolic presence.”</p> <p>“I tried to convince the Provincials to move from coordination to integration. I did so for 4 years, until 2008. It was a confidential work of the provincials.”</p>	4	6

Codes	Representative quotes	Partici pants	Ref.
	<p>“We began to design and deal with the provincials in their consultations, but the consultation process didn't work well. Until we had to decide on what we saw: integration of provinces, the creation of a new province.”</p> <p>“Consensus was reached (2008) based on the annual meetings of the provincials.”</p> <p>“In 2008, with a small outline, he (Provincial) presented himself to Father General, who wrote a letter authorizing the start of the process. That's how the Society in Spain found out about the project.”</p> <p>“We have to make a unique Apostolic project for everyone. We already had the experience that with five provinces it could not be carried out.</p> <p>The collaboration had reached its limit.</p> <p>That required a province, that was the first scheme.”</p>		
provincial		3	4
Leadership	<p>“The decision was made at the table of provincials, where the leadership of the Provincial assumes all the risk.”</p> <p>“The Provincial is not isolated in an office, in the Curia, but is continually touring the provinces, visiting the communities, the works sites. The Provincial also brought the sentiments of the Jesuits, of the communities, of the apostolic works. In other words, they were not isolated entities. I believe that this is tremendously important, when the Provincial speaks and transmits something, he does so from an experience of having been elaborating it with the sectors and with the communities of his province.”</p>	6	10

Codes	Representative quotes	Partici pants	Ref.
	<p>“I wrote papers, and then we would confront them, so in that sense, I was very much at the center of the process because I was the one who gave the ideas. And then we'd share them. In other words, when we got to the end, it was no longer mine, but a little bit of everyone's.”</p> <p>“The Provincial took the initiative, convinced, produced documents and encouraged.”</p> <p>“On the part of the provincials, no obstacles were ever put in the way of the process. There was never a saying, “Well, I want to go my own way.” It was not the same difficulty they encountered in Catalonia and the province of Loyola as the difficulties of Castille or Andalusia, logically. But it wasn't on my initiative, out of prominence.”</p>		
Results	<p>“Then there was the concern of whether this was going to yield results. I was always convinced that we had to wait years for it to give the results, that this was not a process that once it began to be executed it was going to give results, but that it was something long-term.”</p>	1	1
Elderly	<p>“Care for the elderly: it must be comprehensive; it must include the annual account of conscience. Normally this is done by the provincial, but the SJ allows this function to be delegated.”</p> <p>“A delegation of the elderly was considered, which cost quite a lot. It was taken over by a Jesuit with a lot of charisma and it worked. It was a decision of the provincials. It was a very important decision, with a lot of DC.”</p> <p>“I participated in the decision of the delegate of the elderly, whether to have it or not. There was a fear that we could become Jesuits of double speed: those who participated in the apostolic life and others who lived it from the outside and who were even separated from the relationship with the provincial. It had canonical and</p>	2	4

Codes	Representative quotes	Partici pants	Ref.
	<p>juridical implications. The attorney general had to convey his opinion.”</p> <p>“In the field of the elderly and other fields, there was always a participation that was intended to be in the key of discernment – which required an inner freedom that was difficult to attain when the subject concerned you directly.”</p>		
Timing	<p>“He experienced it as something that had to be done, ahead of time. He had previous successful experiences, such as Castilla and León, which taught him that he had to seize the moment.”</p> <p>“In 2006, the Provincial asked the question: "What do we do with integration? Finally, the provincials admit that the process must be carried out, "we were all there." (in 2006) The issue was brought to the consultations, but "the issue did not work." Substantial support was not to be found as some significant provinces did not support it.”</p> <p>“So, I do remember the year 2003 as a delicate moment, because it was expected from the provincial congregations that there would be greater support for the issue of the integration of the provinces, and yet, at that time, when there were six provinces, only the province of Castilla and Toledo gave a yes to integration. So there was a delicate moment, that is, these two provinces are integrated or we wait for the issue to mature more”</p> <p>“So there is an interval of time between 2003 and 2008, in which things are maturing, working with that same sense of collaboration, but at the same time seeing that perhaps there came a time when the subject was ripe. It was when it was decided in 2008 and once it was decided, I never saw that there were any special moments of tension.”</p>	4	5

Codes	Representative quotes	Partici pants	Ref.
	<p>“In these processes, time is of the essence, or you are late. Not before, you never get there too early because the tendency is to delay, inertia is not to move forward.”</p>		
Community life	<p>“The 35th General Congregation gave clues about identity, community, and mission. That tripod, that is, how do we integrate all of that at this time, in our history, was a very important challenge. Because maybe we have lived very much towards the mission, and the community has not counted so much, or the identity... And yet, it is made clear in GC 35 and then in GC 36 that it also says carefully, these three issues are fundamental, otherwise we cannot be witnesses in today's world.”</p>	1	1
Motivations		8	31
apostolic	<p>“Why was this done? For greater apostolic effectiveness. 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> <p>“It was clear to the provincials that this was done for the mission, which could not be tackled in the immediate future. It was a question of carrying out an apostolic project for one province. Each one separately, it was not possible.”</p> <p>“We were aware of the importance of the apostolic purpose of the integration process.”</p>	3	3
Scenarios	<p>“Motivations, symptoms that lead to the process of unification. "Something has to be done, how do we do it." Faced with this, two temporary scenarios always appeared: short and long-term. And of scope:</p> <p>- Do all 5 come together at once?</p>	1	1

Codes	Representative quotes	Partici pants	Ref.
	<p>- Or first 2 and then 3?</p> <p>What's more, are we all in this?"</p>		
spiritual	<p>"but there was a spiritual and apostolic foundation of the process to change the (rational) scenario of motivation.</p> <p>- creative innovation (loyalty).</p> <p>- "We're not dying, we're transforming." There will be points of decay but also recreation."</p> <p>"The Awareness (and Gift) of Togetherness"</p> <p>"Confirmation noticed and felt in these years of preparation for the integration process, that, together and all..."</p> <p>"The Awareness (and Challenge) of Our "Unequal Mission Contexts" (Fr. General)</p>	2	2
rational	<p>"Of strength (growth, defensive strategy that could maintain apostolic vigor over time):</p> <p>- Evident demographic decline in most provinces (aging)</p> <p>-Inability to cope with the mission with structures that demanded a lot of human and material resources."</p> <p>- Sustainability criteria</p> <p>- Better Serve the Mission</p> <p>- Create New Styles, New Modes</p> <p>it appeared a Society that was invited to new things."</p> <p>"At that time, it must be said that we were a bit of prophets because we realized that the number (of Jesuits) was going to decrease terribly, that vocations were not going to increase. This was not a process to increase vocations. We knew what the situation was in the Church, in the vocations of society. So what we</p>	1	3

Codes	Representative quotes	Partici pants	Ref.
	<p>looked at was the future, that is, how we're going to respond."</p>		
mission	<p>"(integration) It's possible because there's something that's above and beyond diversity, that doesn't cancel it out, but it's there. And that's why it's possible. It is about the fundamentals, which relativizes the works. That intangible is very powerful. Here's what saved us... the mission. We can see together, but we do not ignore our diversity."</p> <p>"I lived it (the decision-making process) with enthusiasm and hope.</p> <p>Because it was facing a new future that the Society of Jesus had before it.</p> <p>And it was very important to me to revitalize the vision, the life and mission of the Society."</p> <p>"(the decision-making process) was intended to revitalize the Society's mission in Spain, and what helped was the joint work of the provincials. And the consensus among us (the provincials)."</p> <p>"This was a process of revitalization and there were people who thought that it was a process of only organizational, juridical, and canonical restructuring. I don't think so, that would have been done in a month."</p>	2	5
Fr. General	<p>"I am profoundly convinced that the only objective that has moved them has been the aspiration to proceed in divine service" (Const. 424, 565) and to respond to the apostolic challenge demanded of them by the Church and by changing society" (Fr. General, 10th September 2010)</p> <p>"In the letter, I wrote to you dated November 14, 2008, I exhorted the Jesuits of the five Provinces to enter into a spiritual dynamic capable of helping us to grow in a profound sense of the Companion Body and to reactivate</p>	1	1

Codes	Representative quotes	Partici pants	Ref.
	our personal and community response to the Lord's call" (Fr. General, 10th September 2010)"		
challenges	<p>"A few notes to remember:</p> <ul style="list-style-type: none"> - Difficulty of each Province in carrying out its mission - The Need to Discern a Renewed and Common Mission - The need to respond to our common demographic decline - Need to adapt and improve our provincial government" 	1	1

Theme 2: Execution

execution		12	79
evaluation		3	6
On-going	<p>"And to constantly evaluate that the organizational chart, statutes, etc. that nothing is closed, treat it as a continuous process of evaluation."</p> <p>"Continuous evaluation process, from the beginning. That means that the creation of the province is brought forward by two years. "</p>	2	2
periodical	"We always said that there had to be an annual review to correct deviations, and that was done every year, in every sector..."	1	1
implementation (infrastructure)		6	13
admin	<p>"Precisely because of the apostolic character of the process, administrative matters were left for last."</p> <p>"a former rector of the University of Deusto was appointed as administrator. It was a very complex reality,</p>	4	6

Codes	Representative quotes	Partici pants	Ref.
	<p>but it was done with great generosity. There were provinces with major economic problems and others with more solid cash positions.”</p> <p>“However, it was decided to leave the money issues for last because it was difficult and delicate that without a single authority, it would not work.”</p> <p>“I think in finances, there was a lot of generosity. And a lot of generosity also in the integration process.”</p>		
formation	“Another element that helped was to train leadership for the new context. We need leaders for this new context of the Society (and also in the world and particularly in Europe.)”	1	1
legal	“There was absolute generosity, no one looked at who contributed more or less. The difficulties came from how to create a legal system.”	1	1
Territorial platforms	“I believe that a topic that we debated a lot was respect for the different contexts of mission, 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. I am convinced that many people did not like the creation of territorial apostolic platforms.”	1	1
apostolic project	<p>“The Apostolic project was carried out by the delegates from each province.”</p> <p>“Another element that helped (the process) was participation.</p> <p>And also, the elaboration of a common Apostolic project. That defined us a lot, and not the legal structure.”</p>	3	4
implementation (phases)		11	34
alignment	“Alignment is the problem after the decision. How to improve communication, listen a lot, and pick up	1	1

Codes	Representative quotes	Partici pants	Ref.
	sensitivities in the background. General consultation with the whole province, which gives a lot of feedback.”		
apostolic interaction	<p>“The center of authority was the local superior, who was given competence in community leadership, and asked how to help the Society of Jesus in the local context.”</p> <p>“An attempt is made (with a great effort of inculturation) to heal the apostolic vitality and an excessive vectorization of the Society (e.g. universities, parishes, communities... They didn't talk to each other; they didn't even know each other).”</p>	1	2
commissions	<p>“After the approval of the creation of the new Province, two commissions were created:</p> <p>Apostolic project: one Jesuit from each Province, presided over by the Provincial. It was presented to all the Communities through the Superiors. (A layman brought by the Province of Loyola helped them design the plan.)</p> <p>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. (A lawyer helped them with legal issues.)”</p>	1	1
evaluation	“A back-and-forth process with the table of provincials and them, in turn, with their communities. The two commissions of government and apostolic projects are taking shape. The continuous evaluation process, from the beginning, so that the start of the new province is brought forward by two years.”	1	1
phases	<p>Phases of the process of "integration" or "restructuring with spirit" (Fr. Adolfo Nicolás SJ):</p> <p>2008 – 2010 Design</p> <p>2010 – 2014 Transition</p> <p>2014 – 2017 First Triennium of the New Province</p>	11	27

Codes	Representative quotes	Partici pants	Ref.
design	<p>“Design (preparation) Phase 2008-2010 – documents:</p> <ul style="list-style-type: none"> - Contemplation of the Reality to which we are sent - Apostolic Project (Mission centric) (Mission · Key Choices · Vision) - Revitalizing the Life and Mission of the Apostolic Body - Governance Structure for the Transition Phase - Governing Structure for the New Province” <p>“The solution (Design Phase) continually looks at the questions that had arisen in the Decision Phase, overcoming the resistances that had arisen. Very consensual solutions come out, which go back and forth constantly.</p> <p>For example, the figure of the Delegate for Seniors was much discussed. The same goes for the Delegate of the Territorial Platforms.</p> <p>In the process, there is a lot of internal discussion about the potential design conflict. But in 2010 it is no longer so much discussed since there has been a lot of discussion and therefore minimal room for doubt has been left.</p> <p>The solutions are part of previous questions and therefore the integration gains strength since a lot of thought was given to very reasonable questions.”</p> <p>“All the solutions that are designed are responses to those conflicts that were anticipated. For example, the apostolic platforms assume a decrease in new entries and the structure considers the mission and the set of needs to make it feasible: "they had to endure the sustainability of how the province was anticipated to be."</p>	9	15
transition	<p>“Prepare and facilitate the transition of the government of five to that of a single Province. And enabling the progressive implementation of the Apostolic Project.”</p>	6	8

Codes	Representative quotes	Partici pants	Ref.
	<p>“Transition begins with formation and vocations, followed by: Education (schools), University, Social Apostolate and Pastoral.”</p> <p>“2010-2016 transition stage. With the possibility that it would last 3 years, which ended up being the case”</p> <p>“Appointment in 2014, of Fr. F. J. Ruiz SJ as the new Provincial, replacing Fr. Elias Royón SJ.”</p> <p>“The dilemma was how to "phase" the integration:</p> <ul style="list-style-type: none"> - Each sector had to draw up its own map, its apostolic project, and the juridical structure it would need. - From there it was defined how to pass it on to the authority of the Provincial of Spain.” 		
First triennium	“The new province, in its first years, was dedicated to harmonizing rhythms and sensibilities.”	1	1
Change management	<p>“...</p> <ul style="list-style-type: none"> - How do we do it? - How to continue convincing, and motivating? - Type of communication, human contact.? - ... <p>“I didn't improvise my words, I wrote everything” because in each meeting the process was won/lost.”</p>	1	1
scale	“Once integrated, it was such a large province that it was too big for a single “socio” (i.e. Provincial’s partner). A secretary was then appointed to collaborate with the “socio” given the job scope. Their functions were divided.”	1	1
process		1	8
joint work	“(the decision-making process) was intended to revitalize the Society's mission in Spain, and what helped was the	1	3

Codes	Representative quotes	Partici pants	Ref.
	joint work of the provincials. And the consensus among us (the provincials)."		
nature	"A theme that we (the provincials) always said, "we have to recognize the positive nature of the process, this is for the good.""	1	1
Participation	Another element that helped (the process) was participation. And also, the elaboration of a common Apostolic project. That defined us a lot and not the legal structure.	1	1
communication		6	18
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."	1	1
Shared diagnostic	"Symptoms that indicated weakness. There was evidence, which indicated very clearly the way to follow. But it was not accepted." "Collaborative ties between provinces had to be launched." "The data does not start the process; the important thing is how to use it at certain times. The study of numbers must be managed wisely." "Importance of timing, they are late. It's hard to accept the evidence. Why? We were delayed, but we still had some room for maneuvering." "There was a diversity of provinces, some of them very weak. The strong ones, however, did not see the need for integration."	2	5

Codes	Representative quotes	Partici pants	Ref.
dialogue	“Where has been the difficulty or... Where did it come from? Well, let's talk. For example, one of the things I did a lot was the bilateral people-to-people dialogues.”	1	1
strategy	“The strategy was that there would be great information on an ongoing basis. That there should always be adequate information to encourage the participation of all.”	1	1
Fr. General	“Fr. General was very well informed: the meeting minutes were shared with him. In return, they (the table of provincials) received feedback from the General Curia.”	1	1
principles	<p>“Since 2008, when the integration was announced, the three keywords are Transparency, participation, and socialization.”</p> <p>“I also think that the closeness on the part of all of us, those of us who were in governments, provinces, and consultants, explaining the process to maintain that (spiritual) tone in the different communities, in the different institutions, helped. Not only by these means but also the attitudes that made it possible to move forward along these lines”</p>	1	1
reporting	“Report accurately, clearly, and with clear documents.”	1	1

Theme 3: Crosscutting

crosscutting		10	100
discernment (individual & common)		9	51
attitude	“Discernment is fundamentally an attitude: listening to others; changing my position; What we are deciding is above and beyond us.”	3	11

Codes	Representative quotes	Partici pants	Ref.
	<p>“Meetings with a DC character, even if they do not receive that name.”</p> <p>“We were searching, we didn't have a model that we could copy or adapt or make modifications to, so one aspect of the prayer was to say, well Lord, inspire us. A second aspect of that prayer was also loving the brothers, that is, accepting the opinions of others, and having the patience that God also spoke through them. And then the ability to welcome others, because God also spoke through them. And then the strength to be able to have perseverance, which is a grace from the Lord because at some point weakness enters.”</p> <p>“We were aware that we were seeking what God wanted and that was discernment (in common), but not (aware of) as to the (explicit) method.”</p> <p>“Discernment can sometimes be confused with a method. In discernment the most important thing is not the method, but rather the attitudes, first of inner silence in which there are no prejudices, there is no protagonism, I do not want to carry out my idea, therefore, I am in inner silence.</p> <p>Another attitude: what others are going to say, I'm going to take it, I'm not guarded against their ideas.</p> <p>And thirdly, what we are looking for is what God wants.”</p> <p>“It was important to listen to each other well, to discern well. And also a time to say our charisma, now (in 2008), does it have a future? Is it worth betting on it? It gave me a certain strength and joy. (the table of provincials) was participatory and constantly discerning.”</p> <p>“What challenges, what calls do we feel when facing different issues? ... put yourself in a spiritual key, not so</p>		

Codes	Representative quotes	Partici pants	Ref.
	much about theoretical discussions but what the motions are... It is more about an attitude of way of proceeding.”		
benefits	“...discernment helped us a lot... letting ourselves feel, live. What is happening, where are we going, where is (the Spirit) blowing us now?”	1	1
Key decisions	<p>“In the field of seniors and other fields, 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> <p>“We had to discern whether those difficulties could be resolved without deviating from the mission. For example, the delegate for seniors (>70 years old)”</p> <p>“Therefore, the decision falls on the leaders of the provinces of Spain. It is not democratic but loaded with a lot of discernment when deciding.”</p>	3	3
dispersion	<p>“The SJ is for dispersion, and that goes against the DC. With the superior we already have enough.”</p> <p>“...discernment was scattered. There is very intense discernment, which is key with the provincials at the beginning of the project. It was about sharing mutual perceptions.”</p>	2	2
Inner freedom	<p>“In the field of seniors and other fields, 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> <p>“But there was common prayer too. Today when we do DC, we get together and pray. At that time this was not so present. What was present is that 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>	2	2

Codes	Representative quotes	Partici pants	Ref.
	<p>“But 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. Of course, this provision is a prior condition to fundamental DC.”</p>		
method	<p>“At that time we also had some documents from the old province of Loyola that were about prayerful DC.”</p>	1	1
Moments of DC	<p>“How to detect moments of DCA: what the group does when faced with a dilemma. Blocking moment. A need for an election is detected and its justification must be sought.</p> <ul style="list-style-type: none"> • Courage: looking face to face with reality • Intuition: some foresight but without calculation that confirms it. And if it has creative elements, much less. Appeal to institutional and historical knowledge. • Faith: explains these processes in these types of organizations. There is something tremendously missional here.” <p>“Each Provincial tried to carry out a process with their consultation. Then, all the Provincials made DC.”</p> <p>“But it cannot be applied to everything (discernment) either, because in that sense (deciding) it also takes a long time.”</p>	3	3
Way of proceeding		3	49
trust	<p>“I think I lived the trust that my provincial brothers also gave me.”</p> <p>“I found trust, I found collaboration.”</p>	1	2
<i>Cura</i> (care)	<p>“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>	2	2

Codes	Representative quotes	Partici pants	Ref.
	<p>that is, the care of the person and the care of the mission.”</p>		
discernment	<p>“It was important to listen to each other well, to discern well. And also a time to say our charism, now (in 2008), does it have a future? It gave me a certain strength and joy.”</p> <p>“All this (listening, discernment, searching, charisma) allowed me to face those years with enthusiasm and hope.”</p> <p>“... Discernment helped us a lot... Let us feel, and live. What's going on, where are we going, where is (the Spirit) blowing us now?”</p>	1	3
hope	<p>“I lived it 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> <p>“I believed from the first moment that this was good and positive, but I was not blind to the difficulties that this was having and that I was also listening to the different provincials. I think that helped me personally a lot, and it helped me a lot that I didn't live this alone.”</p> <p>“I lived it (the decision-making process) with enthusiasm and hope.</p> <p>Because it was facing a new future that the Society of Jesus had before it.</p> <p>And it was very important to me to revitalize the vision, the life and mission of the Society.”</p> <p>“Delusion, hope... And opportunity, time of opportunity. Yes, also a beautiful time of opportunity.”</p>	1	1

Codes	Representative quotes	Partici pants	Ref.
innovation	<p>“I lived my call from the Lord through the Society, and a Society that was in continuous challenge, trying to adapt to new contexts, to new realities, to new circumstances, to new demographics, to new realities of globalization in which we were all involved, in the face of new apostolic and ecclesial challenges.”</p>	1	1
motions	<p>“The decision-making phase, which lasted years, was only spoken by the provincials, alone. There was more desolation there.”</p> <p>“When we, the provincials, decided, and we saw that we had to say in general that we were going to do this (the single province), and it was going to be made public, from that moment on there was more Consolation. There was concern, there was a request for light, but we were more comforted. Because we were seeing that we were ahead.”</p> <p>“The first few years, as we didn't know anything, as there were comings and goings with the consultation at times, I was talking about myself, I felt a great desolation.”</p> <p>“What challenges, what calls do we feel when facing the different issues? ... To put oneself in a spiritual key, not so much of theoretical discussions but of what are the motions. “</p>	1	3
provincial	<p>“It's not that I preached to others something that I didn't have to live myself, because also the experience of government as a provincial and my experience of the unification of two provinces, made me very aware, yes, of the positive side that this has, but also of the difficulties to which you have to have many antennas in the face of those difficulties so as not to disappoint. so as not to frustrate, to motivate people so that they don't form in front of them like a wall in which difficulties paralyze you.”</p>	1	1
realism	<p>“I think those were important moments, ... how to create a structure in which at the same time we continued to</p>	1	1

Codes	Representative quotes	Partici pants	Ref.
	<p>maintain the very Ignatian principle of helping the person, with apostolic attention that required a large, complex structure, unifying all of these posed problems that we saw at the time, but that did not slow us down. And I think we saw them with great realism.”</p>		
<p>Spiritual experience and tone</p>	<p>“How did I experience it? Well, with total dedication, not only in time, not only in work (which was supposed to be), but I lived it feeling open, feeling part of a process that was open, that was very open and that had to be followed, I lived it in great unity, with companions, with Jesuits, with lay people.”</p> <p>“I lived it with that sense of total surrender, which asked me for a lot of generosity. But this generosity was not ascetic, but willing, hopeful”</p> <p>“The union of spirits is very important, that is, here we go together, we are working despite our diversities.”</p> <p>“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> <p>“Another difficulty was how to always maintain the spiritual tone in a four-year process.”</p> <p>“I also think that the closeness on the part of all of us, those of us who were in governments, provinces, and consultations, explaining the process to maintain that (spiritual) tone in the different communities, in the different institutions, helped. Not only by these means but also the attitudes that made it possible to move forward along these lines”</p>	<p>3</p>	<p>31</p>
<p>union of spirits</p>	<p>“The union of spirits is very important, that is, here we go together, we work despite our diversities.”</p>	<p>1</p>	<p>1</p>

Codes	Representative quotes	Partici pants	Ref.
universality	“Those rich reflections that helped the General to make the best possible decision..., they gave me a very, very great experience of the universality of the society.”	1	1

Theme 4: Future challenges

Future challenges		5	15
	“I believe that my generation and the younger ones welcomed it (the integration process) with enthusiasm because we are seeing now that within the few possibilities that we have for movement, we are not simply managing misery, we are supporting the projects that the province is creating and although there may be the feeling in some people that the weight of the institutions crushes us because we are going to be very few with many institutions, I believe that, except for what is decided in the future, the institutions can always be left.”		
	“The people who are carrying the weight of the Province, I believe, are happy (with the integration). Things are being done, we have gone through and continue to go through strong crises and the province is resisting. I believe that on many occasions better than other institutions like ours.”		
	“There is a reduction in the numbers of Jesuits and communities, but on the other hand, there is almost no reduction in apostolic works. This is very notable. That is, in all the works the presence of Jesuits has been reduced, but I believe that in apostolic reduction there has been very little and instead a lot of Jesuit presence.”		
	“A curious thing that I still believe we have not internalized sufficiently, that on the one hand, we talk about a lack of vocations and at the same time we are counting on lay vocations, changes a lot of Jesuit presence.”		
	“But on the other hand, it is (the mission) apostolically fruitful because there are lay vocations and at the same		

Codes	Representative quotes	Partici pants	Ref.
	<p>time there is talk of a lack of vocations. I believe that there is a kind of double language that means that we still do not have it integrated.”</p>		
	<p>“I believe that there is a certain identity ambiguity here, but not apostolic. Apostolically there is a feeling of great Apostolic vigor and on the other hand, there is a confirmation of poverty among members of Jesuit Communities”</p>		
	<p>“And why then is there talk of a crisis of vocations and yet there are lay vocations?”</p>		
	<p>“The rational-structural aspects were accentuated, out of necessity, and what was most related to personal integration or spiritual inspiration that addresses elements of the union of spirits and heart was left for later. These last two aspects are the ones that have been most demanded in this time after 2017. It has tried to be done, but reaching the most dynamic groups in the province through provincial meetings, discernment on vocational promotion, the foundations of schools, the restructuring of the pastoral sector or the social sector.”</p>		
	<p>“A problem of great complexity arose. They wanted to integrate provinces and also do several other things at the same time. For example, they wanted to gain space in local coordination, but with the certainty that they came from communities and works that were doing their own thing and without experience in networking. There was a sense of belonging to a province (Toledo, Bética, Castilla, etc.), but no true local collaboration between works or communities.</p> <p>Another example, in addition to integration, the sectors were asked to deepen their organization, and that has been enormously diverse.”</p>		
	<p>“EDUCSI is the large sector that was already created in 2014, although its problem is that it adds previous provinces and does not seek a homogeneous structure, which will be created years later with the map of new foundations.”</p>		

Codes	Representative quotes	Partici pants	Ref.
	<p>“SOCIAL is the great beneficiary of integration since it is developing and coordinating. The biggest problem in this sector was the Entreculturas-Alboan relationship, which did not come to fruition until 2017 with an integration model that has given a lot to do due to its enormous complexity and resistance to adding key efforts in cooperation.</p> <p>PASTORAL existed, but it was not as such a sector as the previous two (EDUCSI, SOCIAL) and has later been configured in a more integrative way.</p> <p>UNIJES is the sector that results from the sum of powerful (and rich) institutions that do not want to coordinate or make a serious common plan that touches their respective strategic plans. They are happy if integration simply allows them to have identity training courses without needing to take further steps.</p> <p>It is still pending how to continue the process of collaboration in the shared mission -. It is a fact that is happening, but, at the same time, some Jesuits do not see that it has been sufficiently clarified although the majority work in collaboration. Furthermore, among lay collaborators the diversity is enormous, and work remains to be done in this sense. Mission communities or apostolic communities have been strengthened.</p> <p>Networking is something that is not clear and that is formulated very well theoretically, but in practice, it remains to be done within the province (in the platforms and sectors). It is clear that it is the future, but we will all have to change our mentality.”</p>		
	<p>“the <i>cura personalis</i>-apostolic cure or the role of the Jesuit, must continue in their deepening process. The role of the superior in cura personalis (without account of conscience) can grow much more than what is the case today. The role of the Jesuit is complicated because my vision is that it depends on the Jesuits themselves and seeing how to embody the reality that we live today of the total change in religious life.”</p>		
	<p>“The Society of Jesus, in a charismatic sense, not a legal one, is made up of Jesuits and laity. We need to continue</p>		

Codes	Representative quotes	Partici pants	Ref.
	<p>working on accompaniment (and formation) between Jesuits and laypeople.</p> <p>How to make the SJ in Spain a true apostolic and Ignatian platform. Not an NGO, that too, but that is something else. Neither is an association of schools... The heart is the Gospel of Jesus Christ.</p> <p>We must find formulas to reduce works, communities.... This is an organizational issue. You must establish priorities. It is already being done.”</p>		
	<p>“What challenges remain to be met?</p> <p>In some areas, there is still nostalgia for the old provinces and the losses that integration has entailed. Also, to the rise of identity-based and exclusionary nationalisms in these years.”</p>		
	<p>“But for the educators of the schools who have participated in training or collaboration activities, in almost all cases it has meant an injection of fresh air that has connected them with the Society of Jesus and with the common mission with enthusiasm and with less fear and the shared mission remains to be matched. Above all, some young Jesuits are concerned about the presence of so many lay people in the management of schools. They see it as a loss of identity, although some schools have gained a lot in Jesuit identity with lay directors, who have greatly improved the management of the Jesuits. Here there is a problem of understanding religious life and the value of the mission, which is more important than our small vision of where we are and how much we command.”</p>		
	<p>“It also remains to fit, in line with what was said above, that there are fewer and fewer Jesuits available for the works. But in my opinion, more serious than that is the lack of unity among us, more concerned and busier defending our ideologies than promoting the mission in line with the Company's documents. Nor does the polarization in different visions of being the Church help.”</p>		
	<p>“It also seems to me that we have the challenge of how to situate ourselves in a society that is so secularized and</p>		

Codes	Representative quotes	Partici pants	Ref.
	diverse in cultures, races... The emergencies eat us up and leave us no room for reflection.”		
	“The relationship between Sectors and Platforms is also a challenge to clarify. In the Education Sector, it gives meaning and project to work and walk together as a Sector, and that is not always easy to fit with belonging to an Apostolic platform.”		
	“We also have the challenge of our links with the Universal Company, with the documents that Fr. General invites us to have broader views and less anchored in our small concerns.”		
	“Personal relationships still need to be put in place. In the previous, smaller provinces we all knew each other, we had a common memory of spaces, people, cultures... Now we have to live with companions with whom that does not happen, and we are also all very old and less open to new relationships, so sometimes there is a more solitary life, which entails less energy in the Mission.”		

Annex G: Epistemology of scientific knowledge and sociology

1. Physics as a model

Introduction

To frame the discussion on the philosophical foundations and progression of physical science models, Figure 31 “Epistemology of Science”,

Epistemology of science

Definition:

- Epistemology (Greek:*Episteme*): Branch of philosophy dealing with knowledge using induction – moving from particular to general.

Research Design:

- Aligns with science epistemology through qualitative approach.
- Focuses on understanding and generating knowledge.
- Incorporates triangulation to enhance credibility and reliability.

Physics as a Model

- Historical evolution of scientific knowledge.

Background:

- **Aristotle:** Distinguished types of knowledge. *Poiesis* (art), *Episteme* (scientific knowledge), *Phrónesis* (practical wisdom)
- **Euclid:** Developed axiomatic deductive system.
- **Empirical Sciences:** Observation, measurement, and induction.

Criticisms and Developments:

- **Karl Popper:** Falsification.
- **Thomas Kuhn:** Paradigm shifts leading to scientific revolutions

Epistemology of Social Sciences

- Evolution and methodologies of sociological inquiry

Background:

- **Auguste Comte:** Sociology as social physics.
- **Max Weber:** Beliefs shape social structures, *Verstehen* method.
- **Alfred Schutz:** Complexity of interpreting human actions versus objects.

Sources: own elaboration based on

Aristotle, A. (1968). The complete works. Harvard University Press. Bonet, E. (2022). *Retórica y gestión. Textos para una educación liberal*. Santa & Cole. Comte, A. (1856). Social physics: From the positive philosophy of Auguste Comte. C. Blanchard. Heath, T. L. (1956). *The thirteen books of Euclid's elements*. Courier Corporation. Kuhn, T. S. (1962). The structure of scientific revolutions. The University of Chicago Press, 2, 90. Shils, E. A., & Finch, H. A. (1949). Max Weber on the methodology of the social sciences. Free Press Glencoe, IL. Schutz, A. (2012). Collected papers I. The problem of social reality. Springer Science & Business Media. Weber, M. (2001). The protestant ethic and the spirit of capitalism (1st ed.). Routledge.

Figure 31 Epistemology of science

we now delve into the historical evolution of scientific knowledge, beginning with Aristotle's contributions in the mid-4th century BC, who distinguished three types of knowledge: *Poiesis* (art and technique), *Episteme* (scientific knowledge), and *Phrónesis* (practical wisdom). *Episteme*, defined as rigorously proven knowledge, has heavily influenced Western science. Euclid's Elements later structured geometry as a deductive science based on axioms. Aristotle's non-empirical approach to physics marked an early understanding of natural phenomena. We also discuss the empirical sciences' reliance on observation and induction, while highlighting the criticisms and developments brought by Karl Popper's falsification and Thomas Kuhn's paradigm shifts.

Background

Aristotle (mid-4th century BC) highlighted the relationship between types of knowledge and its acquisition and application (action). He differentiated three distinct concepts that are essential for the study of social sciences and management:

- *Poiesis* (technique and art), such as knowledge and productive activities
- *Episteme*, like scientific knowledge and research activities, and
- *Phrónesis* (prudence or praxis), knowledge and moral character

The concept of *Episteme*, Greek for proven knowledge, has dominated the notion of what science is about in the Western tradition. Aristotle defined *Episteme* as a belief expressed in precise propositions that are true and rigorously proven. It currently has the consideration of scientific knowledge (Bonet, 2022)

Euclid's *Elements*, circa 300 BC, (Heath, 1956) organized geometry as a deductive science based on axioms, that is non-demonstrated propositions that are evident, namely eidetic truths. For example, "for any two distinct points A, B, there is one and only one straight line that joins them". The Axiomatic Deductive System, developed with valid logical reasoning (deduction), facilitates getting to theorems starting with axioms.

Aristotle, in his studies of physics on the movement of gravitation and levitation of bodies, organized earthly nature around four distinct elements: earth, water, air, and fire. And he added a fifth heavenly one called quintessence. His consideration of bodies having human intentions and observations being irrelevant to sustaining a theory put physical knowledge on the opposite side of empiricism (Crisp, 2014).

In empirical sciences, observations, measurements, and experiments are at the beginning of new theory formulation using induction, that is the rationale to jump from cases to general laws. It is the third type of knowledge, together with geometry and metaphysics. However, the criticism of the principle of induction on the number of observations needed, the coverage of circumstances relevant to the theory, and the similarity of observations triggered criticism of induction (logic) as a valid approach to proving universal laws.

Many years after K. Popper solved the problem of inductivism, that is falsification, Thomas Kuhn introduced the concept of paradigm leading to the scientific revolution. (Kuhn, 1962). He defined paradigm as a set of beliefs sustained by a scientific community which, in periods of revolution or crisis, changes its faith like a religious conversion.

2. Epistemology of social sciences

Introduction

To provide a foundation for understanding the evolution and methodologies of sociological inquiry, we examine the development of sociology as a scientific discipline, highlighting key contributions by Auguste Comte and Max Weber. Comte, in the early nineteenth century, conceived sociology as a "social physics," outlining a progression of knowledge from mythic beliefs to positive science, based on observation and experimentation, known as positivism (Comte, 1856). Max Weber, a pivotal figure in sociology, argued that beliefs shape social structures and emphasized the individual as the core research unit in social sciences. He introduced the method of *verstehen*, which involves understanding actions through direct observation and interpreting subjective motivations and gave rise to interpretative sociology (Shils & Finch, 1949). Alfred Schutz expanded on this by

distinguishing the complexities of interpreting human actions versus objects, highlighting the need to separate social sciences from natural sciences. (Schutz, 1962)

Background

Max Weber (1864-1920) is among the most influential thinkers in the consolidation of sociology as a science, previously conceived by Auguste Comte (1798-1857) in the first half of the nineteenth century as a social physics.

Comte's work focuses on how science transforms society, which he sees within the context of knowledge: the first phase, mythic, of Greek gods. The second phase is the reflection of Greek philosophers. The third phase of positive science, or modern physics, is based on observations, experimentation, and measurement (induction). Hence, the name of positivism. For Comte, sociology is a positive science (Comte, 1856).

Max Weber supported the idea that beliefs can influence the social structure and that the basic unit of research in the social sciences is always the individual because only people can execute meaningful actions. He proposed a method that he called *verstehen* (broken down into direct observational understanding - what happens when we observe an action and explanatory understanding - identify the subjective motivations and meanings of action) (Pons et al., 2003). Interpretative sociology was born (Weber, 2001).

"Common-sense and scientific interpretation of human action" (Schutz, 1962) highlighted the idea that the interpretation of objects is complex because they are based on our previous experience, during which we acquired knowledge about typified objects. Furthermore, the interpretation of human intentional action is more complex than the perception of objects – for which he introduced the concept of sub-actions, whose purposes, plans, and acts are a part of a complete action. Therefore, he points out the need to differentiate social (purpose, non-observable, interpretation) from natural (scientific interpretation) sciences.