

What Must I Do and Be

If I'm to Lead a PJP?

Paper on Formation for Canonical Governance

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6th International Conference on Catholic Educational Leadership
Sydney, 12-14 August 2013

I come to academia rather late in life. I've recently completed a doctorate. In the process, one meets people who, when you say you are studying, with genuine interest ask 'what is the topic'. When you tell them that you are researching 'formation needs for people to become members of the emerging public juridic persons in the Catholic Church', I began to note a fairly common pattern.

After their eyes had glazed over, they would request 'Say that again, slowly', to which my stock reply became 'It doesn't help'.

I am going to take a few minutes to ensure I am giving an agreed meaning of Public Juridic Persons before looking at formation needs which were identified.

Firstly, by definition, a juridic person is an entity set up by an appropriate lawful body (Lucas, Slack, & d'Apice, 2008, p. 66). That lets it buy, sell, sue and be sued.

Hence we live in a world of juridic persons. The City of Sydney is a juridic person. Telstra, Coles, David Jones are examples of juridic persons. Your RSL Club is a juridic person. All of these examples are in the civic sphere. And your role in each varies.

You can be a shareholder in Telstra and you have the right to vote at the Annual General Meeting for the appointment of the Auditor and the Directors to the Board.

You are a member of your club with those same rights at the AGM, but you also have the right to participate in the life and activities of the club.

You are a citizen in your local council area as well as state and nation and you get to vote for who will govern you.

The term juridic person was introduced into Church language in the 1983 Code of Canon Law.

Examples of juridical person defined in Canon Law include a diocese, a parish, a religious institute, a seminary.

As with civil entities, there are different kinds of relationships. I am a member of the religious institute of the Congregation of Christian Brothers. I am not a member of Chatswood parish, but I am involved in the faith life of the parish.

Where there is a significant difference between the civil and canonical worlds in the use of a word, it is in the term “public”.

A Public Juridic Person in civil society is one in which you can buy shares. In Church Law, a Public Juridic Person is one which the Church allows to be created and the resources of the PJP are seen as resources of the Church for mission. The people in the PJP steward the resources for mission.

The focus of this paper, however, is the governance of a new type of juridic person in the Church which flows from the needs revealed to continue the mission in the light of the dramatic changes in the last 50 years. The fathers at Vatican II imagined a different way of seeing Church. They did not imagine a decline in the number of religious who ran the ministries. They never imagined a lay professor of theology at a Catholic University or other than a nun in charge of a Catholic hospital or brothers and sisters running Catholic schools.

That world has changed and with it has come the need to change how the ministries are governed. Broadly, leaders of religious institutes have been handing the management of their ministries to lay people for many years and are now handing the canonical governance of them to lay people through the creation of new Public Juridic Persons with canonical responsibility for the ministries.

It has been occurring more in health ministries for about twenty years but is becoming more frequent in education as well.

For example, in Australia The Sisters of Charity have handed their Hospitals, Aged Care and Schools to the new PJP called Mary Aikenhead Ministries. It has canonical responsibility to the Church as well as civil responsibility. The Sisters have appointed several lay people to the leadership and certainly more lay people than sisters. Mary Aikenhead Ministries was approved by a Vatican dicastery.

This handover of the ministries involves the handing over of properties and revenue streams as well as the expenses to these new Church bodies for mission.

The Christian Brothers have set up with approval from the Vatican, a PJP named Edmund Rice Education Australia to take canonical responsibility for their schools.

The Good Samaritan Sisters have set up Good Samaritan Education approved by the Archbishop of Sydney.

The Brigidine Sisters have established Kildare Ministries with approval from the Vatican.

Catholic Health Care Services was established under the Bishops of New South Wales and conducts hospitals and aged care home formerly run by parishes, dioceses and religious congregations throughout NSW and Queensland.

There is also Calvary Ministries which conducts LCM Healthcare approved by the Vatican and John of God Healthcare approved by the Bishops of West Australia.

These are significant ministries in the Australian society with substantial employee numbers.

But they are dwarfed by PJPs in the USA such as Ascension Health which in 2011 employed 113,000 people and had revenue of \$US15.5 billion. Other Health PJPs employ 50 to 60 thousand people. The question it raises is “how to keep such vast entities serving the mission of the Church?”

Catholic Health East	\$US4.1 billion	54,000	Catholic Health East (2011)
Ascension Health	\$US15.5billion	113,500	Ascension Health (2011)
Trinity Health	\$US7 billion	53,000	Trinity Health (2011)
Catholic Health Initiatives	\$US10.6 billion	N/A	Catholic Health Initiatives (2011)
Covenant Health Systems	\$US547 million	N/A	Covenant Health Systems (2011)
Catholic Healthcare	\$AU44.5 million	3,454	Catholic Healthcare Limited (2011)

Hence the study to seek out formation needs. This presentation will offer some of the identified needs and very few answers.

The term formation presented a problem early on. Church documents which used the term spoke of it in terms of ‘outcomes’ and ‘fruits’ of formation. There was an assumption that everyone knew what it meant. There was no definition. So one was established as

a reflected development on one’s gifts and how the gifts contribute to the need in hand providing an holistic preparation of a person for a role – human, spiritual, intellectual, pastoral – including reflection on the experiences of their own life which might highlight some lacks in development or knowledge that are essential for that need.

The terms human, spiritual, intellectual and pastoral were drawn from two significant Church documents which had used them as the basis for a framework. These were *Pastores Dabo Vobis* by Pope John Paul II on priestly formation in 1992 and *Co-workers in the Vineyard of the Lord* on lay ecclesial formation by the Catholic Bishops’ Conference of the USA in 2005.

At the same time, Fr Charles Bouchard OP wrote a definition of formation that he used in his work of forming board members for Catholic Healthcare Systems:

“‘Formation’ is a transformative process, rooted in theology and spirituality, that connects us more deeply with God, creation and others. Through self-reflection it opens us to God’s action so that we derive meaning from the work we do, grow in awareness of our gifts, see our work as vocation and build a communal commitment to the ministry of health care.”

A survey was created from content in these two documents inviting responses as to whether the traits identified were relevant and important for future canonical governors and whether respondents saw these traits occurring currently. Baldly, the respondents agreed that the traits were important and perceived that they were not currently in evidence. In fact, 38 of the 43 items reported a statistically significant difference.

A selection of the survey items was then taken to 17 people from Australia and USA for their reflections on the data in interviews. A selection of their responses is offered here. Their responses were often lengthy and this reflected the fact that they hadn’t thought about the issue before. But their responses were rich and may assist you in your reflection about the formation needs and how they might be addressed.

Catholic Intellectual Tradition

The third Dimension was the Intellectual Dimension but I have made it the centre piece of today's presentation. The particular Survey Items reflecting the exploration of the Intellectual Dimension are 23 to 33. The factor analysis suggested that there was a commitment in particular, to the Catholic intellectual tradition. Grassl (2009) posited that the Catholic intellectual tradition exists as a style of thought, at the centre of which "one may see the principle of sacramentality – the propensity to see God in all things (St. Ignatius) and to understand specific signs as vehicles of grace" (Grassl, 2009, p. 9).

The survey items grouped around four sub themes of Catholic Intellectual Tradition. They were

"Journey to Theological Reflection";

"Relevant Background in Theology for Canonical Governance";

"Relevant Background in Theology for Ministry Implementation"; and

"Relevant Background in Canon Law for Ministry Implementation".

At the broadest reflection, some interviewees were concerned that the survey responses for the Intellectual Dimension produced the lowest number of high scores in the Desired Traits as well as the Perceived Traits compared with the Human, Spiritual and Pastoral Dimensions:

"The perception of theology is quite low. That is tricky. They did say that it is important. I do sometimes wonder how much theology to the role of governance, or juridic persons is important." (L)

"What did strike me I think that as I read it, intellectual comes out lower than everything [We might] think about this as good people with a spiritual life and a respect for the Church but with less intellectual understanding or training. That is kind of our profile for these people. It gives me a little heartburn – a lot of heartburn actually." (P)

This general concern for the low scores on the Intellectual Dimension was also reflected in the responses to particular items.

Journey into Theological Reflection

The desirability of the trait of understanding formation for ministry as a journey into theological reflection was rated very strongly by survey respondents in Item 25. However, their perception that the understanding was in evidence was rated as Very High by 16.3% of respondents and as High by 25%, giving a combined figure of 41%, less than half the figure for the equivalent items rating the desirability of this trait.

Some interviewees commented on the gap in the responses:

"Very disappointingly low for sponsors, given their background that they wouldn't see theological reflection as absolutely core to how they do their work. That says there's a need for some work on that to some extent. It's a big disconnect in my mind." (T)

“I would have expected that to be as a desired trait something higher. For many Catholics their initial formation just opens their eyes to something beyond what they knew about their faith.” (J)

The response of the interviewees supported the need for formation in theology. The interviewees also commented on other aspects of the survey results and their own experience with theological reflection and forming people for theological reflection.

Difficulty with Church Language

Some interviewees saw difficulty with Church language which may explain low levels of desired and perceived behaviour:

“There would be some governors who, to my way of thinking, would be saying, ‘well what the devil is catechesis and what is theological reflection?’” (D)

“So I’m just saying when you look at those questions that use the heavy church theological language, I would expect that they would be low.” (N)

Issues around Church language permeated this research. The major question related to what meanings of what terms do those in positions of canonical governance need to understand and perform the role effectively. In formation for canonical governance, the need for an acquaintance with the basic terms in Church meanings to undertake the governance of ministries was seen as an issue.

Understanding the Practice of Theological Reflection

There was concern to ensure that theological reflection was basic to the governance role:

“You cannot do it unless you are moderately literate in the theological reflection on the ministry.” (F)

This interviewee, in giving the rationale for the claim, linked it back to the place of the ministry in the mission of the Church:

“Because if you are running a hospital and you do not have a sense of the caring ministry of Jesus, the nature of the holistic person, how to meet the needs of people’s spirituality in the context of health care, then you are not governing a Catholic health care facility.” (F)

Personal Encounter with Theological Reflection

Interviewees spoke of the place of reflection in the canonical governance work in a particular Public Juridic Person:

“In terms of being a [governor], you are not making decisions on day to day matters. You are talking a long-term, high level milieu in which the organisation operates and I do not think you can involve yourself at that level without significant reflection.” (C)

“It’s interesting that others don’t see [theological reflection] as expressed very well but I think it should be. It also has implications for the organisations that they

sponsor, how they sell them for their executive leaders and boards and all the rest of it. How it's done and how board does it." (T)

These interviewees' responses supported the need for canonical governors to be able to engage in theological reflection in coming to their decisions.

Appreciation of Faith through Intellectual Formation

Survey respondents were asked about faith being developed through intellectual formation.

The desirability of the trait of understanding an appreciation of faith through intellectual formation was rated strongly by survey respondents in Item 33. However, their perception that the understanding was in evidence was rated as Very High by 5.43% of respondents and as High by 33.7%, giving a combined figure of 39.1%, less than half the figure for the equivalent items rating the desirability of this trait.

Some interviewees expressed concern about the place of intellectual development for the role of governance:

"In stepping back and looking at this under this category of 'intellectual' again it is saying, I think, there is a lot more education that needs to be done, or development of competencies that need to be done around canonical governance." (Z)

"If you are going to be a competent governor of a Catholic juridic person you should have more intellectual formation for the role." (G)

One interviewee linked the low results to the need within formation programs for a more significant component of the Intellectual Dimension:

"There seems to be an overall appreciation [of the desirability of] for the intellectual component, but the low perception scores would underscore the need for an understanding and intellectual component in the development programs." (P)

Place of Intellectual Engagement

Other interviewees reflected on the importance of intellectual engagement of the canonical governors:

"Again if I look at the seven people around the table, they get it that we have to be lifelong learners. And they are lifelong learners in a variety of areas." (H)

The significance was further spelt out with regard to a particular national issue at the time of the interview:

"I want everybody around that table to be reading practically everything that is coming off the press. So to me, intellectual, or going in that direction, is very important. So that is a big discrepancy it seems to me as well." (H)

This view was supported by another concerned at the discrepancy between the survey results:

"They seek to develop their appreciation of the Catholic Faith through intellectual formation – that is the part where we exchange information as well as formation and I

think they are very receptive to it. Here again it surprises me that we see it low as an expectation, as a desired trait.” (J)

Intellectual Formation

For the purpose of this study, intellectual formation was seen as a development process that involved coming to a deeper understanding of the knowledge of theology and Canon Law and how to apply the knowledge and understanding to decision making in canonical governance. If theology and Canon Law are the fields of expertise for a canonical governor, then it is important for the canonical governors to develop knowledge of these areas and their capacity to apply this knowledge in their role:

“I would hope that people who are invited to join, or who feel called to join that type of leadership, would have had a really good intellectual formation already.” (R)

“I would think it was solid, and when I say solid, what I mean is – well my expectation anyhow would be that they ... would have had some grounding, not necessarily a PhD in theology, but I would hope that they have more than the average Catholic – let me put it that way – understanding.” (R)

“I often run into problems – at least challenges – from the boards I work with because I really feel we have to introduce the laity who are in these roles to some serious theology. It is not going to be graduate level but the boards and some of the other leaders want a whole lot of reflection. They kind of get stuck at the personal reflection stage of it, which is important. So I do not know how we are going to get beyond that.” (X)

“I think there is an element of saying you have to have some basic understanding of this if you are going to serve. A CEO [may] not have a degree in finance necessarily – it might be in healthcare administration. But in health administration they probably learnt enough about finance to know what questions to ask ... but you are going to be in trouble if you are a CEO and you do not have any knowledge of finance nor think it is important.” (Z)

Interviewees supported the need for canonical governors to have an appropriate level of intellectual formation to lead the ministries. This was seen as an essential underpinning for theological reflection.

Several interviewees noted that the intellectual theological formation for the religious who had been serving as canonical governors in the past was not always adequate for the responsibility:

“Looking from the historical perspective of religious life, they did not look at these things back then, they just assumed and if you were a congregational leader you were elected because you had these abilities. But people didn’t.” (X)

“There were people serving [as canonical governors] who did not know what they did not know. It borders on somewhat of an ethical issue for me when we say that we are the responsible party for stewarding this ministry but we are not capable of doing it.” (Z)

The interviewee noted that there was a responsibility to form religious who are currently being asked to be involved as canonical governors whether in their own institute or in one of the new Public Juridic Persons:

“Sisters are not at the table just to do the opening prayer and make sure the mission piece is being powered. They also have a share of the responsibilities and have to prepare themselves and educate themselves and inform themselves about those things so they can steward to the best of their ability.” (Z)

Others reflected on the awareness of theological knowledge and concern at articulating theological ideas in public:

“We [lay people] are not terribly comfortable quoting Scripture. We are wary of being seen as unqualified preachers. We tend perhaps not to venture into that area, especially outside of our own peer group.” (A)

“I have a sense that for lay Catholics the work is often not as connected with the Scriptures as other people. I do not think that makes the work any less valuable or profound.” (E)

While the passion for involvement in the activities of healing and teaching ministries of the Church is evident, the survey results confirmed the desirability of an intellectual understanding of the religious underpinning of the actions of these ministries for the leadership and this was strongly supported by the interviewees.

Relevant Background in Theology for Canonical Governance

Some Background in Ecclesiology

The desirability of the trait of understanding the need for some background in ecclesiology was rated strongly by survey respondents in Item 27. However, their perception that the understanding was in evidence was rated as Very High by 2.17% of respondents and as High by 31.52%, giving a combined figure of 33.6%, less than half the figure for the equivalent items rating the desirability of this trait.

Some thought the term ecclesiology as not one that people would have been used to:

“These are fairly sophisticated theological concepts. Even to say to a mature lay person, who is a governor, ‘what is your ecclesiology?’ would [leave them bemused].” (D)

Interviewees took different perspectives on the issues at the heart of the survey results, though all agreed that a background in ecclesiology was important:

“You cannot be involved in governance as a canonical governor without some background in what the Church is, how the Church is structured, how the Church is governed [and] where the bits of the Church all fit together.” (F)

“You absolutely have to have a background in ecclesiology and that is a pathetic figure there of forty point two per cent who strongly agree. You have ten per cent who think you can be a canonical governor without any background in ecclesiology. It is like saying you can be a doctor without any background in medicine. It is very worrying. How can you govern a Church agency without understanding what the

Church is? It could be that the people who answered the question did not quite grasp what it meant.” (F)

“First of all the perceptions are very low. That is striking I think, very low. If I were answering this, being an ecclesiologist, I would put ecclesiology higher, as more important, because it is how we relate to the Church and what is the authority of the Church.” (V)

“I think some of the most important issues healthcare faces today are ecclesiological. Not that there are not important bioethical questions, but I think the big picture about how these ministries will be a part of the church in the future. I think those are important. So the differences here are pretty dramatic.” (X).

“The ecclesiology actually is a red flag for me. Whether we talk in the most simple way about the Avery Dulles models of the Church, I think people do have to have a sense that there are different ways to view the Church and different ways that the Church expresses itself.” (H)

“I see that as a big opportunity for growth.” (H)

This view was shared by another:

“I think if they come to governance without a strong understanding or background in ecclesiology, that to me is not something that hinders, but it is a place where we can do a lot of work. And probably there is a lot of need in our discussions to try to come to an understanding of working in that context.” (J)

There was also reflection from interviewees on how much could be expected for people to learn:

“The question is how much can you realistically expect from people who have not devoted their whole lives to this [the study of the Church]?” (X)

“People run away because it is hard work. You know, ‘I am a lawyer already, a doctor, a psychologist, a social worker and that is my professional arena. Ecclesiology belongs to the Church and I will do my best to understand what I can’.” (E)

There was a range of views on what intellectual formation in ecclesiology might entail for canonical governors. However, there was general agreement that some knowledge of Church is required to understand the purpose of ministries in the light of the mission of the Church and further that canonical governors can be expected to articulate those understandings.

Some Background in Missiology

The desirability of the trait of understanding some background in missiology the need for was rated strongly by survey respondents in Item 29. However, their perception that the understanding was in evidence was rated as Very High by 2.17% of respondents and as High by 26.09%, giving a combined figure of 28%, less than half the figure for the equivalent items rating the desirability of this trait.

The responses of interviewees reflected a level of confusion with regard to the concept of missiology.

“There are people in religious life who don’t have a grasp of what missiology is. So I think it is a fairly tall order to expect that governors, fresh on the block, will have handles on missiology.” (D)

“I would use the word mission. Missiology to me refers to what it is that people who go to foreign countries do when they embark on planting the Church in a new place.” (V)

“If by missiology we mean the mission which underpins the operation of ministry that was a big surprise for me because to me, that is critical in even recruiting these folks, orienting these folks.” (H)

“This is way more than work. It is way more than a public service, and I mean anything, health care, education, social services. It is about the mission.” (H)

“Because our understanding the mission of an organisation, the charism of an organisation, call from God and the response to call – that is all areas of attention and focus that would be right at the top of those who are preparing people, at least in our experience.” (N)

Interviewees highlighted the need for the term “missiology” to be clearly described. The responses from the interviewees indicated the need for missiology as an aspect of theology to be better understood as part of the intellectual formation for canonical governors.

Relevant Background in Theology for Ministry Implementation

The survey asked about the use of the theological sources of Scripture and Tradition in discerning the signs of the times. The underlying point was that for the ministry to be relevant to the mission of the Church, changes may need to be made in the ministry. These changes need to be made in the light of the signs of the times. This may take great courage if the perceived changes are significant.

The desirability of the trait of understanding the use of theology to help understand the signs of the times was rated strongly by survey respondents in Item 30. However, their perception that the understanding was in evidence was rated as Very High by 6.52% of respondents and as High by 28.26%, giving a combined figure of 34.7%, less than half the figure for the equivalent items rating the desirability of this trait.

Interviewees expressed concern at the low awareness rates:

“I am just so struck by how low these perceptions are.” (V)

Some interviewees linked the use of the sources of theology with the responses to theological reflection:

“I would connect that one again with the theological reflection because I think that is what this is – to understand the needs of the time in light of Scripture and Tradition. Arbuckle says that to meet the needs today is to make the leap from the Acts of the Apostles to today. To me that is theological reflection and it is asking a lot of people actually.” (H)

“From my perspective, being a theologian, [this] is the most important thing for me ... I think sometimes when I do work with the board members – there are sometimes moments when they realise how little they know about these things.” (X)

“It is that whole part of the integration. Where do you ground your thinking and your reflection that is going to lead you to action?” (J)

“We have to think this out theologically before [we act]. We are kind of putting the cart before the horse in a way. We are going to have to go back and do the theology because, in many cases, the governance structure has been set up. I think there has been some theological reflection about it but not adequate to what we are dealing with here.” (X)

The response of interviewees supported the need for canonical governors to understand and appreciate the Catholic intellectual tradition and the interplay of Scripture and Tradition as it underpins their decision making.

Relevant Background in Canon Law for Ministry Implementation

The survey asked for a response about the need for canonical governors to have some background in Canon Law. The desirability of the trait of understanding that governors needed some background in Canon Law was rated strongly by survey respondents in Item 28. However, their perception that the understanding was in evidence was rated as Very High by 2.17% of respondents and as High by 20.65%, giving a combined figure of 22.8%, much less than half the figure for the equivalent items rating the desirability of this trait.

One interviewee spoke of the need and responsibility to understand Canon Law to undertake canonical governance:

“I find that amazing. In that, certainly as a [governor], I see one of my primary responsibilities is compliance with Canon Law. You cannot comply with it unless you have a background or understanding of it.” (C)

“These organisations are part of the Church. They are as much a part of the Church as any diocese or parish and they are subject to Canon Law. It is like saying can you govern a civil company disregarding civil law and your obligations under civil law. You cannot do it. Or if you try, you put yourself at huge risk.” (C)

“I am not surprised. Who reads Canon Law? We have this requirement that people have an appreciation of and a minimum understanding of Canon Law.” (E)

“You cannot govern canonically I think unless you have a very sound understanding of the theology of the human person. This is in healthcare, and that has to be from the Catholic Tradition.” (C)

This comment was an example of the inter-relatedness of the dimensions. The governance requires a theological understanding in a manner which will also impact on the Human and Pastoral Dimensions:

Interviewees expressed concern at the lack of understanding and formation in Canon law:

“It is so poorly understood. It is almost looked upon as a barrier and a hundred and one reasons not to do this.” (A)

“The understanding of Canon law that I find amongst my colleagues as trust [governors] and directors is minimal. They cannot get their heads around the fact that they are subject to legal systems and even senior clergy struggled with the concept of a PJP.” (C)

“We found that one of our biggest challenges is actually forming the Bishops in this regard. Some of them of course are canonists and have that understanding. But those that are not – that come from different aspects, different backgrounds – I think really struggle. ... I think that they did not really have an understanding of what [the PJP] was, where it was placed and their role in relation to it.” (C)

“And the laity struggle even more.” (C)

“I think that [Canon Law] is a formation need. It is not a question of saying that ‘Canon 453-2 says this’ because that is not what it is about.” (A)

Given that the research set out to seek formation needs for canonical governance, the fact that the item on Canon Law returned the lowest score in the survey responses suggested that there was a significant need to engage canonical governors in the intellectual requirements of understanding the law and its place in the Catholic intellectual tradition.

Spiritual Dimension

The second Dimension of formation needs was Spiritual. I’ll take a little time to share the reflections on “The Sense of Vocation”. It particularly flows from Item 14.

Sense of Vocation to the Role

The desirability of the trait of understanding the sense of vocation for the role was rated very strongly by survey respondents. However, their perception that the understanding was in evidence was rated as Very High by 19.57% of respondents and as High by 42.39%, giving a combined figure of 61.9% well below the equivalent items rating the desirability of this trait.

One interviewee was concerned about the discrepancy between the ratings given to the desired and the perceived traits and referred to canonical governance as more than ordinary work, saying that it required:

“A sense of vocation to the role; that is what canonical governance is. It is not a job. It is not being on a board. It is the vocation of leading Church mission.” (F)

This response expressed a position that sees leadership of the ministries through responsibility for canonical governance as a significant involvement with the mission of the Church, and requires that canonical governors understand that it is a vocation to the ministry of governance. Other interviewees grappled with the meaning of the term “vocation”:

“When you are talking about lay people having a sense of vocation to a role, I suppose the question that I would ask is ‘define vocation’. Speaking personally it is not something I ever felt was a vocation because I do not understand what that word means for me.” (A)

“This is another area that I think is worth pursuing in the formation of governors because, I think the notion of vocation is very poorly understood.” (D)

Interviewees further commented that one of the issues in the area of vocation was that the word itself had come to be associated exclusively with ordained ministry or religious life:

“We have, for so many years, narrowed the concept of vocation so that our lay colleagues might not tend to see this [canonical governance] as a vocation, certainly some kind of call.” (J)

“I think there is a belief out there in the Catholic population that vocations are, or vocation is, about priesthood and religious life first.” (D)

On the other hand, interviewees also recognised that there is a growing awareness and understanding that vocation is a call to a particular ministry (Casey, 2010, p. 149; Hahnenberg, 2010, p. 72):

“There is a growing awareness that every Christian has a vocation.” (D)

Interviewees commented on how this awareness of vocation might be expressed and developed:

“I do not think that is the first thing that comes to mind when we talk to people who might be interested in serving in this way [as canonical governors], which goes to that next one which talks about vocation to the role. But I think it is growing in people.” (H)

Another spoke of the impact of introducing people to the relevance of the concept of vocation:

“When you tell them it is a whole vocation to the ministry of [canonical governance], sometimes that amazes them. They say well I do not know if I could do that, because of their understanding of the word vocation.” (J)

“Vocation to the role ... is a learned response that might not be there depending upon what formation people have been exposed to....People [need to] be helped to see the vocation that is there.” (L)

Other interviewees spoke of the growth of the awareness of vocation:

“There would be conversations something like that, but they would definitely not have language around vocation ... and they may or may not develop it.” (E)

“I think sometimes they get involved in the experience then they think or realise that it is a call.” (R)

Some interviewees volunteered what a definition of vocation might be:

“Vocation means being united to the Word of God. I think it is just a question of getting lay people to see that this is a much more serious commitment and a deeper reality than maybe they were aware.” (X)

“Vocation is a choice we each make to live the Gospel in a loving and creative way. Vocation is about how do I best express the love in my heart in an integrated and authentic way, in a way that keeps me integrated and is authentic to me and is credible to people out there.” (D)

The interviewee saw that the role of canonical governor was a vocation for a responsibility in a ministry in the Church:

“Is being a canonical governor part of one’s vocation? Yes, without a doubt. It is an invitation offered by a congregation ... and it is response by people saying yes, this is how I can express my gifts in a way that are true to me and this is how I can express part of the love of my life.” (D)

In a similar vein, interviewees spoke of the personal experience of the development or awareness of vocation in their own life as canonical governors:

“Did I hear a voice calling in the night? No. I gradually grew into doing what I now do. It was not by accident, it was by choice. But I did not have any moment when I thought I have to do this – if that is what a vocation means.” (A)

“Yes it does shape my life. I would explain my reasons for doing it as...I think this is enormously important work for the church and for whatever part I can play in that, if that does make even the slightest difference, that is a good enough reason for me to do it.” (A)

“This is not an intellectual thing, being a canonical governor. There is kind of a lot of other stuff in there. So unless you feel that well, there is something here you kind of have been called to do. That is what vocation is.” (I)

“Part of the vocation for me was married life, a certain business life and a church life. Part of it was because there were skills in my business life that were helpful and used in the church life. There became interdependency in that – okay you were doing it because it was tied in with so many other things aligned to church life.” (I)

One spoke of the journey to vocation of a member of their ministry:

“One member said on leaving after a number of years: ‘In retrospect I was called to it, but at the time I did it because I thought it was an important thing to do’.” (E)

Others downplayed the importance of “coming into the role”:

“Certainly the intention is there but a vocation to the role? Whilst in an ideal world I might think that people should have [a clear sense of their vocation] and that is what we would see, a number of people coming in would not think they have that. They might have it later.” (E)

There was an affirmation among interviewees that the development of vocation was part of a life journey:

“Generally they will say at the end [of their appointment] ‘this has been one of the most important journeys for the revisioning of my faith’.” (E)

For some interviewees it had been a very personal experience which they shared or had been shared by those with whom they were involved:

“So in my role I have a strong sense that for, call it providence or whatever else, opportunities have come my way to do certain things and use some of the skills that I have in one sense, but also my person to be involved in stuff at different times. The way this particular canonical governance opportunity arose as well, it is there, there is

a certain amount of providence in it, so you kind of take it. For me personally it is high.” (I)

Another interviewee spoke of the journey of a confrere:

“One member said ‘I accept this invitation and this offer with joy because this is a redemptive experience for me’. She is the only one that said that but I think the others may have felt it. But I have not asked them.” (E)

One interviewee touched on the point that an implication for engaging with the vocation was that it was not a short-term exercise in life:

“If this is a vocation then you are in this for the long haul, and individually.” (T)

However, an interviewee reported that the outcome of the involvement in ministry leadership is not always the development of a spiritual vocation:

“One of them in particular would have said at the end ‘I am not a theologian. I never planned to be a theologian. I have contributed nothing theologically to this organisation at all. My profession is medicine and my contribution has been that.’ And brilliant he was. We could not have done without him. So at the beginning and the end [there was] no sense of vocation, no sense of redemption, no sense of formation. But we held him.” (E)

Interviewees reflected deeply on the matter of vocation to the role. Their reflections support the understanding that there is a growing awareness in people involved in canonical governance that the process usually involves something other than a career.

Pastoral Dimension

Developing and Sustaining Catholic Identity

The desirability of the trait of understanding the awareness for responsibility for Catholic identity was rated very strongly by survey respondents in Item 35. However, their perception that the understanding was in evidence was rated as Very High by 32.61% of respondents and as High by 43.48%, giving a combined figure of 76%.

Subsequent interviews elaborated that, in fact, simply understanding Catholic Identity was not in itself sufficient and that persons in positions of PJP governance should also be participants in the Catholic Church and know the tradition of Catholic Church:

“If you are not prepared to sign-up to the Catholic Church, well how can you be a steward of the Catholic Church?” (I)

Several interviewees reflected from their own organisational experience at canonical governance and board level. One outlined the systems in place to ensure that the Catholic identity was a central consideration in the leading and operation of the ministry:

“To give a practical example, our board committee [structure] for the health system – we have a committee for clinical quality; a committee for finances; a committee for strategy; we have a committee for mission and governance. So it is parallel.” (V)

“For us, we continually refer to the fact that we are at a particular place within the Church; so ‘within the Church’ is important to us, and it is ‘big C’ [institutional] Church which you have there too.”(I)

This positive view was attributed to the impact of the Religious Institutes and their commitment to Catholic identity.

“We are fortunate in that, our big secondary schools, when you have a Loreto tradition, or a Christian Brothers’, or a Marist Brothers’ tradition, the school is affected by that. Everyone is aware of it. They are continually reminded of it.” (G)

However, the interviewee expressed concern at maintaining the Catholic identity in Catholic secondary colleges where there either never had been the involvement of a religious teaching institute, or the link had been lost:

“In a Catholic college it is not nearly as easy to do that.” (G)

The implication was that it is more difficult for Catholic laity to lead Catholic secondary schools and maintain Catholic identity in systemic settings where there had been no previous involvement of Religious Institutes. However, the interviewee was speaking of the operational level of the ministry. This research focussed on the needs for the canonical governors whose task it is to oversee the ministry. It raised the question of how to ensure that those at the operational level (teachers, nurses, managers, principals,) and those at governance level understand “Catholic identity” and take responsibility for nurturing it.

Another interviewee expressed the difficulty of ensuring that the basics of mission were addressed:

“The demands of organisational governance now are so huge, unbelievably huge that to distract people, which is what it feels like very often, with the requirements for thoughtfulness about missiology or thoughtfulness about ecclesiology is almost like – it is too hard for them.” (E)

A number of the interviewees spoke from their experience of their own ministries. One spoke of how the organisation articulated the relationship between planning and action and the values of mission which underpinned it:

“My experience is that in this organisation we have a framework which every significant decision has to run past. And it is all directed to missiology.” (C)

“If you are doing any strategic planning then you have to be looking at the signs of the times. Again I think that it is not just the sign of the times for the mission of the Church but it is the signs of the times in the world in which we live.” (N)

Discerning the signs of the times in light of the world in which we live is at the heart of the mission. The message comes from the Founder, Jesus Christ, who instructed his disciples to take the healing and teaching message of the good news of the Kingdom of God to the whole world (Mk 16:15, Mt 28:19).

Understanding Mission

The issue of canonical governors seeing “mission” as the mission of the ministry rather than the ministry being an expression of the mission of the Church was raised by two interviewees:

“The thing that I would wonder about is, [whether] they do it about mission for the Church or for their own mission. And I don’t know the answer to that.” (R)

“I believe that we have formed [canonical governors] for the mission of the health system. Continuing to put that in the context of the mission of the Church is the challenge. I think we have language that does it, but [I don’t know] whether we have formed people enough for the big mission of the Church.” (H)

These concerns were of major importance to this research. The question has been asked about the preparation of people for the canonical governance for Church mission. This suggested that failure to understand the Church mission meant the point may well be being missed in the enthusiasm of people to help in the Church ministries.

This concern regarding action without appropriate background knowledge and appreciation of the deeper purpose of agencies was reflected upon by interviewees in the matter of the intellectual gifts needed to discern the signs of the times appropriately.

Adult Education Approach to Formation

Connolly’s (2002) research on elements of canonical governance formation showed that the approach needed to be based on the principles of adult education. Such principles include that the formation programs acknowledge background knowledge and experiences in previous and current roles.

In their reflections about the range of formation programs, interviewees emphasised that approaches needed to be based on the principles of adult education. For example:

“Many people who are moving into a canonical governance role have a skill set in one area and there is a learning process in the other. There are some areas that when you look at a whole organisation they may have more work to do in one area versus another.” (N)

An interviewee made the point that part of the acceptance of adult education is the realisation that the person may have developed a particular spirituality without the usually accepted language that is used in the field:

“I think that it has to be different in terms of lay people. There has to be some points of focus that take account of the fact that grace works in their lives within the relationships that are central to their own lives rather than in the community that they become part of in the ministerial work of governance.” (L)

“It is not unimportant that community. But you cannot conflate the points of emphasis of religious life and the points of emphasis of lay life.” (L)

Interviewee L spelt out some understandings that might flow from engagement with people on their own spiritual journey as they prepare for a role in canonical governance:

“It is still an area that needs exploration and some of the main points of people coming to a certain trust of their own spirituality, that God has indeed called you as you are, and to grow further as you are. But as you are as a married person, as a family member, as a single person, as a member of the community in which you live, the town. That is the stuff of the life of a person.” (L)

The interviewee reflected on the change that was being effected for lay students preparing for activity in pastoral roles:

I think that the new [thinking] invites us to think about the very world we live in. And the teachings of the Vatican Council about God’s presence in all things, invites us to think that way. The fact of lay people, not people living in convents and rectories but people living in the world, the fact of that contributes to this and can lead to a greater discovery of God’s presence in all things.” (L)

The engagement with adult education methods and processes became an essential element in formation for canonical governors.

While the interviewees spoke of the tensions around relationships with Bishops, there was respect for the role of the Bishop in coordinating the ministries of the diocese, concern for the vast responsibility of the Bishop and awareness that the new canonical oversight of the ministries required a different understanding of governance by all parties. This research indicated that this is seen as a significant aspect of formation for canonical governors, including Bishops.

The research looked to the formation for canonical governors for Catholic ministries. But if Catholic Identity is to be more than a brand in universities and schools, the formation needs identified have a place for senates, boards and senior staff. How is one formed to be a Professor of Education in a Catholic University? What has been assumed or taken for granted? Can it be taken for granted in the future?