

# FORMATION OF JESUITS FOR LEADERSHIP AND GOVERNANCE

## REPORT AND RECOMMENDATIONS TO THE JESUIT CONFERENCE BOARD - USA

Task force on formation and leadership - USA

### *History*

In July 2007, the Jesuit Conference board completed a set of agreements and commitments regarding the future direction of the United States Assistancy entitled *Responding to the Call of Christ: A Renewed Way of Proceeding for Our Mission Today*. In the section on “Jesuit Life,” the provincials recognized “the importance of forming Jesuits for leadership roles both in governance and in the apostolates” and stated their intention “to appoint a task force to propose, by May 2008, comprehensive directions for this effort.” By August 2007 a task force comprising 11 members — lay and Jesuit, men and women, representing a broad range of perspective and disciplines — had been formed; the task force completed its mandate over the course of two meetings totaling four and one-half days during the ensuing months. Both before and between meetings the task force members conducted research in areas such as adult education, leadership theory and assessment tools; it also surveyed formators, superiors and younger Jesuits regarding attitudes on formation for leadership and governance in order to assess needs and develop appropriate responses. In pursuing its mandate, the task force employed the initial framework that it received from the Jesuit Conference board. The findings and recommendations of the task force were reviewed and commented on by the Committee of Province Formation Assistants before the completion of the final report.

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### *Importance and Urgency*

The importance and urgency of action to develop and implement a program of formation for leadership and governance is attested to by: the high priority given this matter by most respondents in the initial strategic discernment interviews in 2004 and by *all* of the planning commissions; Fr. Kolvenbach's remarks to the Jesuit Conference board in October 2006;<sup>1</sup> the provincials' own *Examen* of February 2007; the Regional Order of Studies (#21); the survey of Jesuits in December 2007; the Governance Document of the 35<sup>th</sup> General Congregation (#30-32); and the personal and professional experience of the task force members. The task force firmly believes that a well-developed program of formation for leadership and governance is not only essential for the successful formation of ours toward a healthy religious lifestyle, but is critical for the future of our apostolic mission and Jesuit identity. It is the considered and strongly-held opinion of the task force that our future and all planning efforts are at great risk without significant action to address this need.

### *Initial Framework*

The task force substantially accepted and worked within the framework provided by the Jesuit Conference board. This framework included: a critical distinction between *leading individuals* and *leading organizations* in regard to both communal religious life and apostolic life; an understanding that skills for leading individuals are necessary for *all* Jesuits and that skills for leading organizations are necessary for some; a belief that skills can be defined and taught through an intentional and sufficiently resourced program that includes clear expectations and rigorous accountabilities; and a conviction that such formation must extend through the entire life-cycle of a Jesuit.

### *Proposed Comprehensive Program for the Formation of Jesuits for Leadership and Governance*

#### **Purpose and Goal**

Because all Jesuits will exercise formal and informal authority – in particular those who are ordained — by virtue of *apostolic vows* and by virtue of *role*, the Society of Jesus seeks to prepared mature, balanced and

mission-based men to exercise this authority. By “authority” we mean here the conferral of power in exchange for service to an organization or individuals.

### **Values**

Unlike a business model of matching personal leadership aspirations with organizational needs, this model seeks to enhance the availability of Jesuits for mission: for being sent and being sent effectively. Therefore, both the program and the outcomes are grounded in these key values:

- 1) Our Ignatian & Jesuit Legacy
- 2) Being Men of the Church
- 3) Servant Leadership
- 4) Diversity and Inclusivity
- 5) Prayer and Discernment
- 6) Life-Long Formation
- 7) Disponability and Openness to New Challenges & Horizons
  - a) beyond one’s comfort zone;
  - b) beyond one’s parochial perspective;
  - c) toward an international perspective.

### **The Men Being Formed**

The men in formation come from a great diversity of backgrounds, a wide spectrum of leadership experience and training, and a broad range of ages. Because of this, a one-size-fits-all formation program would be neither desirable nor effective. Men will start in different places, progress at different paces, and learn in different ways. Such variety, however, does not mean that there cannot be pre-requisites and standards for formation in leadership and governance; indeed, a successful program hinges on such pre-requisites and standards. But for our men, success will come through a diversity of paths.

### **Leadership Competencies**

Leadership competencies may take the form of virtues (e.g., generosity), dispositions (e.g. openness) or skills (e.g., leading prayer).

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While we can form people in virtues, build on their dispositions and teach them skills, we can only do so if the person is pre-disposed to be formed and trained in these, and demonstrates the capacity to undertake such formation and training. A successful formation program will assume neither that it is working with a blank slate nor that it can effect remediation for those lacking in core pre-dispositions and capacities. Rather, it will ensure from the very start that those being formed possess the necessary pre-requisites for successful formation.

Assuming these pre-requisites then, we can understand growth in competencies as progressive stages leading to mastery. This mastery includes broadening one's facility with various competencies for a variety of settings depending upon the locus of the learning activities. For example, skills in personal self-expression might be broadened to include faith-sharing skills in community life, homiletic skills in apostolic life, and visioning skills in organizational leadership. Mastery, then, is not just about vertical progression; it is also about horizontal expansion of individual skills to include community and apostolic life manifestations. Such expansion need not always be sequential; there can be simultaneous growth in the individual, communal and apostolic dimensions of many competencies.

Even so, no single person will possess the capacity for *mastery* of *all* desired leadership competencies in *every* setting. However, that should not preclude formation to at least a level of minimal competency in those areas where a person's individual gifts, personality and opportunities make *mastery* unlikely. Further, there are some competencies that are so critical to our religious identity and mission that mastery of them ought to be considered *benchmark standards* at specified transitions in the formation process. While this task force does not define which competencies fit into this *benchmark* category, it does believe that agreement on and enforcement of benchmarks will be necessary for the success of the formation program.

The task force has identified formation in these areas of leadership competencies as important for all Jesuits:

- Commitment to Life-long Personal Growth through Ignatian Discernment
- Understanding of the Core Concepts and Dynamics of Leadership and Authority
- Ecclesial Skills
- Communication Skills

- Social Skills
- Relationship Skills
- Management Skills
- Disciplined Personal Habits
- Skills in Self-Care

Key behaviors and skills that illustrate and manifest these competencies are listed later in this report.

#### **Formation Process**

A successful formation process will be consistently applied throughout the assistancy. It will be overseen in each province by the director of formation and, at the local level, by the local superior and other formators, as appropriate.

#### ***It will include these key elements:***

a. Assessment and discrimination of each candidate at the time of application and acceptance in regard to his pre-disposition to and capacity for formation in leadership and governance according to the program outlined here.

b. A formal introduction to leadership and the exercise of authority as well as the Society's expectations for formation in this area during novitiate (2<sup>nd</sup> year) that would culminate in a formal assessment of leadership skills and identification of areas for growth and development for each man.

c. Development by each man of an *individual leadership formation program and portfolio* as part of the process of approval for vows; the portfolio will travel with the person through final vows and be updated regularly.

d. Personal and intentional initiative by each man to complete his program through an ongoing "action plan" that takes advantage of a variety of opportunities found in programs, ministerial activities and personal experiences. This "action plan" is updated periodically.

e. Supervision to provide support, direction, updating and accountability in an ongoing way (at the local level by superiors and directors of works) and at key transitions (by the director of formation).

f. Annual self evaluation, followed by conversation with one's local superior and supervisor.

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- g. Formal mentoring at every stage.
- h. Assessment that includes a variety of evaluative tools, decisions at key transition points and clear inter- and intra-stage coordination and communication.
- i. Adaptation and use of the *ad gubernandum* to support the ongoing formation of men with final vows.

### Programs

At the very heart of the formation is the initiative and intentionality of the man. He is responsible for his own portfolio, supported by regular assessment and feedback, supervision, mentoring and formation opportunities. The task force envisions four basic kinds of program opportunities for this formation:

1. *Common Programs for All:* These would be programs that virtually all Jesuits in formation would complete successfully, usually at fixed times (or before advancing to a next stage in formation). Examples of this might be the three-credit course in leadership theory offered in one location or a national required “ministry of management” program.

2. *Programs Created by the Marketplace:* Because of the demand created by younger Jesuits, enterprising schools or individuals would likely *create* programs to meet these demands that Jesuits might choose to participate in. Examples might include Pat McGrath’s workshop in board membership or a secondary school offering a summer workshop in lesson plan development and classroom management.

3. *Outside Programs:* Jesuits would take advantage of any number of established outside programs to meet formation needs. Examples might include addiction workshops, summer immersion programs or a *Dale Carnegie* course.

4. *Individualized Programs:* In each of his assignments, a Jesuit would intentionally seek out and negotiate opportunities and formal mentoring to pursue formation in leadership and governance. While in regency, for example, an agreement could be drawn up that would provide supervised and mentored opportunities to practice group dynamics, learn new teaching technologies or lead public prayer as part of his ministry in the work. Or through his spiritual director or a counselor, a man may do some intentional and guided work on his relationships with women in authority.

While the man's portfolio is not meant to be a checklist or a record of "hoop-jumping," he will use it to keep track of his initiatives so that he and others can reflect on, assess and continue to plan his growth in competencies for leadership and governance.

### **Accountability**

The program will fail unless there is a process for and measures of accountability that are vigorously implemented, consistent across provinces, and clearly communicated and coordinated in a man's movement from one stage to the next. Accountability involves, but is not limited to, evaluations and decisions about each man at key formation stages and transitions.

### **Accountability includes**

- Accountability to Self
- Accountability to immediate supervisors or program directors
- Accountability to peers
- Accountability to religious superiors
- Accountability to the director of formation

### **Progress in formation for leadership and governance will be formally assessed and evaluated as follows:**

- At the time of application: to assess pre-dispositions and capacities;
- Toward the end of novitiate: to develop the Individual Leadership Formation Program and Portfolio and create a first action plan;
- At key transitions: to facilitate *decisions* (i.e., about moving forward; staying put; remediation; or consideration of another vocation) and to update the action plan.

In addition, there will be an ongoing informal dialogue and annual formal review with one's local superior and professional supervisor.

### **Tools for Assessment and Evaluation will include:**

- An instrument for annual self-assessment.

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- *Informationes* (which would include explicit questions about formation for leadership and governance and formal feedback on these).
- An instrument for periodic 360 degree evaluation.

### Men Who Have Pronounced Final Vows

The task force recommends that provincials use the *ad gubernandum* as the principal tool for encouraging and inviting on-going self-initiated formation in leadership and governance. Therefore, the information on this form should be updated regularly so that it is current, and then brought to the account of conscience as part of the individual's ongoing apostolic discernment and to help him identify areas for further growth in leadership and governance formation. It may also be used as a tool to identify specific and proximate preparation needed for an anticipated leadership role, as well as to determine the suitability or unsuitability for such roles – both in Society governance and apostolic leadership.

### Training of Formators

Both the formation and the supervision of the formation will require formators trained in particular skills.

#### Formators include:

- Jesuits missioned to formation work.
- Superiors of communities that include men in formation.
- Directors of works and others in the work responsible for the supervision and mentoring of men on formation.

*Training of formators may include training in the following competencies, as appropriate*

- Leadership (theory and practice)
- Modeling
- Mentoring
- Supervision



- Consultation
- Assessment

The task force recommends that the training process for Jesuit formators include a self-assessment and the development of an individualized action plan.

### ***Implementation***

Before such a program can be implemented, there is significant groundwork and preparation required. The task force particularly recommends the following:

1. Issue a national paper from the provincials outlining the vision for the program, its critical importance, an outline of requirements and the process, and an unambiguous commitment to implement it.
2. Appoint a national steering committee and structure to oversee implementation and coordinate the following:

### **Create and Construct**

- a. Develop the leadership program and its specifics consistently across provinces, including and especially agreement on benchmarks, accountability and goals.
- b. Identify & recruit personnel who will train & help formators and mentors (educating the educators).
- c. Incorporate understanding of and commitment to the leadership program into provincial orientations & superiors colloquia.

### **Update/Create Assessment Processes**

- d. Incorporate pre-requisites for leadership in the criteria for acceptance into the novitiate.
- e. Commission the development of an instrument for initial assessment and the development of the individual program and portfolio.
- f. Revise *informationes* forms at all levels to include each of nine leadership formation categories;
- g. Prepare forms and processes for annual self-assessment and feedback from superiors/supervisors for men in formation.

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- h. Prepare forms and process for periodic 360 degree evaluation.
- i. Update *ad gubernandum* information every three years to five years; revise the forms and process as appropriate; include the sharing of summary information with the person to support his action plan.

### Train and Support

- j. Provide workshops to train formation assistants, rectors of formation houses, and novice directors.
- k. Provide workshops to orient current local superiors to the leadership program.
- l. See that superiors and formators complete the self-assessment and develop their own action plans.
- m. Offer training to others (in our works, especially) who are interested in mentoring.

### Mobilize and Implement

- n. Select personnel to offer introduction to novices, and to oversee the initial assessment and portfolio development.
- o. Put together a list of program resources (the workshops available: where, what & when — e.g., southern province leadership seminar, and JSEA); arrange them assistancy-wide and make them available (e.g., new BC Program; Villanova); continually update this list.
- p. Engage professionals outside of the Ignatian network for mentoring of men.
- q. Provide workshops for Jesuits who will serve or are serving on boards of trustees.
- r. In the provincial's annual meeting with directors of works, discuss leadership opportunities that might be available in the work for men in formation.
- s. Digest and use the most current *ad gubernandum* forms for feedback in upcoming manifestation.
- t. Set up internal structures, processes and accountabilities for monitoring the annual reviews.
- u. Annually review the implementation of the leadership formation program.

### Conclusion

These recommendations cannot be implemented over night; indeed, there is significant groundwork to be done. The task force believes that the groundwork needs to begin as soon as possible for the sake of our mission and our capacity to fulfill that mission. The task force agrees with the provincials that creating and implementing an effective program for formation “will require a strong commitment by provincials and a change in the culture of Jesuit formation.” Our hope is that we have provided a way for us to move forward to which we can all commit and that will help prepare us to better and more effectively respond to the call of Christ.

### Leadership Formation Program – Desired Competencies

ALL Jesuits will exercise formal authority - in particular those who are ordained

- by virtue of apostolic vows
- and by virtue of role (e.g., classroom teacher, pastor, administrator)

**By authority we mean:**

- the conferral of power in exchange for service to the organization.

<b>A Jesuit Leader</b>	<b>Some Suggested Activities &amp; Programs</b>
Commitment to Life-long Personal Growth through Ignatian Discernment	° Regularly participates in Retreats, Spiritual Direction, Examen, Church's Liturgy, Prayer, Spiritual Reading & Manifestation of Conscience
	° Participates in one or more Immersion Experiences
	° Engages in Apostolic Activities out of Comfort Zone
	° Reads and Appropriates Church & Society Documents
	° <i>Initiates</i> Involvement in Enrichment Programs throughout Life
	° Plans and Takes Sabbaticals with Appropriate Regularity

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Understanding of the Core Concepts and Dynamics of Leadership & Authority	° Participates in a preparatory process in Novitiate parallel the process for approval for vows (i.e., intro to leadership formation; assessment of skills; initiation of an Individual Leadership Formation Portfolio)
	° Completes a 3 credit course on leadership/authority theory
Ecclesial Skills	° Completes workshops or training programs to develop ability to give spiritual and/or retreat direction
	° Acquires Liturgical Skills, especially homiletics & public praying through courses, workshops and/or mentors
	° Participates in Interfaith and Ecumenical Experiences
	° Intentionally collaborates with and is available to the local Church
Communications Skills	° Develops appropriate expertise in communication media, information systems & teaching technologies
	° Gains competence at developing lesson plans, developing agenda, public speaking, writing a persuasive memo (e.g. through Dale Carnegie, acting classes)
	° Learns How to Articulate Vision: managing the present; envisioning the future
Social Skills	° Understands and Practices Etiquette & Protocol (i.e.. dressing appropriately, personal hygiene, table manners, introduce guests and self to others through workshop and/or mentoring)
	° Learns the Art of Hospitality (demonstrates ability to host a social gathering, carry on a social conversation)

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Management Skills	° Learns Conflict Resolution (workshops, mentoring)
	° Learns How to Set Agenda & Run an Effective Meeting
	° Skilled in Time and Resource Management; appropriate prioritization
	° Knows How to Effectively Participate in Meetings (through mentoring, feedback, doing)
	° Learns to Read a Balance Sheet; P&L statement, cash flow statement, and an audit report.
	° Learns how to Delegate, Collaborate & Consult
Disciplined Personal Habits	° Participates in Ongoing Intellectual Development
	° Regularly Seeks Feedback (from peers and supervisors) on Personal & Professional Behavior; and Discerns Appropriate Response.
	° Learns and Practices Time Management & Setting priorities (through books, workshops, mentor)
Skills in Self Care	° Develops and implements a Wellness Plan
	° Educates self in Addictions through Workshops or Other Means (e.g., alcohol, television, sex, computers, spending, food, fitness)

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<sup>1</sup>In his remarks to the provincials and their consultor-partners regarding the assistancy strategic discernment, Fr. Kolvenbach emphasized that “in the formation (of Jesuits) there should be a real stress on leadership formation because all this planning supposes, really, leaders — in the Ignatian sense of the word.”