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Discernment in management and organizations

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ABSTRACT

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? A set of authors has responded to this question and offered initial empirical evidence. This article identifies and reviews research on discernment in management and organization studies, and clarifies the nature and location of discernment within the field. It also draws together writings on discernment from outside the field, organizes their coverage according to three units of analysis – processes, practices, and meetings – and elaborates the details of discernment within each. The literature review and conceptual development offered here sets the stage for further advances in discernment research and extending discernment in management and organizations.

Delbecq et al. (2004) commended discernment to senior managers as a perspective that integrates spiritual wisdom into the analytical process required to make decisions about complex business issues. Concurrently, Falque and Duriau (2004) presented discernment as a process invoking analytical rationality and personal spirituality in managerial decision making. Likewise, Benefiel (2005b, ch. 4; 2008) affirmed discernment as a spiritual approach to individual and group decision making that includes intellectual and emotional intelligence. Other authors subsequently picked up this theme and carried it forward in management and organization research. The result is a set of articles, chapters, and books explaining and illustrating discernment in managerial and organizational settings.

This literature has yet to take on a recognized identity as a stream of management and organization research. As such, the first purpose of the present article is to identify and review discernment research within management and organization studies. Interests in the potential contribution of discernment to management practice and assessment of the research to date motivate this review of the literature. Next, this article clarifies the nature of discernment and identifies where it fits among the diverse topics associated with managing and organizations. For clarification and further elaboration of the nature of discernment, I turn to the largely-untapped body of recent work on discernment outside the field. I locate discernment as a topic proximate to managerial reflection and

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sensemaking in organizations. This study further contributes by organizing the literature on discernment in terms of three units of analysis – process, practices, and meetings (see Hildreth 1990; Kouamé and Langley 2018; Whittington 2007) – and elaborating the details of each. Overall, this study seeks to raise awareness and understanding of discernment in management and organizations and contributes to conceptual development that serves researchers and practitioners.

Management and Organization Literature

I employed the snowball method to identify literature on discernment in management and organizations. After identifying a few key references, this search proceeded by examining their cited references and subsequent work citing these key references. Starting points from which to search backward and forward included Delbecq et al. (2004), Benefiel (2008), Traüffer et al. (2010a, 2010b), and Rothausen (2017). I used both Google Scholar and Scopus to identify citing references. In addition, using the keyword "discernment," I searched all past issues of *Journal of Management, Spirituality & Religion*. Figure 1 provides an overview of identified articles, chapters, and books according to their date of publication from 2004 (the inaugural year for discernment publications in the management and organization literature) through 2019.

This review of the management and organization literature on discernment proceeds chronologically. Nevertheless, because authors' works tend to cluster in time, and any given author tends to develop related themes, a chronological presentation of the literature also turns out to be thematic. Hence, this review provides both an indication of temporal precedence and thematic development within the management and organization literature on discernment.

Chronological Review

Pioneering Work

Delbecq et al. (2004, 146) reasoned that complex managerial decisions call for "[a]n intuitive holistic perspective that integrates wisdom, human sensitivity, and value premises" with analytical techniques. They proposed integrating wisdom and spiritual traditions into managerial reasoning and practice. In particular, they considered what the Christian tradition of discernment might contribute to strategic decision making. Within this tradition, "[d]iscernment is the process of developing eyes to see God in the midst of ordinary, finite existence, to allow ourselves to be stirred by this God and called into a vocation of service in God's creative project" (Delbecq et al. 2004, 147). Importantly, these authors' framing
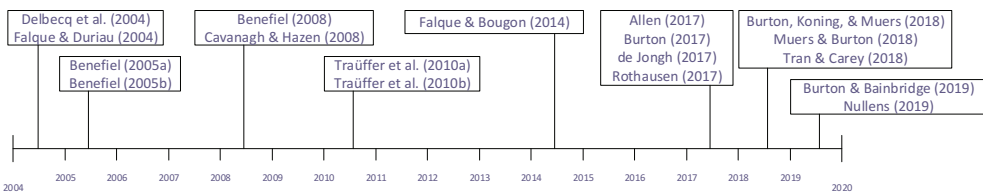

Figure 1. Timeline of Literature on Discernment in Management and Organizations.

challenges dualistic separation of secular and sacred realms; instead, they depict organizations as spiritual, as well as sociomaterial, contexts. This framing surfaces new questions and possibilities by bringing a spiritual perspective to organizational issues. According to these authors, discernment evokes creative thinking about means and ends that helps to overcome reductionist and myopic decision framing. It also affords opportunities for building consensus during decision making, which supports the ensuing coordinated response.

According to Delbecq et al. (2004), spiritual practices within the Christian tradition (particularly contemplation and prayer) foster openness to new insights and patience in resolving dilemmas. A posture of "indifference" sets aside initial inclinations for the sake of greater patience and freedom in deliberation. This posture finds practical expression in openness to learning from others, gathering and analyzing relevant data, considering multiple alternatives, and reconciling stakeholders' different concerns. Spiritual practices shape managers to be non-anxious in their unknowing and to relinquish self-serving interests and control over the eventual outcome. Once a decision is reached, it is held open until confirmed through subjective internal indicators (i.e., feelings and perceptions) and external validation from other sources. Managers practicing discernment attend to decision outcomes – beyond operational and strategic performance – that include their own spiritual formation and the quality of their interpersonal relationships.

Falque and Duriau (2004) summarized the Ignatian approach to discernment in five steps. First, define finality or the ultimate end sought. The finality for any decision is a core presupposition that encompasses one's particular identity and vision for life. Second, formulate the question in terms of binary alternatives oriented toward this finality. Questions can be formulated as choices between alternatives (option 1 or option 2) or choices to act on a single option or not. Third, deliberate on the internal and external implications of the choice. Deliberation encompasses both intrapersonal feelings and contextual evidence pertaining to the choice. Fourth, adopt the option that emerges as favored based on rational and spiritual considerations. A choice should grow out of personal conviction that builds momentum toward a particular course of action. Fifth, confirm the choice internally and externally before acting on it. Consistent with the third step (deliberation), both personal feelings and affirmations from relevant evidence and advisors contribute toward confirming a choice.

Falque and Duriau offered a case study to illustrate application of Ignatian discernment to employee appraisal. Their case illustrates, *inter alia*, "how the use of discernment can lead to increased self-awareness and the realization of important contextual factors" (Falque and Duriau 2004, 66). Furthermore, discernment surfaces the contradictions involved in managerial decisions and promotes flexibility and effective interpretation of organizational procedures. However, these authors also point out several impediments to practicing discernment in organizations, particularly the challenge of sustaining the level of managerial engagement through the steps that the process requires and avoiding turning the process into a ritualistic exercise. They called for further research examining the effectiveness of discernment in managerial decision making.

In developing the theme of spiritual leadership, Benefiel (2005a, 2005b) featured discernment. She portrays discernment as involving "all of one's faculties within the larger context of the transcendent … Through being deeply spiritually grounded, the discerner cuts through the usual distractions and attachments that obscure accurate perception, and seeks to see reality clearly" (Benefiel 2005b, 51). Drawing from

Delbecq et al. (2004), Benefiel (2005b, ch. 4; 2008) affirms five principles for practicing discernment in organizational leadership: (1) enter the decision process with a reflective disposition, (2) exercise patience in discovering the underlying nature of the decision issue, (3) undertake the hard and time-consuming work of gathering information, (4) reflect and pray, and (5) test tentative decisions by attending to their outcomes. Although leaders can practice discernment individually, collectives (i.e., groups, organizations, and communities) can do so as well (Benefiel 2005b, 2008). Individual discerners contribute to collective discernment and discerning communities support and guide individuals in their personal discernment processes. Benefiel (2008) highlighted the ongoing inner spiritual preparation of leaders that supports collective discernment in organizations. Collective discernment calls for openness and trust, attentive listening, and a shared commitment to seeking God's guidance for the situation at hand (Benefiel 2005b, ch. 8). An implication of collective discernment is shared support for the decision in which participants had a part. Furthermore, Benefiel (2005b, ch. 4; 2008) pointed out that discernment is not exclusive to Christianity; Greek philosophy, Judaism, Buddhism, and Sufism, among other traditions, espouse their own expressions of discernment.

Construct Development

For Traüffer et al. (2010b, 178), discernment brings spiritual and religious sensibilities to the acquisition and application of knowledge in decision making. Discernment is expressed in a reflective response to exercise judgment in complex situations. Overall, "discernment appears representative of a multidimensional concept of decision making by logic and reason, by empathy gained through reflection and understanding, and by moral ethics determined by one's spirituality" (Traüffer et al. 2010b, 178). These authors identify three behavior components within discernment: knowledge acquisition, self-regulation, and knowledge application. *Knowledge acquisition* refers to gathering information pertinent to understanding a situation that bears upon the decision outcome, and includes distinguishing between relevant and irrelevant information. *Self-regulation* occurs through forethought given to assessing one's motivations and the consequences of behaviors within a social setting. *Knowledge application* involves organizing information to gain understanding and acting to bring about preferred outcomes. These three components of discernment bring understandings of context and self to decision making. Running throughout these behaviors is a willingness to surface and challenge one's personal values and assumptions, thereby opening oneself and the situation to transformation.

Following their conceptual article, Traüffer et al. (2010a) developed an instrument for measuring organizational leaders' discernment practices. Starting with 50 items administered to 250 respondents, they applied principal component analysis to identify three primary factors composed of 14 total items, which they labeled "courage," "intuition," and "faith." The first factor (8 items) addressed "the leader's mental and moral courage; willingness to accept uncertainty; use of common sense; as well as ability to seek new ways to look at old things; see a future full of possibilities, believing in the equality of all people; and to be firm, but loving, in addressing issues" (Traüffer et al. 2010a, 274). The second factor (3 items) referred to "the leader's understanding of his or her emotions; willingness to make decisions based on a hunch; as well as paying attention to body cues or thoughts that may flash across the mind" (Traüffer et al. 2010a, 274). The third

factor (3 items) included "the leader's use of quiet time (to include prayer and meditation) to reflect and find meaning; use of principles of faith as guidance; as well as incorporating religious beliefs in professional undertakings" (Traüffer et al. 2010a, 274). This study supports an understanding of discernment as multidimensional, encompassing leadership traits such as courage, intuition, and faith.

Hermeneutics

de Jongh (2017) calls attention to the unavoidability of subjective interpretation in managing organizations and, hence, the relevance of hermeneutics. Discernment, for de Jongh (2017, 64), is "inevitably bound up with a normative frame of reference in the sense of one's orientation in life, values, worldview or religion." He turns to some literature on discernment within management for guidance regarding the nature of managers' hermeneutical horizon. His primary sources, Delbecq et al. (2004) and Falque and Bougon (2014), followed the Ignatian discernment tradition. This tradition affirms the subjectivity of decision making and, hence, the value of clarifying frames of reference, personal motivations, and ultimate ends. Subjectivity is evident in reliance upon a general sense of correctness associated with the direction chosen.

de Jongh (2017) summarizes six guidelines for practicing discernment in managerial contexts. First, recognize that organizational behavior is not solely determined by external factors and that organizational participants, including managers, exercise agency, and are responsible for their own conduct. Second, it is crucial that managers maintain a reflective disposition with respect to their own experiences, sustained by a community of accountability and support. Third, there must be a desire for and, more preferably, a commitment to human growth. Fourth, discernment calls for patience and "continued listening that always recognizes that the deeper questions or issues may not emerge until one is further on in the process" (de Jongh 2017, 65). Fifth, managers rely upon awareness of their internal movements and attend to the interpretation of these movements in order to assess the correctness of any choice. Finally, managers must remain attentive to their experience of events and implications following their decision to act on what they have discerned.

Ignatian Practices

Rothausen (2017) discussed discernment within the context of leader development practices. For her, leader development calls for reflection and moral centering, which she elaborates in terms of Ignatian (Jesuit) spiritual principles and practices. Within this tradition, ultimate ends are transcendent and centered on God. Rothausen relates feelings of consolation and desolation to ultimate ends, accompanying means, and motivations. Distinguishing between consolation and desolation can be subtle; insight comes more from the "aftertaste" that an option leaves rather than from an initial sense of exhilaration, which can reflect disordered desires centered on self rather than God. Rothausen (2017, 819) cautioned that consolation and desolation should not be reduced to pleasure and pain; instead, they reflect motivations toward "love-based contributions to the common good" or "fear-based self-interest." The personal practice of journaling ("keeping spiritual notes") can facilitate the personal reflection needed for discernment and leader development (see also Nullens 2019). Discernment takes place at the level of the developing leaders' personal vocation (i.e., calling or purpose) as well as

organizations' missions. Practices that cultivate personal spiritual formation equip managers to lead collective discernment in organizations.

Chapters by Cavanagh and Hazen (2008), Tran and Carey (2018), and Nullens (2019) also examine the relevance of the Ignatian perspective on discernment to organizational leadership. Cavanagh and Hazen (2008) present three diverse examples of the successful application of Ignatian discernment in organizations. They illustrate its application to the challenge of responding to global climate change and commend the method for bringing together analysis of information, emotions, imagination, and an orientation toward action. Tran and Carey (2018) review and integrate prior literature on Ignatian leadership. Discernment, with introspection and openness, is at the heart of this approach. Nullens (2019) depicts Ignatian spirituality as bridging self-awareness and morally responsible leadership. By employing spiritual consciousness, discernment goes beyond cognitive and emotional dimensions of decision making. Solitude and silence create space for reflection, getting in touch with one's deepest values, and hearing from God. Discernment calls for humility, expressed as detachment from the agenda of oneself, which brings freedom expressed in creative decision making.

Quaker Business Method

Discernment was not the primary subject for Reis Louis (1994), Allen (2017), Burton (2017), or Burton, Koning, and Muers (2018), yet all characterized the Quaker business method as an approach to collective discernment. This distinctive process calls meeting participants to attend to God as the ultimate authority for decision making. The process of collective deliberation includes spoken contributions and periods of silence. Anyone may speak during a Quaker business meeting. Concern for others and finding a way forward together should motivate speakers, rather than advocacy for partisan points of view. Norms for speaking include not speaking twice or repeating a point already raised. Intermittent periods of silence invite reflection. Allen (2017) emphasizes the recognition of "unknowing" (i.e., one's own personal ignorance) in receptivity to others' statements. Personal discernment of the Spirit's leading contributes to a collective "sense of the meeting" resulting in a decision to act. Unlike decisions based on participants' willingness to compromise, the intention behind the Quaker business method is to produce unity in affirming the direction that emerges in the course of the meeting.

Muers and Burton (2018) and Burton and Bainbridge (2019) examined the applicability of the Quaker business method to non-religious organizations. The former article assesses the method's transferability to settings where its core theological assumptions are absent. Muers and Burton (2018) argue that Quaker decision making revolves around enacting truth throughout the process, where truth is understood in terms of both the (ontologically) real and the (ethically) normative. Such an epistemological stance, which need not be theological, applies in nonreligious organizations; hence, the Quaker discernment approach holds promise for effective deployment in non-Quaker organizations. Burton and Bainbridge (2019) consider the challenges to practicing discernment posed by corporate legal compliance. They highlight the role of the clerk and conflict resolution within the Quaker business method. The clerk facilitates the group discernment process – including presenting the business at hand, sensing the emerging consensus, proposing and recording minutes that reflect that consensus, and following up on action items. Lack of consensus suggests that God's will has not been discerned and that

there is a need to take more time to reach a decision. Waiting can contribute to conflict resolution. Dissenters may choose to "stand aside" in order not to obstruct the shared sense of direction, despite personal reservations. Burton and Bainbridge (2019, 11) conclude that the Quaker business method "may offer advantages to non-Quaker and non-religious organizations in terms of a more collaborative and participative approach to making decisions"; nevertheless, "remaining compliant with the requirements of corporate law presents non-trivial challenges." Compliance calls for shareholder approval of bespoke articles of incorporation amended to include the Quaker business method.

Observations

This review of the literature on discernment in management and organizations prompts observations in several areas.

Value Orientation

Authors motivate interest in discernment on the basis that conventional approaches to managerial decision making fail to integrate the values, wisdom, and sensibilities found in spiritual and religious traditions. They do not argue against analytical or so-called "rational" approaches, but instead view discernment as complementing and enhancing such processes. There is some openness to including wisdom traditions beyond spiritualities and religions, such as those based on secular philosophies (Benefiel 2005b, 2008); however, to date, no author has pursued a non-religious tradition when developing the topic. Hence, within this literature, the primary distinguishing characteristic of discernment is the integration of spiritual and religious sensibilities and practices into managerial decision making. Studies in this line of research seek to overcome the presumed dichotomy between secular (sociomaterial) and sacred (spiritual) realms; instead, they propose a holistic approach to decision making that integrates criteria and practices from both. Spiritual and religious traditions contribute to the hermeneutic used to interpret data relevant to a managerial decision (de Jongh 2017; Traüffer et al. 2010b).

The decisions of interest for applying discernment generally relate to organizational mission and strategy, but also include functional decisions such as those regarding personnel (Falque and Duriau 2004). Decision quality depends on the values reflected in the managerial process, not just the decision outcome and ensuing performance. Furthermore, discernment includes both personal and interpersonal practices, and each level complements the other (Benefiel 2005b, 2008; Rothausen 2017). From a discernment perspective, decision making efforts are occasions for spiritual growth, as well as building and strengthening relationships; they are occasions for expressing and cultivating virtues. Discerners express ethical convictions in their practices, relationships, and decisions.

Portrayal of Discernment

Authors present a consistent portrayal of discernment and guidelines for its practice. Discernment calls for a personal posture of patience and openness that sets aside self-interest and control. Orientation for the process is found in clarifying the question, values at stake, and ultimate ends. Discerners seek information broadly and listen carefully to others' perspectives. They deliberate collectively and reflect personally. They evaluate

personal motives from within the perspective offered by their spiritual or religious tradition, and prioritize spiritual growth, freedom, and expression of faith-based values. The process is spiritual in both its formative and expressive dimensions. Decisions occur as personal conviction and collective sense of God's direction build. Intrapersonal and external confirmation should precede acting on a decision reached. The management and organization literature on discernment consistently develops and reinforces these complementary themes, and applies them normatively and descriptively.

An Ignatian perspective predominates in this literature. This reflects the seminal role of St. Ignatius' *Spiritual Exercises* (Ignatius of Loyola 1951) in Catholic and Protestant understandings of discernment, and the predominance of the Christian faith in the authors' Western cultural contexts. Framing in terms of Ignatian principles and practices affirms a particular normative understanding of the discernment process. This article's appendix provides details from St. Ignatius' seminal guidance for discernment. The other tradition evident in this literature is the Quaker business method, as applied within and beyond Quaker circles. Ignatian and Quaker traditions value discernment as ways of orienting participants' lives toward God. However, they differ in their respective emphases on personal and communal discernment. The Ignatian perspective focuses on the individual discerner, who may be accompanied and guided by an experienced person. The emphasis is on personal spiritual formation and life direction. In the Quaker tradition, the process is communal. It builds interpersonal relationships and fosters unity regarding collective direction.

Research on discernment in management has yet to venture in any significant way beyond the normative perspectives of the Ignatian (Jesuit) and Quaker traditions within Christianity. Although Benefiel (2005b, 2008) recognized that other spiritual and religious traditions affirm and practice discernment, alternative perspectives remain unexplored in the management literature. By elaborating the nature of discernment primarily from within just two traditions, the field lacks a conceptualization of discernment that applies across traditions in general. Whereas discernment must necessarily be practiced within particular traditions (i.e., there is no generic expression of discernment), nevertheless, the phenomenon should be defined and conceptualized in terms that reflect process characteristics that generalize across traditions.

Limited Research

This line of research is young, dating back to Delbecq et al. (2004) and Falque and Duriau (2004). The set of contributors and writings on discernment in management and organizations is limited but publications on this topic are coming more frequently as time passes (see Figure 1). Early work showed little referencing of prior work on discernment in the management literature. References to the discernment literature were selective and came mostly from outside management. Only recently do we see more extensive acknowledgment of prior discernment research within management and organization studies. This search revealed ten journal articles, seven book chapters, and two books (one in French) on discernment related to management and organizations.[1] Although most authors contributed just a single piece on discernment, others (Falque, Benefiel, Traüffer and coauthors, and Burton and Muers) have contributed two or more pieces, suggesting that it is possible to develop a research program on this topic.

Empirical work on discernment in the field of management consists primarily of illustrative case studies. Each case reflects a particular tradition, and only Benefiel (2005b) offers comparative case studies of organizations operating on the basis of different spiritual and religious traditions. Traüffer et al.'s (2010a) development of an instrument for measuring discernment practices stands out as the sole study using quantitative methods. Despite these authors' intention to foster quantitative empirical research on discernment, this search of the literature found no subsequent published research applying their instrument.[2] Questions could be raised about whether the items in the instrument and the factors that they compose – namely, courage, intuition, and faith – are sufficiently precise to capture validly discernment practices. Their items worded to reflect the individual leader's perspective do not encompass the management team or organizational process. Much room remains for expanding the quantitative and qualitative methods applied in empirical discernment research.

Clarifying and Locating Discernment

The preceding review of the literature on discernment in management and organizations leaves two fundamental questions unanswered. First, exactly what sort of phenomenon is discernment? This question presses for clarity regarding the definition and nature of discernment. Second, where does discernment fit into the management and organization literature? Locating discernment within the literature can clarify where it contributes to research and practice, and where other research streams may shed light on discernment. Framed in terms of these two questions, this section specifies discernment's nature and identifies connections to the broader management literature.

Discernment's Nature

The word "discernment" comes from the Latin word "discernere," which means to separate, set apart, divide, distribute, distinguish, or perceive. "Discernment means making a discriminating choice between two or more good options, seeking the best for this moment" (Liebert 2008b, 10). According to the *Oxford English Dictionary*, in contemporary usage, discernment refers to both an action and a faculty of perceiving or distinguishing. In other words, it is both a process and a skill for discriminating. Perceiving differences is critical to reaching judgments of truth, value, and how to act (Lawler and Salzman 2012).

According to what criteria do we discriminate? Framed spiritually, discernment "means skill in discriminating between those influences that enhance or lead to a fuller relationship with God or transcendent reality or, where no belief in transcendent reality is held, to fuller appropriation and implementation of one's value system" (Koenig 2014, 502). Framed psychologically, "discernment is an intentional practice which develops the ability to act in accordance with those agencies that are conducive to integration of the personality and which avoids or resists those influences that would bring about psychic fragmentation or disintegration" (Koenig 2014, 502). Overall, discernment is the process or capacity for "seeing clearly enough to make well-considered decisions which take into account and integrate the multiple dimensions of life" (Koenig 2014, 502).

Discernment is not a systematized method for decision making; instead, it is situational and allows for creative improvisation. "Because the evidence and experiences on which we act are usually conflicting and ambivalent, and because we are by nature vulnerable to our capacity for self-deception, discernment is often tentative and uncertain" (Farnham et al. 1991, 27). "Discernment, which proceeds in a series of local and bounded reflections, decisions, and evaluations, each providing the context for the next, provides one way to proceed tactically, pragmatically and tentatively" (Liebert 2008a, 339). Liebert (2008a) argues that discernment has particular relevance in the current postmodern intellectual and cultural setting. "The way forward in the postmodern world is not necessarily by grand schemes and huge institutional responses, but by small, tactical, pragmatic, incremental, dialogical and consensus-based action, which is the kind of outcome we would expect from repeated local, bounded and contextualized discernments" (Liebert 2008a, 339).

Dialogue and consensus building are critical to establishing what is true and right during this process. Truth and guidance emerge relationally, through dialogue, rather than objectively (Lawler and Salzman 2012). Justification of beliefs and actions through dialogue in a social setting, rather than according to acontextual or timeless criteria, receives support among philosophers such as Habermas (1984, 2003). The postmodern context acknowledges – and even insists upon – the inherent hermeneutical dimension, and thus subjectivity and intersubjectivity, in how people understand and find their way in the world (de Jongh 2017). Discernment proceeds based on faith and hope, not certainty.

Discernment is a fitting response to a postsecular culture (see Parmaksız 2016). Postsecular culture recognizes the unavoidability of faith in human knowing and action (Milbank 1992). Postsecularism allows for the expression of diverse faith-based perspectives (whether spiritual, religious, or secular), none of which has privileged or taken-for-granted standing in public discourse (Casanova 1994; Taylor 2007). Such a cultural setting affords the possibility of integrating spirituality and religion with secular reasoning in discourse and decision making. It allows that there is not a single normative form of rationality, but instead a plurality of possible faith-based rationalities expressed in knowing, deciding, and acting (MacIntyre 1988; Schrag 1992; van Huyssteen 1999). For a postsecular culture, discernment takes shape through dialogue between secular and sacred perspectives on decision making and seeks to integrate the two. Postsecularism also imposes the challenge of discerning between diverse spiritual and religious expressions (Hettema 2015) and engaging in discernment in inter-faith groups (Cornille 2009; Panikkar 1999).

This postmodern and postsecular framing raises questions about the epistemological basis for discernment. What criteria for knowing apply? What kind of truth does discernment produce? In what sense are the resulting decisions correct, or not? Relative to secular norms for managerial understanding and decision making, discernment carries a distinct epistemology. This epistemology, which may be more implicit than explicit in practice, unites moral and intellectual virtues in analyzing situations and making decisions (e.g., Muers and Burton 2018; Traüffer et al. 2010b). Truth is known and done in relation to an understanding of the transcendent shared within a faith community. Hence, discernment calls for an enlarged sense of reality relative to secular thinking. As such, discernment employs an expanded ontology as well as a distinctive

epistemology. It considers that more is at stake than secular reasoning and decision making acknowledge. The spiritual lives of the persons involved in the process and the quality of their relationships with one another are at least as important as the truth claims and direction discovered. The epistemic criteria in play are ethical, esthetic, and theological (Libânio 1982; Macintosh 2004) as well as scientific and pragmatic.

Related Management Literature

Where does this conception of discernment fit within the diverse subject matter of the field of management and organization studies? Three points of connection stand out. In its epistemological orientation, discernment aligns with the interpretivist perspective in management and organization research. Discernment also overlaps with two specific phenomena studied in the field: managerial reflection and sensemaking in organizations.

Interpretivism

Among management writers, de Jongh (2017) makes explicit and elaborates the interpretive nature of discernment. Interpretivism appreciates the inherent hermeneutical challenge involved in management practice and research (e.g., Allard-Poesi 2005; Cunliffe 2011; Gabriel 1991; Phillips and Brown 1993; Prasad 2002). Social situations, like texts, call for interpretation (Ricoeur 1981), yet their features underdetermine their meaning. Interpreters confer meanings to ambiguous and polyvalent situations. They do so as members of practitioner communities with distinct hermeneutical traditions (Brown and Duguid 1991; Knorr Cetina 1999). Meanings are proposed, contested, and reworked within such local and time-bound communities. Recognizing that interpretations of texts and social situations reflect local traditions has been an important feature of philosophical hermeneutics since Gadamer (2002). Perspectives and presuppositions inherited through participation in local traditions both enable and constrain meaning making (Westphal 2009, ch. 6).

Managerial Reflection

Research on reflection dates to Schön's (1983) classic book, *The Reflective Practitioner*, which highlighted reflection in managerial action. This research claims reflection in and around acting as the basis for managers' skillful performances and ongoing learning. Schön (1983) described this way of acting and learning as "reflective conversation with the situation." Subsequent research incorporated social construction of the context and, hence, "reflexivity" to acknowledge the reverberation of one's own actions in subsequent situations faced.

Managers do not simply reflect independently within a given setting; instead, they author social realities through interpersonal dialogue (Barge 2004; Cunliffe 2001; Shotter 1993). Such dialogue shapes managers' personal identities along with the nature and meaning of the situation. Cunliffe (2004) argues that the demands of their role as authors of social reality call managers to "critical reflexive questioning" of their practices and assumptions, including the ethical implications of their decisions (see also Cunliffe 2009; Hibbert and Cunliffe 2015). How managers participate as "coauthors" in dialogue, not just what they produce as a result, carries ethical connotations worthy of reflection (Cunliffe 2002; Shotter and Cunliffe 2003).

Allen (2017) makes explicit the connection between reflexive practice and discernment in the setting of the Quaker business method. For Allen, managing reflexively can be understood as a collective practice of searching for unity, as expressed in Quakers' "sense of the meeting," achieved through a social process.

Sensemaking

Research on sensemaking in organizations has its roots in Weick's (1979) seminal book, *The Social Psychology of Organizing*. There is considerable overlap between sensemaking and reflexivity in organizations, and Weick's (1995) *Sensemaking in Organizations* provides a point of convergence that is widely cited in both streams of work. Sensemaking is the interpretive and constructive process that creates meaning out of an ambiguous situation (Weick 1995; Weick, Sutcliffe, and Obstfeld 2005). Sensemaking refers to action, which may include, but also extends beyond, decision making (Sutcliffe 2018). Sensemaking seeks clarification of organizational identity, meaning, and direction in changing circumstances. Although sensemaking is ongoing in organizations, novel events, such as crises, can intensify sensemaking activities (Christianson et al. 2009; Weick, Sutcliffe, and Obstfeld 2005). Mindfulness in sensemaking, expressed as attentiveness to context and appreciation of alternative ways to respond in coordination with other actors, can improve the reliability of organizational performance (Weick and Sutcliffe 2006; Weick, Sutcliffe, and Obstfeld 1999).

In their review, Maitlis and Christianson (2014) pointed out that the sensemaking literature includes portrayals as an individual-level cognitive process as well as social and discursive. Sensegiving – in which individuals attempt to influence the sensemaking of others (Gioia and Chittipeddi 1991) – assumes sensemaking goes on at both levels of analysis. We already observed that discernment similarly includes complementary personal and social processes (e.g., Benefiel 2005b, 2008; Falque and Duriau 2004; Rothausen 2017). Maitlis and Christianson (2014) also note that, although the preponderance of the literature frames sensemaking as retrospective, sensemaking also can be prospective. Likewise, discernment draws from the past and projects into the future; hence, it is a process involving an inclusive temporal horizon (cf., Hernes & Matlis, 2010; Wiebe 2010).

What remains unique to discernment relative to portrayals of reflexivity and sensemaking in organizations is its acknowledgment of the influence – and normative role – of spirituality and religion in constructing intersubjective meaning.

Process, Practices, and Meetings

The literature on discernment from outside the field remains largely untapped in management and organization research. Writers have acknowledged little of this literature and many potential contributions to management discussions have gone unexplored. Hence, this section seeks to advance the study of discernment in the field of management and organizations by reading beyond the work already cited in order to describe discernment in organizational settings more fully than prior accounts.

Discernment never takes a generic form. It is situated and traditioned, and depends on the organizational context and question faced. As such, discernment is always distinct in its particular expression. Nevertheless, the literature on discernment seeks to identify

patterns in the process and practices that are observable and potentially transferrable across places and time. This literature is explicitly normative. The authors advocate processual features and practices consistent with their espoused faith. The Christian tradition predominates in the literature on discernment available in English; hence, it does so in this synthesis of the literature as well. Drawing from this literature, this presentation necessarily reflects the contributing authors' normative stances; nevertheless, it also describes discernment to the extent that prescription and practice inform each other.

To organize this section, I distinguish between processes and practices (see Kouamé and Langley 2018; Whittington 2007). A *process* consists of sequential activities undertaken over time, where sequencing matters to outcomes because some activities are necessary precursors for others (Mohr 1982, ch. 2; Pettigrew 1997). Identifying patterns in events over time is the key to understanding processes, and such understanding often takes the form of a narrative account (Clandinin and Connelly 2000; Langley 1999). In keeping with an interest in management and organizations, the models of the discernment process chosen for presentation here apply to groups, rather than individuals.

Practices are human activities that are organized socially based on understandings, rules, emotions, and intentions (Schatzki 2005). Practices reflect values and, as such, can be performed in ways that express virtues (MacIntyre 1984). The "practice turn" in social theory has influenced studies of religion and congregations as well as management and business organizations (e.g., Bass 2010; Kouamé and Langley 2018; Whittington 2006), thereby providing a shared analytical perspective to relate work across the two fields. Spiritual and religious practices figure prominently in discussions of discernment. Discernment practices include a variety of ways of attending to what is going on spirituality in a social setting, and growing in personal and collective capacity for such attending (Fendall, Wood, and Bishop 2007, ch. 2). The practices in themselves carry no assurance of discerning well; they merely establish a personal or group posture that is conducive to discerning (Farnham et al. 1991, ch. 4).

In addition to process and practices, the discernment literature features a third unit of analysis: meetings. *Meetings* are organized events that bring people together with a focus of attention oriented toward a purpose (e.g., Goffman 1961; Hildreth 1990). As discussed in the review above, research on the Quaker business method identifies meetings as the primary setting for group discernment. Likewise, discernment literature outside the management field often addresses how to organize and conduct meetings. Meetings vary in the extent to which their agendas encompass the sequential activities making up an overall discernment process. Also, as discussed below, discernment meetings incorporate spiritual practices suited to the occasion. Hence, the discernment meeting constitutes a distinct unit of analysis mediating between the overall discernment process and specific discernment practices.

Discernment Process

Movements in Discernment

Drawing together different strands from Christian history, Morris and Olsen (1997, ch. 4) proposes a discernment process consisting of 10 movements. Figure 2a presents these movements in sequence; however, Morris and Olsen emphasize that the order is flexible

(a) Morris and Olsen (1997)

| Framing | ➡ | Grounding | ➡ | Shedding | ➡ | Rooting | ➡ | Listening | ➡ | Exploring | ➡ | Improving | ➡ | Weighing | ➡ | Closing | ➡ | Resting |

(b) Barton (2012)

| Clarify the question | ➡ | Gather the group | ➡ | Affirm guiding values and principles | ➡ | Pray and test for indifference | ➡ | Set the agenda | ➡ | Listen together | ➡ | Silence | ➡ | Select and weigh options | ➡ | Agree together | ➡ | Seek confirmation |

(c) Liebert (2015)

| Focus for discernment | ➡ | Current situation | ➡ | Social analysis | ➡ | Theological reflection | ➡ | Decision | ➡ | Confirmation | ➡ | Implementation | ➡ | Evaluation |

Figure 2. Discernment Processes.

and steps may be reordered or skipped. As a group advances, they may decide to revisit an earlier step in light of the acquired learning that informs that step. Furthermore, particular movements may be accomplished through delegation to individuals and subgroups, rather than be taken up by the group as whole (Morris and Olsen 1997, ch. 5).

Framing begins the process by identifying the focus for discernment. *Grounding* establishes a guiding principle relevant to the issue, as informed by the values, beliefs, and mission of the discerning group. *Shedding* identifies and lays aside selfish and false beliefs, as well as preconceived conclusions, to establish a posture of openness to learning and possible outcomes. *Rooting* relates the situation for discernment to pertinent aspects of the group's faith tradition. *Listening* enables hearing from those within the discernment group and other stakeholders, and attentiveness to God's guidance. Prayer and silence, and attending to one's own feelings are aspects of listening. *Exploring* imagines possible options and paths forward. *Improving* attempts to enhance the proposed options beyond their initial conception. *Weighing* sorts and tests the options. A discernment group can draw from a variety of possible evaluative criteria consistent with its tradition. *Closing* moves the deliberation to selecting an option. If consensus has emerged, then the decision should be straightforward. If non-consensus remains, then the group considers whether to return to earlier steps in the process, find an alternative way to decide, or drop the matter entirely. *Resting* tests the decision by pausing before acting on a decision and attending to subsequent feelings of consolation and desolation.

Preparation and Process

Barton (2012) emphasizes preparation of individual leaders and the leadership group prior to engaging in discernment. This emphasis expresses her contention that "the preparation is actually more important than the process" (Barton 2012, 13–14). Barton stresses the cultivation of discernment practices, as discussed below, for personal spiritual transformation to enable personal and collective discernment.

Figure 2b summarizes the movements within Barton's (2012) depiction. The process begins with *clarifying the question* for discernment. Not all questions warrant a full

discernment process. A presenting issue should be probed to determine the underlying question and its significance for the organization. Once the question for discernment has been clarified and qualified, it is time to *gather the group* by identifying those who should be involved. This group includes those who have responsibility for decision making and action in response to the question and a facilitator of the discernment process, and may include other stakeholders or experts who can make unique contributions to the group's deliberations. Next, *affirm guiding values and principles* that orient the process and create safety for dialogue. *Praying and testing for indifference* intend freedom from disordered attachments and openness to alternatives. Not all participants may reach indifference, but willingness to be open with oneself and the group establishes collective readiness to move forward with the discernment process. Prayers for wisdom and quiet trust acknowledge leaders' needs in facing the discernment question and affirm reliance upon divine provision. *Setting the agenda* establishes direction for the process and assures that needed voices and information will come before the group. *Listening together* includes attending to each other, to pertinent information, and to personal and group dynamics. *Silence* complements listening by allowing time for personal reflection. Silence introduces patience into the discernment process for the sake of thoroughness and gaining clarity. When the group reconvenes, time is given for further listening. *Selecting and weighing options* identifies one or more options and seeks to improve upon them. Beyond simply evaluating the advantages and disadvantages of each option, the goal is to discern God's leading. As consensus emerges, the group *agrees together* about the direction to pursue. The final step before acting on the decision is to *seek confirmation*, reflected in a sense of peace about the process and outcome.

Social Discernment Cycle

Liebert (2015) presents a "social discernment cycle" consisting of the sequential movements shown in Figure 2c. This model has in view a social system as the focus for discernment and eventual action. Its antecedents include Catholic teaching on social justice and liberation theology. As the term "cycle" indicates, this process is meant to be repeated over time.

The process begins by choosing or clarifying the aspect of the social system that will be the *focus for discernment*. This initial step leads to describing the *current situation*, along with noting personal responses to it and feelings about it. Sharing observations and experiences within the group enriches the understandings that individuals bring and locates the group in relationship to the social system that is its focus for discernment. *Social analysis* delves into the empirical details of the social system – such as its history, mission, culture, relationships, and participants' assumptions – to develop a fuller picture. Here the group collects data and can apply analytical methods from history and the social sciences, as well as management and organization studies. *Theological reflection* explores how resources from a religious or spiritual tradition address the social setting. Theological reflection is a dialogue between the descriptive empirical evidence and wisdom from the group's tradition for the sake of gaining a faith-informed perspective on the situation. As the group moves toward a *decision*, Liebert (2015, ch. 7) advocates choosing a single feasible point of engagement that starts to move – even if only subtly – the complex social system. Tentative decisions require *confirmation* through anticipating the results of a decision, and associated emotions, that commend it. Liebert (2015, 131–132) advises,

"Look for whatever enhances life, spiritual freedom, and well-being, and be suspicious of whatever depletes life, spiritual freedom, and well-being not only for discerners, but within the system as a whole." Initiating the chosen first action moves the process to *implementation* within the social system. *Evaluation* may occur in parallel with implementation or follow as a means to learn and adjust, and prepare for the next cycle of discernment.

Commonalities

The discernment processes described by Morris and Olsen (1997), Barton (2012), and Liebert (2015) share key features in common. These authors advocate flexibility and contextualization and, as such, their portrayals can be seen as variants within a general schema for the discernment process. Shared movements across the models include issue framing, indifference, analysis, listening and silence, identifying and improving options, evaluating options, moving toward agreement, and waiting for confirmation before implementing a decision. The following norms characterize the various movements within collective discernment processes:

(1) Issue framing includes clarifying the focal question as well as the group's guiding assumptions and values.
(2) Indifference should be addressed early in the process. Seeking and testing for indifference may be a recurring need within the discernment group.
(3) In advocating social analysis, Liebert (2015) acknowledges explicitly the need for applied research to gather information relevant to an issue for discernment. Other authors subsume analysis under "listening."
(4) Listening and silence complement each other and can be done iteratively. Waiting is an active part of the discernment process; it affords time for reflection, listening, and clarification of understanding regarding the situation and one's own emotions and motivations.
(5) Developing options is a constructive process: option improvement follows initial option proposal. Collective evaluation of options should move the group toward agreement about the direction to pursue.
(6) An emerging consensus should be held tentatively, and confirmation sought before acting.
(7) Evaluation, learning, and discerning continue during decision implementation.

These sequential movements – along with the priorities that they reflect – compose the overall discernment process espoused in contemporary Christian writings.

Discernment Practices

Writers commend a variety of traditional spiritual practices for discernment. Prominent among these are solitude and silence, prayer, scripture reading, worship, listening, and reflecting, each of which this section presents briefly. Although identifiable as unique, these discernment practices complement one another and often blend together in use. Writers emphasize that these practices are not merely ways of doing discernment; they are, more essentially, ways of living and growing spiritually. Individuals can do these practices, but not without connection to others. Immersion in a spiritual or religious

community and its history orient and give meaning to these practices, and individuals gather to learn and engage in these practices together.

Solitude and Silence

Solitude involves scheduling uninterrupted time in isolation and silence that provides freedom from speaking as well as listening (Calhoun 2015, 128). Solitude and silence grant reprieve from the company of others and the many demands upon personal attention, and free people to attend to God and their spiritual lives (Barton 2006, ch. 2; 2012, ch. 2). Solitude and silence facilitate the other contemplative practices (prayer, meditation, worship, etc.). Solitude and silence also afford time for rest, refreshment, recreation, and creativity, which can bring new insight and energy for discernment. The two most influential discernment traditions within Christianity – Ignatian and Quaker – affirm solitude and silence as means to gain a fresh perspective on the issue that a decision maker faces. Movement between discussion with others and interludes of solitude and silence characterize discernment processes and meetings.

Prayer

Dougherty (2009, 61) writes, "Whatever the route to a decision, the path must always be prayer. The methods we choose can never be a substitute for prayer. ... We must live receptively in all of life. Our receptivity will take different forms at different times in life, just as the form and content of the prayer of discernment may vary." Prayer expresses the essential posture of the discerning individual or group, which is one of humility and trust in divine provision (Dougherty 1995, ch. 3).

Expressions of prayer are diverse and creative. "Prayer encompasses all the ways we communicate and commune with God" (Barton 2012, 42). Liebert (2015) stresses recurrent prayer for "spiritual freedom," resulting from a disposition called "indifference" in the Ignatian tradition, throughout the discernment process. Barton (2012, ch. 2) highlights three particular expressions of prayer pertinent to discernment: (1) prayer of quiet trust, which confesses dependence on God, (2) prayer for indifference, and (3) prayer for wisdom, which seeks God's guidance.

Scripture Reading

The teachings of scripture provide guidance from history that can be brought to bear upon an issue for discernment. Scripture offers stories and images that stimulate the imagination. Scripture may prompt a surprising option that would not otherwise be considered; it may establish a focal point for engaging a complex issue. The purpose of reading scripture is not to support a preferred argument but instead to provide a way to listen for divine wisdom regarding the matter at hand (Farnham, Hull, and McLean 1996, 47; Fendall, Wood, and Bishop 2007, 30–31). Scripture serves discerners as a check on their assumptions, direction, and motives. The key to spiritual formation through the reading of scripture is openness to what God is speaking to the discerner(s) in their particular time and place (Barton 2012, ch. 2).

Worship

Worship includes diverse ways of acknowledging and honoring God as practiced across religious and spiritual traditions. For Quakers, the business meeting is part of

gathering for worship, thus worship and business are interwoven. Through worship, the meeting focuses on God; participants are given an opportunity to disengage from the pressures of their lives and settle into God's presence (Farnham, Hull, and McLean 1996, 58). Worship exalts the one who is of supreme value, thereby giving the discerning group a theological orientation for facing the issue at hand. Worship functions as a formative spiritual experience by shaping the affections that its practitioners live (Smith 2016). From such affections arises the possibility that virtuous practices and ethical decisions are more than a mere covering for a primary orientation toward oneself.

Listening

Active listening is the skill of hearing and processing the ideas and feelings conveyed by others in their words. It includes seeking clarification by asking questions, paraphrasing for assurance of understanding, and pausing to absorb what has been said. An active listener may identify and name the feelings expressed by a speaker. Listening expresses deference to others who may be quite different from the listener, and openness to learning from them. Moreover, listening in the context of spiritual discernment includes awareness of what is occurring spiritually. This means, among other things, attending to the various ways that God may be communicating – through circumstances, emotions, other people, and so forth (Fendall, Wood, and Bishop 2007, chs. 2–3). A holistic approach to learning and knowing encourages you as a discerner to "[l]isten to others with your entire self (senses, feelings, intuition, imagination, and rational faculties)" (Farnham, Hull, and McLean 1996, 57).

Reflecting

Reflection does not stand alone; it runs through solitude, silence, and prayer, among other spiritual practices. Nevertheless, it also can be a focal practice, particularly when cultivated as a regular discipline for reviewing what is going on in one's own life and relationships. Historically, this was known as the *examen* (or *examination of conscious*). A daily habit of personal examination encourages staying up-to-date through regular reflection. Dougherty (2009, 25) explains, "In this practice, we want to be aware of the unique ways God has been present for us during the past twenty-four hours, the unique invitations to love that have been present during that time and how we have missed, responded to, or resisted those invitations."

The examen and discernment are closely related in their reliance upon and fostering of careful discrimination in choices about how to live (Liebert 2008b, 4–6). Reflection gives perspective to what is going on in our exterior and interior lives; it reveals sources of consolation and desolation, thereby contributing to discernment. Furthermore, as cultivated in the Ignatian tradition, reflection contributes to self-awareness and builds personal capacity for leading organizations (Nullens 2019; Rothausen 2017; Tran and Carey 2018). Barton (2012, 45) notes, "A leader cannot be discerning about external matters if they are not able to discern what is true and false within themselves" (Barton 2012, 45). She cautions, "If we are not growing in self-awareness through honest self-knowledge and self-examination, there is every possibility that our leadership may in the end do harm where we had hoped to do good" (Barton 2012, 44).

Discernment Meetings

The Quaker tradition offers a well-established protocol for structuring discernment meetings (Fendall, Wood, and Bishop 2007). These meetings begin by affirming the intention to follow God's direction. Participants should be willing to set aside preconceived ideas and convictions, and open themselves to how God may lead the group during the meeting. The facilitator presents relevant information to the group and clarifies the issue for discernment. The group waits in silence and seeks to perceive how God is leading. The participants then share their perceptions, allowing sufficient time for all who have something to offer to do so. Next, the discussion shifts to how their observations fit together and what understanding (or "sense of the meeting") is emerging. When the group reaches a common sense of agreement, the meeting facilitator (re)states this understanding. At this point, the facilitator may ask those who hold objections if they are willing to stand aside and let the decision go forward. The decision is written into a provisional minute that is read to the group to check its accuracy. The participants then reconsider and, if ready, affirm the decision as God's wisdom for the group.

Farnham et al. (1996, ch. 8) advise setting a simple agenda for discernment meetings. The agenda should provide a clear focus and adequate time to work through the discernment steps. Discernment at the highest level of governance should address issues that are strategic for the organization; less weighty matters can be delegated and handled in other settings. Boards and management teams engaging in discernment need to schedule meetings that are long enough to allow sufficient time for incorporating spiritual practices, listening to one another, and deliberating together. The scope of the meeting can be kept reasonable if it is situated within a broader discernment process, which includes pre- and post-meeting communication and work.

Fendall et al. (2007, 58–60) offer four guidelines for speaking during a discernment meeting: recognition, respect, brevity, and clarity. Rather than simply speaking up when someone else finishes, or worse yet, interrupting someone while they speak, participants should ask to be recognized. They should speak respectfully, and avoid comments that demean others' work or personhood. This perspective turns deliberation (or debate) into open dialogue, where personal vulnerability and interpersonal trust facilitate learning (see Palmer 2004). Avoiding repetition and irrelevant additions keeps comments brief, and moves the meeting along efficiently. A certain amount of "processing out loud" can help to build understanding during the discernment meeting, but speakers should seek to avoid muddled speech and, instead, express themselves as clearly as possible.

Upholding norms for an effectively discernment meeting (e.g., Farnham et al. 1991, Appendix 1) is the general responsibility that the facilitator assumes. The meeting facilitator should value an inclusive process and bring a skill (or gift) for understanding what is going on spiritually during the discernment process (Fendall, Wood, and Bishop 2007). This facilitator also brings a commitment to work through conflict and find common ground among participants. The facilitator takes responsibility for organizing the meeting and the information that will come before the group. The facilitator guides the meeting through each of its sequential phases and, when needed, provides clarification and instruction to the participants. When the group is confused or in conflict, the facilitator calls the group into listening silence – for whatever duration that the group needs. As noted earlier, within the Quaker tradition, the discernment meeting facilitator

is known as the "clerk" (see Burton and Bainbridge 2019). Morris and Olsen (1997, 70–72) coined the term "discernmentarian" for this role.

Consensus as a criterion for group discernment deserves clarification. Consensus is an alternative to voting, but it does not require unanimity. Farnham, Hull, and McLean (1996, 89) explain, "Jesuits sometimes use the terms *consensus* and *unity* interchangeably; Quakers do so less easily. Most people who practice consensus, including secular groups such as the League of Women Voters, which has used consensus for many years, generally steer away from the term *unanimous*." Consensus affirms a prevailing shared perception among group members about the way forward. Consensus suggests that the group has given sufficient attention to lingering concerns, and that participants holding such concerns are willing to stand aside and not allow their concerns to obstruct movement toward resolution of the matter at hand. Consensus also may require deferring a decision to allow time for further reflection and to address concerns. "Consensus often unfolds over time and may not fit into a predesigned schedule" (Farnham, Hull, and McLean 1996, 32).

Discussion

Values Expressed in Discernment

In societal and organizational cultures that promote competition, productivity, self-sufficiency, and individualism, discernment offers a contrasting approach to decision making – one that emphasizes cooperation, dependence, collectivism, and ethical behavior (Farnham et al. 1991, ch. 4). Those engaged in discernment seek freedom from their own captivity to personal desires and a surrounding culture that limit their freedom to act consistently with that which is transcendent and which they ultimately value. Above all, it calls for centering on God, rather than oneself. Discerning leaders acknowledge love, trust, humility, and patience as virtues to which they aspire in their work together with others. A willingness to acknowledge ambiguity and engage in ongoing listening and learning, and not to press for hasty closure or certainty, characterizes discernment. In this way, discernment expresses appreciation for patiently "living the question" (Farnham et al. 1991, 87).

Discernment acknowledges the social, material, and spiritual aspects of decision making. It involves a holistic perspective on decision making that requires paying close attention to both the external world and the inner world of emotions and desires (Au and Au 2006). "[D]iscernment goes beyond the analytical to engage our senses, feelings, imaginations, and intuition as we wrestle with issues" (Farnham, Hull, and McLean 1996, 6–7). It fosters awareness of what is at stake spiritually – personally and collectively – in the decision making process, as well as the resulting actions and outcomes. While discerning, participants have occasions for clarifying and expressing deeply-held values, experiencing spiritual growth, and supporting one another – in short, they practice their spirituality. Fendall, Wood, and Bishop (2007, 118) emphasize, "For those of us whose polity is based on group discernment, the invitation is always to go beyond the forms and procedures to the life and power that undergird them."

Within the Christian tradition, writers often frame their presentations of discernment in terms of the intention to know and do God's will – personally and together with others

(e.g., Barton 2012; Lawler and Salzman 2012; Morris and Olsen 1997). This intention is pursued in part by articulating principles from a spiritual tradition that guide inquiry into the question for discernment and the response that emerges. Beyond explicit principles, spiritual traditions shape the epistemology, ontology, and ethics of discernment implicit in practice. Discernment is a distinct way of knowing within a spiritual or religious community and tradition (Macintosh 2004). Its theologically-informed ontology extends beyond the social and material to the "discernment of spirits" (Chang 1998, ch. 11; Ignatius of Loyola 1951; Wink 1992). Its ethic lies in expressing theology practically in social settings. A holistic understanding of people as embodied, spiritual, and social beings in relationship with God motivates the rationality expressed in discernment.

Discernment holds potential positive implications for organizations. Familiarity with discernment raises awareness of how managers can obstruct effective and ethical processes by letting their personal interests dominate decision making. Managers' posture of indifference (spiritual freedom) opens exploration of alternatives and consideration of diverse stakeholders' interests. Building consensus through discernment can facilitate coordination and heighten commitment during the ensuing organizational action (Delbecq et al. 2004). Nevertheless, managers and researchers should consider not only performance in terms of conventional criteria for organizational efficiency and effectiveness; they should incorporate the values affirmed within discernment traditions. Such criteria include participants' self-awareness, spiritual growth, expression of virtues, and the quality of interpersonal relationships. Discerners value decision making and collective action as spiritual experiences, not merely as means toward personal, social, or material ends. The purposes internal to discernment reflect spiritual and religious beliefs and values that should not be overshadowed by secular performance criteria. Evaluations of discernment's effects on managerial decision-making processes and outcomes should include criteria both internal and external to the expressed tradition.

Extending Discernment in Practice

In many of its movements, discernment processes are similar to portrayals of managerial decision making found elsewhere – including framing the question, gathering and analyzing relevant data, and identifying courses of action and assessing their implications. Fry (2020) points out that guidelines for managerial decision making align with discernment in advocating inclusion of stakeholders, openness, safety, and mutual listening in deliberations, aspiring to creative outcomes, time for reflection, combining intuition and emotion with analytical work, and a period of incubation for reflection. When discerning, guidance for decision making found in the management literature remains relevant, yet incomplete. By bringing practical wisdom from spiritual and religious traditions, discernment augments and enhances, rather than replaces, secular approaches to decision making.

Diverse spiritual and religious convictions among organizational members involved in a decision present challenges to designing a discernment process and affirming its associated beliefs and practices. The diverse faith traditions to which organizational members adhere contrasts with the assumption of a common tradition implicit in much of the literature on discernment. Members in organizations embedded in cultural

settings with a single dominant religion should be able to come to shared appreciation for discernment as practiced within their tradition. Religious or faith-based organizations – where values, norms, and mission are understood in spiritual terms – are better prepared to engage in discernment than organizations where such framing of managerial issues is missing. Organizations characterized by spiritual and religious diversity face the challenge of designing inclusive processes and practices. Organizations may lack capacity for interfaith dialogue and the willingness to contribute resources to cultivating it. Where the organizational culture precludes collective discernment, individuals remain free to practice discernment personally.

Gaining a better understanding of the challenges and adaptations required for practicing discernment in non-religious organizations, such as business firms, should motivate future learning. By assessing the applicability of the Quaker business method to corporations, Muers and Burton (2018) and Burton and Bainbridge (2019) provided precedents for examining this issue. Falque and Duriau (2004) recognized both potential benefits and impediments to adopting discernment in business settings. In particular, they flagged the high level of managerial engagement required as an obstacle to sustaining discernment. Constraints on managerial attention (e.g., Ocasio 1997) need to be faced squarely when designing discernment processes and meetings. Beyond figuring out how to incorporate discernment initially, managers need to understand what makes discernment sustainable in organizations.

Organizations pursue efficiency and effectiveness in decision making by delegating decisions to specialists, whether teams or individuals. This principle applies when implementing discernment. Choosing the participants in the process is an important step in discernment (see Barton 2012). Matters of mission and strategy typically involve the upper echelon of the organization and, because of the high stakes involved, merit considerable investment of time and organizational resources. As such, management may deem a collective discernment process worthwhile. Guidance regarding the design of such a process allows for flexibility to fit the organizational setting. Management teams may do well to move into discernment incrementally rather than attempting radical changes from past decision-making norms. This can be done by introducing a particular new practice, organizing a meeting with a discernment-oriented agenda, or incorporating a discernment step into an already-familiar decision process. Decision making by functional or cross-functional teams can incorporate selective elements of discernment, as illustrated by Falque and Duriau (2004) for personnel decisions.

Advancing Research

Research on discernment in organizations is still at an early stage, and there are ample opportunities for qualitative and quantitative studies. Most of the presentations of discernment from outside management and organization studies are normative, rather than descriptive. As such, researchers can make unique and valuable contributions by studying empirically how discernment takes place within organizations. Furthermore, they can bring a perspective that balances appreciation and critique when assessing discernment. On the qualitative side, in-depth, comparative case studies could uncover the facilitators and contingencies relevant to implementing and sustaining discernment. These include the leadership characteristics and practices required, organizational

processes and culture, and the nature of the issues addressed. Qualitative research could adopt longitudinal designs that track discernment processes over time. Action research (e.g., Greenwood and Levin 2007) offers a method for engaging and learning with management teams and organizations transitioning toward discernment. Following Traüffer et al. (2010a), quantitative studies could pursue the development of discernment scales for use in large-sample studies. Indicators of discernment should cover the three units of analysis elaborated earlier – processes, practices, and meetings.

This study identified two interrelated streams where discernment fits within the management and organization literature: managerial reflection and sensemaking in organizations. Researchers could study how managerial reflection and sensemaking inform the theory and practice of discernment, and vice versa. Discernment is unique in bringing spirituality and religion into the interpretive process. In discernment, the dialogue between interpreter and situation includes a third dimension – the interpreter's faith tradition (including the literature and community that express that faith). The interpretive process is one of theological reflection or "reflective believing" that seeks to put faith into practice in a particular situation (see Foley 2015; Liebert 2015, ch. 6; Miller 2015). The discerner seeks to understand and act upon that which is spiritual in nature and significance. Such considerations remain unacknowledged in the literature on managerial reflection and sensemaking, yet they align with interest in ethical decision making expressed in this research (e.g., Cunliffe 2004, 2009; Hibbert and Cunliffe 2015).

Descriptions of discernment processes (such as those summarized in Figure 2) separate reflection and action, with the former preceding the latter. In contrast, writings on managerial reflection and sensemaking envision other possibilities – such as concurrent action and reflection (Schön's (1983) "reflection in action"), and action followed by reflection (Weick's (1995) "retrospective sensemaking"). Acknowledgment of alternative temporal arrangements between deliberation and action may stimulate new, and possibly less rigid, conceptions of discernment. Furthermore, researchers could examine discernment from the constructivist perspective found within the literature on managerial reflexivity and sensemaking. Such a perspective would ask how the dialogue associated with practicing discernment in organizations transforms the sociomaterial context in ways – intended and not – beyond the actions envisioned in explicit decisions emerging from discernment processes. As a repeated managerial process, the implications of discernment carry forward in the constructed sociomaterial settings in which subsequent experiences with discernment unfold.

Although authors such as Benefiel (2005b, ch. 4; 2008) and Dougherty (1995, 24–25) acknowledge discernment in traditions as diverse as Sioux Native American, Hindu, Buddhist, Jewish, Sufi, and yogic, the English-language literature provides little coverage of discernment processes and practices outside Christianity. One exception is the volume edited by Cornille (2009), which addresses discernment in interreligious dialogue and includes Jewish, Muslim, Hindu, and Buddhist perspectives, along with Christian. The question of how discernment takes place in encounters between persons of distinct religions is a worthwhile line of inquiry; it could provide insights into how to approach discernment in religiously pluralist management teams and organizations. Nevertheless, an articulation of discernment within each tradition is a needed antecedent. Elaboration of a tradition should delve into its particular processes and practices, as well as principles for discernment. Studies within spiritual and religious traditions can contribute to

building a literature that sets up comparative and integrative research. By offering examples of how Buddhism could support Ignatian discernment, Dougherty (2009) begins to suggest the possibility of finding points of complementarity in discernment practices across spiritual and religious traditions. Such work requires elaboration in greater depth, and interfaith research teams could take up this dialogue (see Miller 2017).

Notes

1. The timeline in Figure 1 includes all but one of these 19 references, Reis Louis (1994), which predates publications (beginning in 2004) with a primary focus on discernment in management and organizations.
2. I examined citing references listed in Scopus and Google Scholar on 15 February 2019.
3. The coverage of "making a choice of a way of life" in the second-week section of *Spiritual Exercises* (71–77) contains further practical guidance for discernment in decision making.

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Appendix: Background on Ignatian Discernment

The influence of St. Ignatius' *Spiritual Exercises*, written in the 16th century, pervades discernment practice and literature in the Western Christian tradition. This influence extends to writings on discernment in management and organizations, as documented in this review. Despite its influence, Ignatian beliefs and practices may be unfamiliar to many of those working at the intersection of management, spirituality, and religion. For this reason, this appendix summarizes guidance from Ignatius pertaining to discernment. All quotes (and page numbers in parentheses) come from L. J. Puhl's English translation of *Spiritual Exercises* (Ignatius of Loyola, 1951) from the original text in Spanish. St. Ignatius organized his guidelines according to 4 weeks of spiritual exercises, with different instructions for each week. His opening section addresses presuppositions and his closing section offers rules for discerning spirits. This summary draws from those two sections.[3]

The opening paragraph introduces spiritual exercises and their purpose:

By the term 'Spiritual Exercises' is meant every method of examination of conscience, of meditation, of contemplation, of vocal and mental prayer, and of other spiritual activities that will be mentioned later. For just as taking a walk, journeying on foot, and running are bodily exercises, so we call Spiritual Exercises every way of preparing and disposing the soul to rid itself of all inordinate attachments, and, after their removal, of seeking and finding the will of God in the disposition of our life for the salvation of our soul (1).

Exercises emphasized by St. Ignatius – such as reflection and prayer, and a posture of indifference to all but doing God's will – remain prominent in discernment practice to this day. Shortly after this quotation comes a statement that reflects the intended integration of intellect, will, and emotions in discernment: "In the Spiritual Exercises which follow, we make use of the acts of the intellect in reasoning, and of the acts of the will in manifesting our love" (2).

The core theological premises affirmed in the spiritual exercises are:

Man is created to praise, reverence, and serve God our Lord, and by this means to save his soul.

The other things on the face of the earth are created for man to help him in attaining the end for which he is created.

Hence, man is to make use of them in as far as they help him in the attainment of his end, and he must rid himself of them in as far as they prove a hindrance to him.

Therefore, we must make ourselves indifferent to all created things, as far as we are allowed free choice and are not under any prohibition. Consequently, as far as we are concerned, we should not prefer health to sickness, riches to poverty, honor to dishonor, a long life to a short life. The same holds for all other things.

Our one desire and choice should be what is more conducive to the end for which we are created (12).

These premises are not just theological, they are theocentric. The spiritual exercises were meant to shape people to be oriented exclusively toward honoring God, and free from hindrances to this commitment. By implication, the commended ethic for decision making gives no weight to the discerner's welfare.

For St. Ignatius, distinctions made in discernment regarded the good spirit and the evil spirit. He observes,

Then it is characteristic of the evil spirit to harass with anxiety, to afflict with sadness, to raise obstacles backed by fallacious reasonings that disturb the soul. Thus he seeks to prevent the soul from advancing.

It is characteristic of the good spirit, however, to give courage and strength, consolation, tears, inspirations, and peace. Thus, he does by making all easy, by removing all obstacles so that the soul goes forward in doing good (141–142).

This passage personifies these contrasting spirits and attributes to them means and ends. Recent writings on discernment tend to omit such attribution of good and evil to personal spiritual beings; instead, writers focus on the internal states of discerners when addressing discernment of spirits. Ignatius, however, kept them distinct and kept both in view. In fact, immediately following the statement just quoted, he goes on to address discerners' interior states of consolation and desolation.

3. Spiritual Consolation. I call it consolation when an interior movement is aroused in the soul, by which it is inflamed with love of its Creator and Lord, and as a consequence, can love no creature on the face of the earth for its own sake, but only in the Creator of them all. It is likewise consolation when one sheds tears that move to the love of God, whether it be because of sorrow for sins, or because of the sufferings of Christ our Lord, or for any other reason that is immediately directed to the praise and service of God. Finally, I call consolation every increase of faith, hope, and love, and all interior joy that invites and attracts to what is heavenly and to the salvation of one's soul by filling it with peace and quiet in Christ our Lord.

4. Spiritual Desolation. I call desolation what is entirely the opposite of what is described in the third rule, as darkness of soul, turmoil of spirit, inclination to what is low and earthly, restlessness rising from many disturbances and temptations which lead to want of faith, want of hope, want of love. The soul is wholly slothful, tepid, sad, and separated, as it were, from its Creator and Lord. For just as consolation is the opposite of desolation, so the thoughts that spring from consolation are the opposite of those that spring from desolation (142).

St. Ignatius framed consolation and desolation in terms of the divine-human relationship. Internal states are not only psychological; they are also spiritual in their nature, causes, and implications.

For further study, Fleming (1996) offers an accessible contemporary interpretation along with a literal translation of *Spiritual Exercises*. Fleming (2004) and Gallagher (2005) provide commentary and guidance for practicing the Ignatian exercises. For applications of the exercises to the development of organizational leaders, see Lowney (2003, ch. 6) and Vermander (2010).