



Discernment and Apostolic Planning

Apostolic Planning for Renewal and Transformation

*Apostolic Planning: A Path of Renewal and Hope**

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It is a great pleasure to be here with you this afternoon to reflect with you on Apostolic Planning and how it is being lived as a path of renewal of our life-mission and a source of hope in the different Units of the Society of Jesus. My wish is that these shared reflections may guide our steps on the journey of conversion, following the inspiration of the Holy Spirit. I thank each of you for your presence these days here in Rome and your willingness to share your accumulated experience and wisdom, learning from one another for the benefit of all.

A key point I want to make at the outset is that every apostolic planning process offers an opportunity for renewal. Each apostolic unit, Region, Province or Conference of Major Superiors can seize that opportunity for renewal which, in turn, becomes a contribution to the renewal of the whole body of the Society of Jesus. To see planning as an opportunity for renewal, overcoming the temptation to conceive it as an administrative requirement imposed from above, is the way to motivate the demanding process that it requires, to carry it out with energy and to put it into practice with the passion that allows it to become an instrument of change and renewal of our life-mission.

We are at a crucial moment in the life of the Church and the Society of Jesus. In the eleventh year of Francis' pontificate, the synodal process seeks to incarnate the orientations of the Second Vatican Council in the changing times in which we live. GC 36 set a challenging horizon for the Society of Jesus; that horizon got concretised in the Universal Apostolic Preferences which were received as a mission from the Holy Father and which run from 2019-2029. We took advantage of the Ignatian Year 2021-2022 to bring to mind the radicality to which our vocation call us. The 71st Congregation of Procurators was the occasion for a serene examination of the *State of the Society*. I invite you to see all these years from the perspective of the word *process*.

* Translated from *Spanish*.

What characterises all the period lived by the Society since Vatican II is a complex process of renewal – of conversion – in order to be creatively faithful to the charism received for the benefit of the mission of the Church and the contribution to the reconciliation of human beings with each other, with the environment and with God.

Apostolic Planning has been one of the most important instruments in this process. We have been learning to use it as a tool for discernment at all levels of our life and mission. Since GC 36, in addition to the regional, provincial or apostolic area processes, we have experienced processes that involve the whole universal body of the Society. Let me recall the discernment of the Universal Apostolic Preferences; the discernment on the current meaning of the vow of poverty (associated with the renewal of the Statutes and the Instruction for Administration and Finance); the processes carried out and underway for the restructuring of provinces and forms of government to make our missionary commitment more agile; the long process of preparation, implementation and assimilation of the examination *De Statu Societatis* on the occasion of the 71st Congregation of Procurators (2023).

This complex process – which in fact is made up of different simultaneous processes – is leading us to respond to the insistent call to the conversion that is necessary for the authentic renewal of each one of us, of the apostolic works, the Jesuit communities, the regions, provinces, networks... in short, the renewal of the Society to make it a better servant of the Lord's mission within the community of followers, of the People of God which is the Church. We are moving forward step by step... which is a source of consolation for me and, I hope, for you too.

Resources for an epochal change

Real, deep and lasting change depends more on the process than on the “product” itself, or rather on the result achieved. I am convinced that if the right process is in place, people will engage in it and the result will be in line with expectations. For us, the key to a proper process is that it is effectively grounded in a deep and living relationship with the Holy Spirit. We aim for spiritual processes rather than just organisational or administrative improvements – which of course are also necessary.

What I want to underline is that if you are in charge of processes of realising or implementing apostolic plans at any level of the Society, you are called to guide them by ensuring the prayerful dimension and guaranteeing the space for spiritual communication. We are not a company or an NGO but an apostolic body that plans

spiritually and not only managerially. As an organisation, we want to be instruments of God's action in history in the same way the Holy Spirit inspired Ignatius of Loyola and the first companions. This is the charism we have received and we need to renew it in our life-mission also through discerned apostolic planning.

Here at the General Curia, to assist the apostolic planning processes in various places, we have been working closely with Dr Christina Kheng who is with us these days. This afternoon we will present her new book on pastoral planning. She manages to combine, in an original way, insights from managerial forms of planning with Ignatian charismatic inspiration. It gives me great pleasure to recognise how she has achieved a genuine integration and not simply put Ignatian labels, as a kind of make-up, on the planning processes. Thank you, Christina!

In addition, the General Councillor for Discernment and Apostolic Planning, Fr John Dardis, and his team have developed a website that brings together useful resources for those who are in charge of apostolic planning processes. There you can find videos and other materials from this meeting to share with your local teams.

Universal Apostolic Preferences 2019-2029

The UAPs are the central template of apostolic planning at all levels of the Society of Jesus in these years. I remind you that they are, first of all, calls to conversion or, better, key dimensions of the conversion to which we are called as Society of Jesus.

A first call is to stop working sectorally. Often sectors have become silos that store resources and use them without any connection to each other. By acting in this way we lose energy, we do not make good use of the always scarce resources we have and we miss opportunities to live and work in the tension of the Ignatian *magis*. I insist, we are called to overcome the sectorialised vision and action through a living of the mission that integrates its various dimensions and allows the effective contribution of each apostolate to it.

Among the possible examples to illustrate this call to apostolic integration is the organisation into "platforms" adopted by the Province of Spain. In those territories where different apostolic works have traditionally functioned, doing good work, but with little knowledge of each other and little collaboration, the platform seeks to bring them into communication based on the common discernment of the Jesuits and mission partners responsible for the different works, seeking the best possible service to the people they serve in each locality. Gradually the walls between apostolic works

have crumbled. Gradually a community of apostolic discernment has been built up. Gradually, the *willingness* of persons and works to make themselves freely available to enhance the common mission has grown. It is not a matter of diminishing the strong, passionate commitment to the apostolate to which each person has been sent. We need this commitment and this passion as a form of total dedication; but it must be lived, however, with the freedom that comes from the detachment proper to the charism we share. Here we find delicate polarities and tensions to be appropriately maintained. Often, apostolic planning processes come up against apostolates that are seen as ‘untouchables’... which become obstacles to moving forward into the future. And so, we associate conversion with discernment and apostolic planning.

A second conversion called for by the UAP is to movement. As a result of the common discernment of the Jesuit body, the wording that was sent to the Holy Father deliberately uses verbs of movement. The first UAP is not “spirituality”, but *showing the way to God*. The second is not “the poor” but to *walk with the poor and the excluded*. The third is not “the young” but *accompanying young people towards a future full of hope*. And the fourth is not “ecology” but *collaborating in the care of our common home*. It is a strong invitation to regain the agility we need to get moving and to accompany effectively the rapid changes of today’s world. The post-conciliar General Congregations have tried to put the Society in permanent movement. The processes of apostolic planning are a precious instrument to maintain the agility and movement that allow us to keep up with the rhythm of the Holy Spirit.

The third conversion to which the UAP calls us is to convert to the Holy Spirit who, as we recite in the creed, is the *Lord and giver of Life*. We need to ask ourselves honestly if we believe in the Holy Spirit as the one who guides our steps, our processes of apostolic planning. The GC was keen to remind us that the Society of Jesus is totally dependent on the Holy Spirit. If we do not allow the Lord to act in us and through us, the Society walks aimlessly and builds on sand, without the solid foundation that He alone is.

With the emphasis there, GC 36 passed on its own experience to the Society. During its deliberations, it found itself bogged down in the discussion of ideas and documents. Only when it decided to slow down, to make room for personal and common prayer, to appeal to spiritual conversation in order to share the motions that were the fruits of prayer and not just ideas... did it find the way to reach consensus and consolation. This is why we insist on linking apostolic planning with discernment and insist on using spiritual conversation as an appropriate method to facilitate processes guided by the Holy Spirit. It must also be said that, depending on people,

times and places, it is necessary to devise methods of apostolic planning inspired by discernment that are able to actively include companions of other faiths or who do not practise any religion.

In the past some have argued that discernment in common is not part of the tradition of the Society of Jesus. I disagree. Discernment in common finds its roots in our first Fathers meeting in Venice (1537). Unable to embark for the Holy Land, they discerned in common whether they should remain together and whether they should be united by a vow of obedience. Common discernment in the Society of Jesus respects its way of proceeding and its hierarchical structure. Superiors are called to make decisions using discernment in common with their communities. The Directors of Apostolic Works with their work teams, including with those who profess other Christian confessions, other religious creeds or are non-believers. Indeed, common discernment is possible in non-Catholic contexts with the appropriate adaptation of how it is carried out.

In short, discernment is intrinsically part of the apostolic planning processes of the Society of Jesus. Listening to the Holy Spirit is a priority in any apostolic planning process. This means that we need to learn and practice forms of discernment in common *adapted* to the particular conditions in which we make apostolic decisions, without being tempted to label any method we put into practice as discernment. What is fundamental is listening to the Spirit. Apostolic planning puts flesh on the inspiration of the Spirit.

The UAP also invite us to convert one another. You have always heard me speak of uniting life and mission in a single expression. I am deeply convinced that our life and the mission to which we give ourselves are totally intertwined with each other. To separate one from the other or to put more emphasis on one than the other creates problems. Forty or fifty years ago we lived through turbulent times precisely because that intimate relationship was lost; in some cases this produced various kinds of imbalance, for example, towards activism or spiritualism. In the times in which we live, there are also external and internal pressures that can lead to imbalance. Apostolic planning is a key instrument to restore balance, if that is necessary, and to maintain the creative tensions necessary to incarnate a life-mission style in accordance with the charism received.

It is true that we need to continue to be converted to the faith that is committed to the struggle for social justice, as GC 32 asked us to do; we need to be converted to interreligious, intercultural and intergenerational dialogue, as GCs 33 to 35 insist, and

also to collaboration, as GC 34 insists. At the same time, from GC 31, there has been strong insistence on spiritual depth and on making community life a mission and witness of fraternity. We can honestly recognise that in seeking to respond to intense and complex changes we have lost our balance, sometimes unnecessarily.

At this time, we are aware of the urgency to keep moving in response to the demands of the changing times, while maintaining the tensions inherent in the life-mission balance of our vocation. Therefore, apostolic planning cannot only look at what we *do*; it must drink at the source of who *we are*. We are not only *human-doers* but *human beings*. Here there is a strong call to give oxygen to the vital dimensions that need time and space to breathe at the top of their lungs. The overwork of so many Jesuits and companions in mission has had catastrophic results for the required spiritual depth, community or family life and the necessary fraternal and gratuitous social relationships... The result has been “burnt out” people who have lost enthusiasm and creativity, who live in spiritual desolation and carry out their work by inertia and whose human relationships have become fragmented. In short, this work overload opens space for what Ignatius calls the *bad spirit* – we can say it is the work of the bad spirit – which only hinders the following of the Holy Spirit.

When we give in to the temptation of activism – always present – we open the door to a *bad spirit* that will lead to divisions among us; we can quite easily find its roots in tiredness or because we do not have time to communicate to each other the situation in which we find ourselves. It is therefore of primary importance to recover the rhythms of life and work that invite us to grow as Jesuits or as people who share the mission; spaces for human, spiritual and intellectual growth.

Combating work overload is one of the tasks of those who take responsibility for apostolic planning. Doing so means, everywhere, making difficult decisions, leaving some apostolates or changing the way we are in them. Apostolic planning done in a discerning way is an effective help to overcome work overload and to find a restored life-mission balance in communities and teams, to find joy, consolation and happiness even in the midst of complex, socially tense and demanding situations. Moreover, it will be a way to attract vocations to the Society and authentic companions in mission.

Let me add one last dimension of the complex conversion to which the UAP call us. It is a conversion to apostolic planning itself. If we do not plan, if we insist on doing everything, without setting real priorities or if we set so many priorities that in the end there are no real priorities... we will end up “burnt out” or frustrated. We

cannot hide the enormous difficulty we have in making choices, in making clear decisions, especially when it comes to apostolates with a long tradition over a period of time or in the province. From an authentic Ignatian experience we can expect no less. Ignatius transmitted a charism and an experience that leads us to choose, to make decisions aiming at the *magis*, at the best service, at the greatest good. However, we resist... only with the help of the Lord's grace will we be able to face the discerned choices by which the Society can best contribute to the *greater glory of God*. You, as those responsible for apostolic planning in your Conferences/Provinces/Regions can contribute with your leadership to enthuse and accompany planning processes as spiritual experiences.

An important aspect of apostolic planning efforts is to help overcome the fragmentation of our work in various apostolic areas. For example, there are numerous study groups, research centres and social centres under our responsibility, but they often work in isolation. In this way, we are not taking advantage of the enormous potential we have or making the best use of the resources available. The Apostolic Secretaries in the General Curia (Higher Education, Primary and Secondary Education, Service of Faith and Social Justice and Ecology) are promoting networking as a way of taking advantage of potential synergies between our apostolic works. But it is not enough. Therefore, I would like to encourage you, as those responsible for apostolic planning, to have as a key objective of these processes the convergence in common foci of interest that will make it possible to establish synergies and make better use of the resources at our disposal. Questions such as, for example, our contribution to the care of our common home... dialogue with Islam and other religions... War and peace... Secularism... the future of democracy in the world... the challenges of Artificial Intelligence for Jesuit education... etc. All of them, and so many other relevant issues on which some individuals, centres or universities are already working. By harnessing the capacity of our institutions, we can improve the quality of our contribution. If we remain fragmented, we will not achieve what our *magis* tension demands. This requires growing in inter-provincial and inter-conference collaboration. You and the Apostolic Secretaries can join forces in this direction.

Allow me a special reflection for those of you who plan in contexts where we are suffering from Jesuit downsizing. Please do not shrink your vision. We need a vision that is broad, bold, creative... Keep this kind of vision alive and well nourished. Don't let the pessimism derived from smaller numbers lead to shrinking and narrowing the vision. Problems about the number of Jesuits and scarce resources have always existed, in various ways since the time of Ignatius himself. Sometimes we

imagine an illusory history in which we see a prestigious, numerous Society with powerful institutions. Our imagination distorts history. What is true is that there were times when the Society was dangerously tempted to be self-sufficient and self-referential.

The call we hear is to experience our present situation as a *kairos*, the now in which the Spirit leads us to a greater closeness to the Lord in order to follow him more closely in his mission of reconciliation in a world thirsting for it. Our apostolic works will be instruments at the service of the Gospel to the extent that closeness to the Lord nourishes our vision, to the extent that we revive the charism and grow in the capacity to incarnate it according to the times we live in, the places we are in and the people we are.

Collaboration

A few words on the importance of collaboration in the life of the Society of Jesus today. As I get to know the places where the Society carries out its life and mission, I find an immense and rich variety of forms of collaboration. Going deeper, I find different conceptions or mental models of what it means. A first step, therefore, is to know and recognise the different conceptions we have of collaboration and the mental models that develop from them.

A conception that is still very much present in different parties and people is that collaboration is an emergency measure. This mental model understands that we turn to collaborators when we run out of Jesuits or when Jesuits have run out of steam. At the opposite extreme we find a conception that assumes complete equality between Jesuits and those who share apostolates – apostolates in which we are simply mixed together in a kind of indiscriminate way. This conception fails to recognise the different vocations within the same mission: Jesuit, lay, religious, diocesan.

The presence of different mental models of collaboration is causing confusion among many people, especially among young Jesuits. The question of one's own identity and the possibilities of sharing charism and mission in different ways of life is coming up strongly.

The proposal I make to you is to move towards a conception of collaboration that starts from the recognition of and respect for particular vocations within the People of God and humanity. Since the time of the early Church, the image of the body has been used to describe it. A body made up of very different organs, each

contributing to its own existence. No organ can tell others that it does not need them (1 Cor 12, 12-27). The Society of Jesus, too, from its beginnings has used the image of the universal body to point out the unity in the differences of mission, places and persons. Forming the same body in mission, made up of people who respond to different vocations or, better, to different *states of life*, and at the same time contributing to the mission of the Church through the apostolates born of the charism of the Society of Jesus, can open us to understand the richness and enormous potential of collaboration in mission as a characteristic of the Society of Jesus today. It can also help to confirm the identity of each of its members, as well as of the apostolic works.

We have a long way to go to develop a broader and deeper understanding of partnership and to put it into practice. I ask you to reflect on this and to ensure in ongoing apostolic planning processes that there is an understanding of what we are talking about when we refer to partnership.

Another point of singular importance when we refer to collaboration is the challenge represented by the formation of those who, from different vocations, collaborate in the apostolate of the Society, becoming companions (partners) in mission. We are faced with a striking disproportion between the effort and resources invested in the formation of Jesuits and in the formation of partners in mission.

For Jesuits there is a long tradition, accompanied by the provision of resources and programmes. For those to be ordained as priests there are also the guidelines of the Church. Yet along with this, I can still say that Jesuit formation faces enormous challenges in ensuring sufficient formation in the various fields of Jesuit apostolate to respond to the changes underway in the world. Education, social justice engagement, scientific research, spiritual accompaniment and pastoral work all require new skills and tools to be acquired during formation.

As far as the formation of co-workers is concerned, I am aware that there are programmes for co-workers in some Provinces. I can mention Karnataka in India; I can mention the US Provinces; I can mention Spain. Also networks like *Fe y Alegría* or JRS offer formation programmes. However, we are still far from a consistent set of formation programmes for companions in mission that responds to a shared vision of what collaboration means. While deepening the concept itself and achieving a common horizon, we can take some steps such as sharing best practices that exist in the Provinces and Regions, creating a data base at the General Curia with links to available resources for the formation of collaborators. This meeting is an occasion to ask those responsible for apostolic planning at all levels of the Society of Jesus to

include in their discernment and apostolic plans the formation of companions in mission as well as reflection on how to improve the formation of Jesuits.

Vocations

The promotion of vocations, brothers and priests, to the Society of Jesus is an indispensable priority in any apostolic plan. Vocation promotion is an integral part of our life-mission, therefore, it is not a matter of having a parallel plan to the apostolic plan of the Conference/Province/Region/Apostolic Work. It is a dimension in which every member of the body can and must participate if we truly believe that the Society has a future and we want to play our part in responding to what the Lord asks of us.

Let's let go of the reins

If we truly believe that it is not in our hands to chart the way, but that we open ourselves to be guided by the Lord whom we follow as disciples, we need *indifference*, the fruit of detachment that leads to total availability. We follow Jesus who did not cling to the privileges of his divine condition, but accepted to become one more and to carry out the saving will of the Father by willingly accepting the cross that opened the doors to the risen life (Philippians 2, 5-11).

From this basic condition we take it for granted that processes require time – a length of time that is not always possible to foresee at the beginning of the process. Processes involve extensive consultation and these may require a variety of rhythms. If done well, a process creates feelings of consolation and generates apostolic energy for Jesuits and mission partners to explore new and exciting horizons.

Moreover, a process guided by the Holy Spirit has an inevitable dimension of surprise. During the meeting Sister Jolanta Kafka will share the experience of being surprised by the Spirit as a key element of discerned apostolic planning. Pope Francis has reminded us on several occasions that if everything is planned and nothing escapes our 'control'... then something is wrong. Let us examine how much space we are leaving to the surprising action of the Holy Spirit. Are we really open to the unexpected?

The Holy Spirit often acts in surprising ways. What does this mean? On the one hand, it can mean that you don't automatically dismiss the voice of the minority in your discernment, which may be the voice of God. Don't dismiss an idea that may

seem a little extreme: it may be the one that the Holy Spirit is nudging us to embrace. The Pope uses the word *squillibrato*, which means “off balanced”. We don’t like to feel off balance. But sometimes the Holy Spirit unbalances us in order to push us to change.

At the end of this long presentation I ask that the Apostolic Plan that comes out of the processes that you lead and accompany offers vision, agility and passion... I also ask that it be realistic because it must take into account the concrete people, the places where you work and the times in which you live. I ask you to keep the tensions between creative vision and realism; between dreaming and down-to-earthness finely tuned. You can do it... with the help of the grace that is not lacking and is sufficient for us.

With so many crises around us – Ukraine-Russia; Palestine-Israel; in Africa, my own country Venezuela – we can see an enormous need for reconciliation and justice. In the midst of what can be bleak, what consoles me is that this need for reconciliation and justice is exactly the mission of the Society that has been confirmed again and again since the Second Vatican Council until today.

A thousand thanks for your patience and for the help you give so that this *small collaborating Society of Jesus* can make the best possible contribution to the evangelising mission of a Church that is becoming synodal, the People of God walking together, pointing the way to the reconciliation of all things in Christ.

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