

Territorial Development Series



Roots and Wings of Action Research for Territorial Development

Connecting local transformation and international collaborative learning

Edited by Miren Larrea

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Orkestra - Basque Institute of Competitiveness
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Note for the reader

The contributions in this book have been written in English, Spanish and Portuguese and their contents synthesized also in Basque, Norwegian, German and French. By choosing to have an inclusive approach to all these languages we want to generate awareness on the fact that action research is conducted throughout the world in diverse cultural contexts and in multiple languages, although many of these languages disappear when action research enters the academic realm.

To go beyond the symbolism of this decision and make our work understandable for as many readers as possible, we will publish in 2021 a book that will mirror this one by sharing its contributions in English translated into Spanish and its contributions in Spanish translated into English.

Notas para los lectores

Las contribuciones compartidas en este libro han sido escritas en inglés, español y portugués y sus contenidos resumidos también en euskara, noruego, alemán y francés. Nuestra decisión de tener una aproximación inclusiva al uso de todos estos idiomas responde a nuestro deseo de generar conciencia de que la investigación acción a lo largo del mundo se hace en diversidad de contextos culturales y en múltiples idiomas y que muchos de estos idiomas desaparecen cuando la investigación acción llega al ámbito académico.

Más allá de la dimensión simbólica de esta decisión, queremos compartir nuestro trabajo con el mayor número de lectores posible y en 2021 publicaremos un libro que será un espejo de este y que presentará las contribuciones publicadas en inglés en este libro traducidas al español, y las contribuciones en español traducidas al inglés.

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Chapter 1

Organisational leadership to support the development of action research environments in university institutes: the case of Orkestra – Basque Institute of Competitiveness

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Laburpena

Ikerketa institutuetan ekintza-ikerketarako inguruneen garapena bultzatzeko erakunde-lidergoa: Orkestra-Lehiakortasunerako Euskal Institutuaren kasua

Unibertsitateak ez dira ikerketa-ekintza (IE) gauzatzeko toki bakarrak, baina egungo gizarte erronkei erantzuteak eskatzen dituen eraldaketa sakonak bultzatzeko IE sustatu nahi bada, unibertsitateak oso leku aproposak dira. Unibertsitateetan egiten den IERI buruz dagoen literatura (Greenwood eta Levin, 2016), batez ere IE egiten duten ikertzaileek idatzia da, baina ez du kontutan izaten unibertsitateetako ikerketa zentroetako zuzendari edo kudeatzaileen ikuspegia. Kapitulu honen ekarpena ikuspegi horretan zentratzen da.

Ikerketa Zentroak oso ingurune egokiak dira IE egiteko, akademiak bere kontestuko garapen sozio-ekonomikoan gero eta paper garrantzitsuago jokatu beharko luketela dioten ikerketak gero eta ugariagoak baitira (Aranguren *et al.*, 2016a eta 2016b), baina unibertsitateetan ez dira askotan funtzio hori jokatzeko beharko liratekeen baldintza egokiak sortzen (Alcalde *et al.* 2017). Kapitulu honen helburua IE egiteko baldintza egokiak sortzeko ikerketa zentroetako zuzendariak jokatu dezaketen paperaren inguruan erreflexio bat egitean datza.

Erreflexio hau egiteko kapituluaren Orkestra-Lehiakortasuneko Euskal Institutuko (Deustuko Unibertsitatea) neure kudeaketa esperientzian oinarritzen naiz, Orkestran azken 13 urteetan nazioarteko gure lankideekin elkarlanean Lurralde Garapenerako Ikerketa Ekintza (LGIE) bultzatu baita. Orkestran, nire kudeaketa esperientzia aldatzen joan da: 2007-2012 bitartean, 12 pertsonaz osatutako Klusterrak, Berrikuntza eta Lurralde Garapenerako saileko koordinatzailea izan nintzen eta 2012tik aurrera Orkestrako (35 pertsona) Zuzendari Nagusia naiz.

Kapituluan Larrea (2019) lanean inspiratu naiz. Lan horretan, kudeaketako ikuspegia kontutan izaten bada ere, ikertzailearen ikuspegitik LGIE sortzeko bititako esperientzian

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oinarritzen da. Kapitulu honetan ordea kudeaketatik egiten dut irakurketa, eta zehazki nire kudeaketan eragin handia izan duen «lidergo estiloan» zentratzen naiz. Lidergo estiloan lagungarrien izan zaidan markoa Ignaziotar Lidergoa izan da.

Guibert (2017a)-k, Loiolako Ignazioren bizitzan eta hark idatzitako dokumentuetan oinarrituz Ignaziotar lidergoaren ezaugarri nagusienak azpimarratzen ditu. Haietatik, kapitulu honetan bereziki kontutan izan ditudan ezaugarriak hauek izan dira: (1) Gauzak, pertsonak eta instituzioak aldatzeko aspirazioak dituen pertsona izatea (Ignaziotar Magis-a); (2) pertsonatan zentratzen den lidergoa izatea, haien zerbitzura egoteko, beste pertsonetan konfiantza duen pertsona izatea; (3) kolaboratzaileak bilatzen dituen pertsona izatea eta besteekin kolaboratzen dakiena; (4) bere arduran dagoen erakundearen misioa zerbitzatzeko eta bere sostengarritasunerako antolaketa eta instituzionalizazio modu berrietan pentsatzeko gai den pertsona izatea; (5) bere erakundean pertsonen giza ezaugarriak zainduko dituen pertsona izatea. Ignaziotar Lidergoaren markoa eta nire kudeaketa esperientzian oinarrituz ondorengo galdera lantzen da kapituluan: Nola eragin du nire lidergo estiloak IEren garapenean?

Kapituluan burutzen den erreflexioaren helburua ez da IEren garapena errazteko bultzatu beharko litzatekeen lidergoaren patroi bat proposatzea, baizik eta IE bultzatu nahi duten ikertzaileei kudeaketako ikuspegia hobeto ulertzen laguntzea eta IE bultzatu nahi den erakundeetako kudeatzaileetan IE errazteko balditzen inguruan dituzten erronkei buruzko erreflexioa sustatzea.

Resumen

Liderazgo organizacional para el apoyo al desarrollo de entornos para la investigación-acción en institutos de investigación: el caso de Orkestra-Instituto Vasco de Competitividad

Las universidades no son el único contexto en el que se desarrollan los procesos de investigación- acción (IA), pero son contextos idóneos si se quieren impulsar procesos de IA para abordar transformaciones profundas que respondan a los grandes retos sociales.

La literatura sobre la IA que se desarrolla en las universidades está escrita fundamentalmente por investigadores que hacen IA (Greenwood y Levin, 2016), pero no tiene en cuenta la perspectiva de la dirección o de los gestores de los centros de investigación de las universidades.

Dada la proliferación de trabajos que subrayan que la academia debe jugar un papel cada vez más activo en el desarrollo socioeconómico de los lugares en los que se encuentra (Aranguren *et al.* 2016a eta 2016b), los centros de investigación son contextos idóneos para desarrollar la IA. Sin embargo, muchas veces en las universidades no se generan las condiciones adecuadas para desarrollar esa función (Alcalde *et al.* 2017). El objetivo de este capítulo es hacer una reflexión sobre el papel que puede desempeñar la dirección de los centros de investigación para generar los contextos adecuados para desarrollar la IA.

Para abordar esta reflexión me baso en mi propia experiencia de gestión en Orkestra-Instituto Vasco de Competitividad (Universidad de Deusto), dado que, a lo largo de los últimos 13 años, en Orkestra se ha impulsado la *investigación acción para el desarrollo territorial*, en colaboración con otros investigadores a nivel internacional. Mi experiencia de gestión en Orkestra ha evolucionado de ser coordinadora del Área de Clústeres, Innovación y Desarrollo Territorial (2007-2012) con 12 personas a asumir la Dirección general de Orkestra a partir del 2012 (35 personas).

En el capítulo me he inspirado en Larrea (2019). En ese trabajo, aunque se tienen en cuenta aspectos de gestión, la perspectiva del análisis es la experiencia de la persona investigadora al impulsar la IADT. Sin embargo, en este capítulo, la reflexión se aborda desde la perspectiva de la gestión, más concretamente se centra en el «estilo de liderazgo» de la dirección, aspecto que tiene una gran incidencia en la gestión. El marco del estilo de liderazgo que más ha incidido en mí ha sido el del Liderazgo Ignaciano.

Guibert (2017a), basándose en la vida de Ignacio de Loyola y en sus escritos subraya las características esenciales del estilo de Liderazgo Ignaciano. Las que se han considerado particularmente en este capítulo son las siguientes: (1) Ser persona que aspira a cambiar las cosas, las personas y las instituciones (Magis Ignaciano); (2) Tener un liderazgo basado en las personas, al servicio de ellas y que confía en las personas; (3) Ser persona que busca y sabe colaborar con otras personas; (4) Ser persona que es capaz de servir a la misión de su institución y de pensar en nuevas formas de organización e institucionalización para la sostenibilidad de su institución; (5) Ser persona que cuida la calidad humana en su institución.

Basándome en el marco del Liderazgo Ignaciano y en mi experiencia de gestión, la pregunta sobre la que reflexiono en este capítulo es: ¿Cómo ha incidido mi estilo de liderazgo en el desarrollo de la IA? El objetivo de esta reflexión no es proponer un patrón de estilo de liderazgo para generar contextos de IA, sino ayudar, por un lado, a que los investigadores en la acción puedan entender mejor la perspectiva de la gestión, y por otro, a generar en los gestores de centros de investigación una reflexión sobre los retos para impulsar buenas condiciones para la IA.

Organisational leadership to support the development of action research environments in university institutes: the case of Orkestra – Basque Institute of Competitiveness

Introduction

Whilst it is true that universities are not the only environment where action research is carried out, they are a relevant environment if action research (AR) is to play a significant role in facing societal challenges in times of profound transformation.

Indeed, literature about AR in universities does exist (Levin and Greenwood, 2018), but it is mainly written by action researchers and often misses the perspective I want to make explicit in this chapter, i.e., the perspective of research institute managers in universities.

Research institutes can be an excellent context in which to develop AR. Although academia is increasingly asked to play a strategic role in place-based processes of socioeconomic development (Aranguren *et al.* 2016a and 2016b), universities do not always facilitate the working environments needed to fulfil this role (Alcalde *et al.* 2017). As Levin and Greenwood (2018) highlight, conventional disciplinary organisation and the separation of pure and applied work in universities is inimical to the development of AR. In this regard, research institutes, whose mission is to serve as change agents, can offer the right context to develop AR.

However, these institutes are not exclusively a place for researchers. They are collective endeavours, where management plays a relevant role. The goal of this chapter is to reflect on the role of managers in the development of AR environments.

The experience that inspires this chapter is my role as manager at Orkestra, the Basque Institute of Competitiveness (University of Deusto), where Action Research for Territorial Development (ARTD) has been constructed together with our international partnerships. I started at Orkestra as a researcher in 2006, developing projects in collaboration with another researcher and with territorial actors, which were mainly Basque local development agencies and cluster associations. From 2007 to 2012, I was the coordinator of the area of Clusters², Innovation and Territorial Development at Orkestra, and during this period, I conducted several research projects while also managing a group of 12 people. In 2012, I was appointed general manager of Orkestra, and since then, my main role has been to lead Orkestra (a team of 34 people), and although I have participated in some research projects as a researcher, this has become a secondary role for me.

My inspiration for ARTD when writing this chapter comes from Larrea (2019), where she shares her perspective on how ARTD evolved at Orkestra, transforming not only the Institute but also some areas in the University of Deusto. Although she incorporates the role of managers in her article, her perspective is, unavoidably, that of a researcher. In this chapter, I depart from that piece of work in order to incorporate the perspective of the management of research organisations in ARTD.

Organisations and their management is a multidimensional issue, all of which could not be addressed in this chapter. That is why I focus on the feature that I consider to be more determinant in my management role: my leadership style. During the last few years, I have cons-

² According to Porter (1990), clusters are “geographic concentrations of interconnected companies, specialized suppliers, services providers, firms in related industries, training institutions and support organizations linked around technologies or end product within a local area or region”.

ciously reflected on and worked to develop my leadership style, and the framework that has helped me most is *Ignatian* leadership (its secular equivalent is service leadership). There are different Catholic reform movements relevant to AR, such as the Franciscans, the liberation theology, etc. My approach, the Ignatian one, is based on the Society of Jesus. I studied at and now work at the University of Deusto, a private university owned by the Society of Jesus.

According to Guibert (2016, p. 6), Ignatian leadership is inspired by the life and experience of Ignatius of Loyola. Based on the analysis of Ignatius's life and the documents he wrote, Guibert (2017a) highlights the main features of Ignatian Leadership. I use the following for this paper: (1) to be a person with many aspirations who wants to change things, people and institutions (Ignatian *magis*); (2) to be a person who trusts others and who puts others at the centre so as to serve them; (3) to be a person who finds collaborators and knows how to collaborate; (4) to be a person capable of thinking of new ways of institutionalisation and organisation that serve the mission and who takes care of his/her organisation and its sustainability; (5) to be a person who cares about human qualities in the organisation.

As Guibert (2017b, p. 14) also highlights, Ignatian leadership is totally compatible with service leadership, because the service dimension is fundamental in both types of leaderships. Dierendonck (2011) defines service leadership as of leaders who combine their motivation to lead with a need to serve. Service leadership is demonstrated by empowering and developing people, by expressing humility, authenticity, interpersonal acceptance and stewardship, and by providing direction.

With this theoretical background in mind, I pose a twofold research question that inspires this chapter. How has my style of leadership influenced AR? And how has AR influenced my style of leadership?

To answer these questions, I have gathered data on my management role in the different stages of the development of ARTD at Orkestra. Combining the concepts in the theoretical framework with my experiences at Orkestra, I share a discussion of the role that research institute managers play in the development of AR. The aim of the discussion is not to generate any pattern, which I cannot do based exclusively on my own experience, but rather to help researchers better understand the managerial perspective, and also to help managers reflect on their challenges when developing environments for AR.

Theoretical background: Ignatian leadership

An introduction to Ignatian leadership

As stated by Guibert (2016, p. 6), Ignatian leadership means that it is inspired by the life and experience of Ignacio of Loyola. Ignatian leadership, therefore, goes beyond the Jesuits and is also a leadership style for non-Jesuits if it is inspired by his experience. The life and experience of Ignatius of Loyola are reflected in the Spiritual Exercises he wrote to help renew people's spiritual growth and to find God in one's life. But the key element regarding how he led people to respond to the Society of Jesus's Mission is also reflected in the Constitutions and the Letters he wrote. Based on the analysis of Ignatius's life, together with these documents and also the leadership literature, Guibert (2017a) highlights the following main aspects of Ignatian leaders:

1. A person with many aspirations who wants to change things, people and institutions. This refers to the Ignatian *magis*: doing more for others than for ourselves. The aspiration is to serve others and God. It is a nonconformist style that always aspires to improve oneself to be able to serve others.

2. A generous and committed person, where the focus is not on finding self-security but on opening one's heart, finding inner freedom, and being willing to be vulnerable, to risk and share.
3. A person with excellent social skills: leadership is about human relations. It is not about applying indicators and controlling people but about accompanying them in all their human dimensions.
4. A person who knows himself or herself and manages his/her own inner life well. To serve others, you first need to know yourself.
5. A person with a deep understanding of the facts. A person who has a wide perspective when reading situations and who has the inner freedom to make choices.
6. A person who puts others at the centre so as to serve them and who trusts others. A person who accepts and loves people as they are.
7. A person who finds new ways of doing things and produces changes to be able to serve.
8. A person who finds collaborators and who knows how to collaborate.
9. A person capable of thinking of new ways of institutionalisation and organisation to serve the mission and who takes care of the organisation and its sustainability.
10. A person who cares about human qualities in the organisation, and about honesty, virtue and kindness in people.

Why is Ignatian leadership suitable for AR?

AR aims to contribute, through research, to generating new actionable knowledge that is valuable for action and that contributes to academic knowledge. The mission of Orkestra is very connected to this idea, as its mission is to contribute, through research, to the improvement of real competitiveness of the Basque Country and the welfare of its citizens, as well as to generate new knowledge on regional competitiveness.

In order to achieve these two impacts, i.e., impact in practice and academic impact, in AR it is crucial that there is dialogue and collaboration with the different societal actors who, together with their decisions, contribute to the competitiveness and welfare of territories. In addition to this, it is fundamental to define a research agenda that is connected to the real challenges actors face and to define it in collaboration with them, as well as to co-generate new knowledge to be able to address these challenges together with the actors. This means that the researcher should aspire to produce change and have the right attitude to collaborate and work together with the territorial actors to jointly generate new knowledge and contribute to addressing the issues at stake. If the management style of the researcher's working context facilitates and values these aspirations and attitudes, this will create a better environment for developing AR.

There are five characteristics of Ignatian leadership that facilitate the development of better environments for AR. The first characteristic is *magis*, the aspiration to change things, people, and institutions. AR is about generating change through research, and this is easier if institutional leaders also value and try to produce change. The second characteristic is that Ignatian leaders put others at the centre to be able to serve them. If we have a leader who is focused on serving people in the organisation and elsewhere, it will also be easier for us to serve others. And AR researchers need to have a serving attitude, as they have to try to help the actors meet their challenges. The third crucial characteristic of Ignatian leadership is that collaborators are needed to be able to respond to the mission. If leadership itself follows a collaborative approach to work, this culture will facilitate the development of collaborations

by members of the organisation, which is key to the AR approach. The fourth fundamental characteristic of Ignatian leadership is that the leaders need to have the capability to find new ways of institutionalisation and organisation to be able to respond to the mission; i.e., they should be flexible if the organisation needs changing to contribute better to the mission. This flexibility helps AR researchers find the best modes of collaboration with the actors in order to help them. And finally, caring about human qualities, which is another key aspect of Ignatian leadership, facilitates taking care of people who take care of others.

ARTD at Orkestra: challenges, actions, and leadership in management

For the development of the case, I adopted a self-reflective case study approach. While self-reflective or biographical approaches can be difficult to generalise, they offer the significant advantage of illuminating the details of experience (Tight, 2012). Moreover, it is well acknowledged that single case studies are particularly useful when there is a need to capture the complexity of a phenomenon in depth, so as to generate concrete, practical knowledge that is, by definition, context-dependent (Flyvbjerg, 2006; Stake, 1995).

A managerial perspective on ARTD

In Larrea (2019), Miren Larrea presents the development process of ARTD in Orkestra in which an average of 10 researchers and research assistants were directly involved. Although her article mainly focuses on the perspective of research teams and not management, the case focuses on the role of the two people that initiated the process. One of them is Miren, a researcher who joined the Institute in 2007 and has focused on developing ARTD since 2008. The other individual is me. I joined the Institute in 2006 as a researcher, and in 2007, I took on the responsibility of coordinating one of the departments. I became general manager in 2012, and since then, I have supported ARTD from my position as manager.

In 2006 I was working at the Faculty of Economics and Management of the University of Deusto. My main motivation to join Orkestra was its mission of carrying out research for the *real* improvement of Basque Country competitiveness. I believed in the transformative capability we could develop through research. Accordingly, as Larrea (2019) underlines, I always presented the transformative mission of the Institute as something that everyone should respond to. In the first stages, I learnt that AR was a much more effective approach to foster transformation than the traditional and positivistic methods. I had the opportunity to learn this because in the years previous to the creation of Orkestra, I had been experimenting with both approaches to research: the positivistic approach adopted in my PhD and the AR approach in the projects in collaboration with Miren, and I felt that the second approach was more transformative (Karlsen *et al.* 2012). I found two main things. On the one hand, that an essential aspect for developing transformative capabilities for research was to foster an organisational culture based on some key common principles that guided the people at the Institute in finding their way to carry out transformative research. During our internal reflections at Orkestra, I identified five main principles that would help create a culture of transformative research³ (commitment to change; global vision, anticipation, and international projection; collaboration, openness, and flexibility; development of a systemic view; and independence and a constructive, critical view). When seen through the lenses of these principles, ARTD appeared to be a

³ Those principles are reflected in an internal document of Orkestra on Transformative Research.

very solid approach to carry out transformative research. On the other hand, I acknowledged that depending on the interpretation of each person at the organisation, concerning the kind of transformation that he or she should foster with stakeholders, members of the organisation could adopt research approaches other than AR⁴. Therefore, carrying out a pragmatic AR approach which uses any method that supports the work is a coherent attitude towards research. I believe that one of the unique values of Orkestra is how we do research, and I consider ARTD to be an example of how we, at Orkestra, conceptualise transformative research.

Different stages of ARTD from the managerial perspective

To share how ARTD has evolved at Orkestra and the challenges and actions that I, as a manager, took to foster ARTD at the Institute, I have split this development into the same four stages that Larrea (2019) presented in her work (see table 1). For each of them, in Table 1, I share what I consider to be the challenges I met, the actions I fostered, and the dimensions of leadership that influenced those actions. The following subsection presents my perspective on each of these stages.

Table 1. Stages of ARTD development at Orkestra. Challenges and actions taken by the management and contributions from leadership

Period	ARTD at Orkestra	Challenges and actions related to ARTD	Key aspects of leadership
2006-2008	Antecedents to the decision to develop AR at Orkestra	Collaboration and construction of social capital with actors is time consuming, need for profiles to facilitate it and need for the board and stakeholders to believe in the potential of ARTD so as to implement Orkestra's mission	Aspirations to improve, open to change and find collaborators
2008-2010	First organisational attempt to develop AR at Orkestra	Facilitate learning about AR in order to increase the transformation capacity	Put other people at the centre (wide perspective)
2010-2014	The development of AR in specific projects and organisational change	From area coordinator to general manager. Organisational change. Trust-based internal and external relationships	New modes of organisation, human qualities
2014-2016	Cultural change and reappearance of AR onstage	Effort to go further with the transformative capability. Second attempt to facilitate learning about AR	Many aspirations, find collaborators

⁴ Based on the internal document on Orkestra's distinctive value which I presented to Orkestra's Board in February 2015.

Antecedents to the decision to develop AR at Orkestra (2006-2008)

My first decision to support ARTD was when I decided to involve a researcher who did research in practice. That is why Miren Larrea joined Orkestra in 2007. I felt that to fulfil the transformative mission of Orkestra, we needed to collaborate and construct social capital with different key actors to find out about and understand their challenges, and thus contribute with new knowledge to tackle these challenges. So, during 2007, Miren and I explored a collaborative project using an ARTD approach with local development agencies and discovered that developing projects in collaboration was very time-consuming. To facilitate the interaction with stakeholders, we needed people with a different profile and hence decided to hire someone to help with this interaction. But the initial idea regarding the organisation of Orkestra was to hire mainly researchers, and I had to convince the administration board and the management team to add this new profile. When our general manager asked me to make a presentation at the board meeting of November 2007, I underlined that “if we want to be a transformative institute, we need to collaborate with different stakeholders, and to do that, we need people capable of dynamizing these collaborations”. In 2008 we hired someone without any academic profile who could facilitate the interactive processes with stakeholders. This particular discussion illustrates that there was a perception in the organisation that action research was not research, or at least that it was academically dubious. The way in which we overcame this situation was not by trying to convince everybody that it was *also* research but by demonstrating it with actions, i.e., working on generating transformations and also publishing academic papers. One of my main roles at this stage was to discuss the desirability of developing action research both with our administration board and our management team.

The main feature of Ignatian leadership that helped me in this particular stage was my strong aspiration to improve our organisation, to open it to change, and find outside collaborators.

First organisational attempt to develop AR at Orkestra (2008-2010)

As presented in Larrea (2019), it was in this period that Miren wrote a document about the changes that would be necessary to create an AR environment in Orkestra. We wanted to consolidate an AR team at the Institute, and we wanted it to adopt AR as part of its unique value proposition.

I believed that AR was a better approach for the transformative mission of the Institute than the traditional research we carried out in our research programme. My motto was “Reports do not change territories. If we want to be an agent of change, we also need to change the way in which we do research”. With this idea in mind, we created a reflection group where we shared our aim of developing AR through regular meetings for one year. By the end of the year, however, we felt that we might have been pushing too hard. My view is that, on the one hand, the people in the group did not have any experience in AR and, on the other hand, they had a different view from us about the type of transformation that Orkestra should foster through research. I realised that to be able to decide freely whether we were convinced or not about the AR approach, we needed to experience it in practice in order to have a deeper understanding of AR processes. As area coordinator, I felt that I had to be very clear about the transformative mission of Orkestra but without forcing one way of achieving it, even if I believed that AR was the most transformative approach.

My role, therefore, during this stage, was to facilitate a working environment where each person could find his or her own way of bringing about this transformation through research. I tried to develop an open and collaborative approach to research with different

stakeholders, and the number of researchers interacting with them grew. In the area meeting of June 23rd, 2008, I made a presentation where, for the first time, I used the term *transformative research* as a central concept in my understanding of the Institute.

I think that the feature of Ignatian leadership that best explains my leadership throughout this stage is the aim to put other people, in this case, members of Orkestra, at the centre of my activity.

The development of AR in specific projects and organisational change (2010-2014)

As discussed in Larrea (2019), it was during this period that ARTD evolved at Orkestra, following a pluralistic approach to AR which integrated “not a team of action researchers, but rather heterogeneous teams of researchers and practitioners” (Karlsen & Larrea, 2014, p. 121). After giving up our first attempt to create an internal reflection process for the development of AR, ARTD progressed mainly in the context of research projects.

At the organisational level, the new general manager that had been recruited in 2009 delegated the coordination of each area to coordinators. Consequently, the way of working on projects and the way of managing people depended significantly on the leadership style of each coordinator (Alcalde *et al.*, 2017). In 2012, the general manager left and I took on this role. At the start of this period, a strategic reflection process for the development of the 2013-2015 Strategic Plan brought to light various concerns about Orkestra’s functioning, notably the cultural differences between the areas, the need to carry out cross-cutting projects between them, and the need to build a more open organisation to address Orkestra’s mission more effectively.

I proposed to make the organisation flatter, eliminating areas, and opting instead for an organisation based on projects. This organization model is at odds with the essence of university organisation, and it was possible to adopt it thanks to Orkestra’s governance, which has a high degree of autonomy from the university. I decided to take trust-based management as a guiding principle for this new organisational structure. This approach was inspired in part by Román (2007, p. 1): “Trust is what feeds projects; it is the germ of creativity; a fertilizer so that talent can spread its wings; a seed that brings out the best in each one; an invaluable driver of creation. When there is trust, all talent seems better than it is; it expands; it opens up and reaches unexpected heights. Trust acts as a leverage factor”.

In November 2012, at a meeting with all members of Orkestra, I shared my intention by saying: “the Institute will be based more on trust than control, though I acknowledge the need for both components to be present”⁵.

To guide the development of this new organisational model, the following principles were established. The model should (1) respond to the singularity of the Institute, i.e., its capacity to carry out transformative research; (2) be dynamic, agile, and flexible to adapt to rapid changes in the surroundings; (3) facilitate that each person, with his or her pro-active attitude and capacities, can add value in line with the Institute’s mission; (4) be open, given that the singularity of Orkestra requires work to be carried out in collaboration with other agents of competitiveness; and (5) facilitate conversations and experimentation for ongoing learning and change⁶.

⁵ Presentation in the general meeting on 21st November 2012.

⁶ Those principles are reflected in an internal document of Orkestra on Transformative Research.

At this stage, I firmly believed that ARTD could be more transformative than other research approaches. However, my way of supporting it was not straightforward. I created an environment where researchers could develop new (to the organisation) research approaches as long as they met the previous principles. I felt that there were people in the organisation that would develop AR in this context. Furthermore, after we had given up our initial reflection group, ARTD was made less explicit in Orkestra's formal agenda and was developed in the context of specific projects.

When I became the general manager of Orkestra, the Ignatian feature that guided my work was my motivation to explore new forms of organisation that would take us closer to our mission while increasing the human quality of our project.

Cultural change in the organisation and new efforts to develop ARTD (2014-2016)

The organisational change led to a flat organisation (based on projects rather than departments), which reinforced flexibility and participative decision-making, encouraged trust-based and distributed leadership, and promoted the importance of developing sustainable interactions with the external environment (Alcalde *et al.* 2017). This trust-based distributed leadership helped different researchers at Orkestra take on the responsibility of working on research projects with various key stakeholders in long-term, trust-based collaborations. In accordance with the mission of Orkestra, they worked with those stakeholders on facilitating change, through research, to meet the stakeholders' challenges of competitiveness.

I felt at that moment that Miren's learning experience of fostering ARTD at Orkestra and the Gipuzkoa Sarean⁷ project was invaluable and could facilitate a learning process for researchers trying to foster transformative research in their projects. In our first attempt at generating an AR learning space at Orkestra in 2008, we did not have this practical experience. That is why I asked Miren to facilitate a new insider learning process, and thus during 2015 and 2016, a second insider learning process took place. As explained in Larrea (2019), ten researchers and research assistants participated in this learning process through monthly workshops. Some of the participants' aims in the process were to define a transformative communication approach for the Institute through AR or to develop a guide for training processes at Orkestra inspired by educational AR. When the process was halfway through, Miren delegated this responsibility to other people. In private, she told me that she did not feel entitled to facilitate the process. I helped her with this transition.

My interpretation of this stage is that there are different levels and intensities of transformation and, even though Orkestra's mission is assumed by its members, each of us interprets our role in a different way. Miren had in mind more profound and more structural transformations than most of the other participants in the learning process. Consequently, I faced the challenge of managing a situation in which the transformative role of Orkestra was interpreted in multiple ways. As a researcher, I believe that ARTD is the most powerful approach for in-depth transformations. However, as the general manager of Orkestra, I need to facilitate an evolutionary approach to the transformations that we are capable of fostering now in order to reach more profound changes later. The need for transformation has to be acknowledged both by the stakeholders and the researcher working with them. This acknowledgement is gained over time and through

⁷ See further information on this project in the Introduction of this book.

capability development, not only by the researchers and research assistants at Orkestra but also by our main stakeholders.

The Ignatian feature that I use to explain my experience in this stage is the relevance of living with a multiplicity of aspirations, trying to find collaborators and not people that will merely obey.

Discussion: can any management style of leadership be supportive of AR? What are the implications?

This chapter focuses on the characteristics of leadership that can hinder or facilitate the creation of better environments for AR in research institutes at universities. It aims to help managers of this kind of organisation who are interested in creating AR environments and also to help researchers interested in working with AR approaches to reflect on which characteristics of their organisational leadership could be useful for developing AR.

In this final section, I synthesise the main insights I derive from the previously presented narrative of how management and AR have coexisted at Orkestra. I underline four key characteristics of AR and their connection with Ignatian leadership that best explain my interpretation of my own leadership style throughout these years.

Table 2. Core ARTD features supported by Ignatian leadership

Core ARTD features	Ignatian leadership feature that facilitates them
Co-generation of actionable knowledge with stakeholders	Aspiration to change
Academic and societal impact also inside universities	Aspiration to change institutions and flexibility to adapt organisations to better respond to the mission
Direct dialogue between researchers and stakeholders	Put others at the centre so as to serve them
Negotiation of the research agenda with stakeholders	Seek collaboration, not obedience

a) *Co-generation of actionable knowledge with stakeholders*

One of the key characteristics of ARTD is connected with its aim. Action researchers aim to produce change through research, and that is why the co-generation of knowledge among researchers and actors, together with the generation of actionable knowledge, are features of ARTD. One of the key characteristics of Ignatian leadership is also the aspiration to change (*magis*). That means improving one’s competency in order to serve others better and build a better world (for Christians to build the Kingdom of God on earth). If university and research centre managers had the aspiration to bring about change, the researcher’s aspirations would be more aligned with the aspiration of the organisation’s leader which would result in a better environment for ARTD.

b) *Academic and societal impact also inside universities*

However, the aspiration to change cannot be interpreted exclusively as an aim to help others change. Universities themselves also need to change to contribute more effectively to change. In the case of ARTD, there is an emphasis to achieve not only academic impact but also societal impact inside the university. The incentives system and modes of organisation have to be adapted to evaluate not only the generation of knowledge but also the practical impact of their research. An Ignatian feature that supports this aspiration by action researchers is the aspiration to change institutions, to make them useful. Consequently, for an Ignatian leader, the mode of organisation has to be flexible to better meet its mission, which in practice was possible because of the governance structure of Orkestra.

c) *Direct dialogue between researchers and stakeholders*

Direct dialogue between researchers and stakeholders is a feature of ARTD required by the aim of action researchers to contribute with useful knowledge to stakeholders' challenges. Researchers need to know stakeholders, their aspirations, and values to better contribute to responding to their challenges. This is an approach that implies wanting to move from serving through research to serving through action. In order to achieve this, a useful key feature of Ignatian leadership is the leader's motivation to serve others. If the leader gives the example with his or her attitude of serving others, it will be easier to create a culture of serving others. And although it will not be enough, because the researcher's motivation should also be to serve, it will be helpful even if nowadays research policies following the education ministry's incentives reinforce disciplines and pure academic results at the expense of engagement and interdisciplinarity.

d) *Negotiation of the research agenda with stakeholders*

And last but not least, the negotiation of a research agenda with stakeholders is another key characteristic of ARTD. Despite potential differences in perspective and interests, action researchers recognise the need to collaborate with stakeholders in order to generate actionable knowledge. Another key characteristic of Ignatian leaders is that he or she will seek to find collaborators, not people that merely obey him or her. If the leader finds collaborators, the culture of the organisation will be collaborative, and this will facilitate researchers to build a collaborative relationship with stakeholders.

I close this section with a final reflection. The thread running through this chapter helps us understand how the Ignatian features adopted during my leadership *facilitated* the generation of an ARTD environment in Orkestra. But I think that the thread could also have been interpreted the other way around, by analysing how the Ignatian features of my leadership style were *reinforced* by the development of ARTD at Orkestra.

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