GOOD INSTRUMENTS:

ORGANISATION DEVELOPMENT FOR THE RENEWAL OF MINISTRIES

David Coghlan, S.J.

Philip Harnett, SJ, 1943-1996

Philip Harnett was President of the Conference of European Provincials at the time of his untimely death on 20th December 1996 at the age of 53. He had previously been Provincial of the Irish Province from 1986 to 1992. When he became President of the Conference of European Provincials he saw the value of bringing organisation development to the Society in Europe. He set up a task force of the conference, EJOD (**E**uropean **J**esuits in **O**rganisation **D**evelopment). This book is an outcome of that initiative.

Philip was an energetic and visionary man. He saw the potential of bringing the insights of the organisational sciences to the processes of the Society and worked actively at making that happen. While his death leaves a personal gap in the lives of all who knew him, his initiatives are a legacy to be followed. This little book is dedicated to him.

LIST OF ABBREVIATIONS

CONS	*The Constitutions of the Society of Jesus and Their Complementary Norms*
CN	*The Constitutions of the Society of Jesus and Their Complementary Norms*
GC 31	*Documents of the Thirty-first and Thirty-second General Congregations of the Society of Jesus*
GC 32	*Documents of the Thirty-first and Thirty-second General Congregations of the Society of Jesus*
GC 33	*Documents of the Thirty-third General Congregation of the Society of Jesus*
GC 34	*Documents of the Thirty-fourth General Congregation of the Society of Jesus*
SpEx	*The Spiritual Exercises of St. Ignatius*
GP	*Guidelines for Provincials*, Society of Jesus: Rome, 1979

Renewing Apostolic Religious Life, David Coghlan, SJ Columba: Dublin, 1997

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FOREWORD

I entered the Society in 1966 and through my years in formation, during the period Vatican II and Thirty-first General Congregation, I was caught up in a massive change process. Within formation we were experimenting with different forms of community. We were reading lots of documentation and attending meetings about the renewal of the Society and the province's ministries. To me as someone young and new in the Society this was exciting and something to take for granted. Yet around me were Jesuits objecting to the changes, bemoaning the destruction of the Society and the ruin of the Church. I began to realise that change was a complex thing, that what appeared to me to be an obvious and good thing to do did not appear so for others. Thirty years later my insight still stands true.

Over the past thirty years, we have brought the fruit of academic research and professional practice in the human sciences to bear on ignatian spirituality and the life of the Society. We benefited community living from group dynamics and spiritual direction from psychotherapy and counselling psychology, to name two examples. However, we have not yet applied the applied behavioural science of organisation development to Jesuit apostolic renewal to any significant extent.

Organisation development is essentially an applied behavioural science approach to managing organisational change which places its core emphasis on helping the members of organisation manage their own change and learn from the experience. From my perspective and experience as a Jesuit formed in the tradition of the *Spiritual Exercises* and the *Constitutions*, and as a teacher and practitioner

organisation development, I have seen clearly that our ignatian tradition actually contains many organisation development processes. I think that we need to develop a spirituality of organisational renewal and have frameworks for understanding it, just as we have developed constructs for individual renewal and change. So an organisation development perspective can be a help to provincials and those concerned with the renewal of the Society. In the words of the Introductory Decree of GC 34, "We can and should be good instruments revitalising our lives and renewing our ministries. "(#14)

This book is aimed for anyone in the ignatian tradition, whether Jesuit, member of the ignatian family of religious congregations, member of an ignatian organisation such as CLC, Jesuit Refugee Service, or lay person working in an ignatian manner. Within this general readership, provincials, congregational leaders and directors of works will find it a considerable benefit in their leadership roles of renewal and change. And many who work as consultants and facilitators will find this ignatian approach to organisation development useful.

Acknowledgements

There is a great deal I have learned from the "grandmasters" of organisation development, in particular Richard Beckhard and my mentor and friend, Edgar Schein. Their influence permeates the text and specific references to their work are provided where appropriate.

The emergence of this book in print is the fruit of a great deal of support by many people over a considerable period of time. Philip Harnett initially introduced me to organisation development, and then later as Irish provincial missioned me into putting theory into practice. Joe Dargan and Laurence Murphy, in their respective terms as provincial, challenged me to integrate ignatian spirituality with our joint efforts at creating a strategic plan for the Irish province. I particularly thank those who took the time to read drafts of this text and give very valuable comments - Joe Dargan, Tim Hamilton, Tom McGrath, Brian O'Leary, Nicholas Rashford, Patrick Riordan, David Tuohy and Joe Veale. I thank Una O'Neill, RSC for the opportunity to work in an ignatian manner with the Religious Sisters of Charity. A special thanks is due to Joe Tetlow, who as my tertian director encouraged me to follow the spirit into academic life and writing, and as Director of CIS has supported and made this publication possible.

Plan of the Book

The book is divided into two parts. Part 1 outlines the organisational dynamics of the Society as found in the ignatian heritage of the Spiritual Exercises, Constitutions, Complementary Norms and the decrees of the recent general congregations. Part II introduces the theory and practice of organisation development as an approach to change which focuses on reeducation and helping people learn and make the changes. Where it seemed helpful, chapters conclude with some reflection exercises on the application of the theory to practice.

PART I

THE IGNATIAN ORGANISATION

CHAPTER 1

"A SINGLE BUT COMPLEX REALITY"

> All members of the Society of Jesus, even though dispersed in various local communities and ascribed to individual provinces and regions, are inserted directly and primarily into the single apostolic body and community of the whole Society.[1]

The above sentence from the Complementary Norms contains all the essential parts of the "single but complex reality" [2] of the Society. Individual Jesuits are inserted into the single body of the Society even while; they live and work in local communities and apostolates within a specific province or region. The single body of the Society, the province or region, the local community and apostolate, and the individual Jesuit are levels of the one complex reality. [3] (Figure 1-1)

Level I	Individual members of the Society
Level II	Dispersed in local communities & apostolates
Level III	Ascribed to individual provinces & regions
Level IV	Inserted primarily & directly into the single body and community of the Society

Figure 1-1 Levels of Participation in the Society

Level I: Individual

[1] CN, Part VII, Chapter 3, 255
[2] CN, Part VII, Chapter 1, 245

The individual joins the Society out of a sense of a call from God which is individual and personal and which finds expression in membership of the Society. The individual Jesuit grows in his understanding of this call as he moves through his life cycle and reflects on his experiences in ministry, community life, retreats and so on. The individual Jesuit's growth and development in the Society and his work in ministry is facilitated by his engagement in spiritual direction. Through spiritual direction, the individual Jesuit can attend to the issues that emerge in his life and explore them in a context of prayer and development.

Of course we know that the relationship between an individual Jesuit and the Society does not develop automatically into maturity or positively only. Individuals may become disaffected with their life in the Society. Through particular experiences in formation or ministry or through decisions of superiors which they could not accept, they may become alienated from their superiors and their peers and settle for a life of disaffection. Some are afflicted by addictions or illness, whether mental or physical. Others decide that the focus of their life lies elsewhere and leave the Society. The body of the Society comprises those who are active and committed, those who are alienated and disaffected, those who are ill, and those who are elderly and retired. All are equally members of the Society.

The Society's effort in regard to the individual is to help him belong to the Society through an appropriate psychological and religious contract. It responds to the individual by forming a context and environment conducive to the development of his vocation. The Society formalises this through initial formation and tertianship, but

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[3] *Renewing Apostolic Religious Life,* Chapter 1.

also through the annual manifestation with the provincial from whom the individual receives his mission. The Society structures particular events, such as the annual retreat, and others, such as special courses and sabbaticals that an individual may utilise from time to time.

Superiors perform the function of enhancing the Christian growth and apostolic effectiveness of the individual Jesuit. They enable the creation of a discernment process in which Jesuits are encouraged to grow and be involved, finding an apostolic ministry and community living that develops them as individuals while the Society's apostolic endeavours benefit from that involvement. There is serious tension in this matching process. Individuals attempt to bring their own unique selves to the Society and, at the same time, adapt to obedience and the Society's culture.

In apostolic renewal individual Jesuits have to change, as we know very well after GC 31. They may change what they do, how or where they do it. Many moved out of secondary school teaching into other ministries. Jesuits in retreat ministry moved from preaching to guiding the Spiritual Exercises. Jesuits may change their attitudes towards their ministry or some particular aspect of it, with implications for a change in some aspects of an individual's theology or spirituality. Many of those who have moved into small communities among the poor have reported that their spirituality changed consequently.

As a consequence of these changes, an individual Jesuit's sense of bonding to the changed or changing Society may alter, either positively or negatively. If change is not well managed individuals may feel alienated and move to defensive behaviour. It

is important to work with individuals' negative perception of the change, which may be located in a particular individual's personality or in how the change is introduced and managed. If change is well managed, individuals may feel enthused and committed.

The bonding relationship between the individual Jesuit and the Society constitutes the first level of participation in apostolic religious life and is articulated in the Constitutions as the growing incorporation of the individual into the body of the Society.

Level II: Ministry Team & Community

The second level in the Society consists of ministry teams and community. In a ministry team, the individual Jesuit enters into working face-to-face relationships in ministry with other Jesuits and with non-Jesuit colleagues. The individual team member's task is to contribute to the team's functioning; the team's task is to function as a unit. This can be helped by if members of team learn the skills of working together managing their own collective reflection to learn from their shared experience. Level II also includes community life in which the individual Jesuit and fellow Jesuits make the efforts to form a union of minds and hearts to support personal and apostolic life. It includes the ad hoc commissions and task forces which provincials set up around particular subjects to help develop policy or to give him advice. It includes the working relationship between superiors and directors of works,

who while they have distinct responsibilities they have a shared role for the apostolate and are required to work in collaboration with one another.[4]

In apostolic renewal, groups, teams and communities have to change. Apostolic teams have moved from being totally Jesuit in membership to comprise Jesuits and lay colleagues, including women. Apostolic teams may be set new goals and targets; they may have to work differently. This may require that teams engage in the sort of teambuilding activities which will help their members adapt to the change and integrate it into priorities and ways of working. If little or no attention is given to such integration, particularly in situations where the change is not accepted or where it requires a great deal of work to integrate the change into the work of the team, then relationships within teams may deteriorate and the collective identity of the working team may disintegrate. After GC 32 apostolic teams worked at setting new goals in the light of Decree 4.

Groups and teams are integral to a change process in the form of temporary committees and task forces, which are typically used to develop policy and generate commitment to change by participation in policy formulation. In any province, there are many standing task-forces or committees - ministries commission, formation commission, temporal administration commission - and from time to time a task-force may be set up with a given task to investigate a particular issue and submit recommendations to the provincial. Such groups need to be able to attend to the collective spiritual dynamics of the group and to model a way of working which consciously deals with questioning assumptions and facing fears in the context of

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[4] *Guidelines for the Relationship between the Superior and the Director of the Work*. Curia of the

shared faith and taking these experiences to prayer together.[5] It is essential for the renewal of provinces that not only communities and ministry teams but also task forces and commissions become skilled at apostolic discernment in common.

Level III: Province

The third level in the Society is the province level, which is made up of multiple face-to-face ministry teams and communities within a geographical jurisdiction. The province level's key activities are to integrate the work of teams around a common province vision and priorities and to distribute scarce resources, such as personnel and finance. So in a province this means an effective co-ordination of apostolates in education, pastoral ministry, spiritual ministry and so on in a planned manner which reflects province priorities. This co-ordination can be called "strategic management".

"Strategic management", whereby the expressly chosen direction of the province's apostolic thrust is co-ordinated among the interrelated ministries of the province, is the process for achieving effectiveness on this third level. Typically it involves setting priorities, that is creating a view of the many ministries of the province which helps articulate how they stand in relation to each other in terms of future development, closure or passing to other ownership. It includes a plan of how Jesuit personnel might be deployed and how collaborative structures with non-Jesuit colleagues might be evolved. I will develop the theme of strategic management in Chapter 3.

Society of Jesus: Rome, 1998

[5] *Renewing Apostolic Religious Life*, Ch 7.

The province must be capable of reflecting on its own collective experience. When a province lacks this skill, it can face difficulties. Individuals in one ministry feel no responsibility for other ministries. They are antagonistic towards the provincial when he wants to move a man from one ministry to another and pressurise him for resources for "their" apostolate. The provincial has a difficult task enabling the members of a province to think "province" and act on this level.

A development at this third level which is becoming more significant is inter-provincial activity in which provinces form a conference and in which provincials meet to create areas of collaboration, take on joint ownership of projects and engage in collaborative planning and review. Inter-provincial co-operation complicates province planning and management at Level III as it requires provincials to be aware of and own issues which extend beyond the horizon of any particular province and be willing to make adaptive changes within a province in order to co-operate in an inter-provincial venture. It challenges provincial insularity and frequently demands that individual provincials give up individual control over particular ministries and allow these ministries be overseen by the conference of provincials.

In apostolic renewal the province level involves the integration of change across different ministries and communities, particularly apostolic priorities and the allocation of resources. The perspective of a faith that does justice which developed after GC 32, resulted in many provinces altering the balance of their ministries across the province. Men and resources were re-allocated to ministries and communities inserted among the poor. In many provinces the fall in vocations and

the older age-profile of the province have resulted in the closure or hand-over of apostolates now judged to be of lesser priority in a context of diminished resources.

An intervention at this province level which has developed in recent years is the province assembly in which many members of a province come together for several days to discuss policy issues and set a strategic direction for the future. In an assembly, the whole system is on view - its past (where it has come from, its history, traditions...), its present (the ages of its members, its current ministries, how the past, present and future are perceived, how the members feel...) and its future (the direction in which it wants to go, in which it can go...). Assemblies are a means of developing a sense of province commitment to change and, as such, can be integral to an organisation development programme.[6] One province used a sequence of annual assemblies to build ownership of its strategic direction. Each year successive stages of the province plan were presented and discussed so that there was a continuity in the assemblies over several years.

Level IV: The Single Body of the Society

The single body of the Society, into which individual Jesuits are primarily inserted, constitutes the fourth level. The Society's mission is to minister to the contemporary world according to the spirit of the Constitutions and the general congregations. The constituent elements at this level are a deep-rooted united spirituality, an assessment of the internal resources of the Society, a knowledge of the external world, integrated to form a direction for the Society in the concrete world in a given time frame.

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[6] *Renewing Apostolic Religious Life*, Ch 8.

The main mechanism enabling mission of the single body of the Society is the planning, action and review processes in which the anchor is the charism of the Society. It is out of a clear and united sense of identity that internal resources can be combined with an analysis of the external world - socio-economic, religious, cultural, political etc. - in order to provide the framework for prayerfully discerning significant direction for the Society's apostolic ventures. Analysis of the external world can be done through social and cultural analysis, both of which are tools for critically evaluating significant environmental forces relevant to the Society's mission. The Society's identity feeds into apostolic choices through the selection of criteria. Criteria emerge from the Society's foundation experiences and are given a contemporary articulation by the general congregations. Then, decisions are taken as to what the thrust of the Society is to be over a given time frame. The general congregations provide a useful illustration of this fourth level in operation. This theme will be developed further in Chapter 3.

In apostolic renewal there is change for the body of the Society. Change at this level focuses on how the Society is adapting to the demands of its external and internal environments in the spirit of the Constitutions and the decrees of the general congregations.

At this level there have been massive changes since GC 31. The visible artefact of lines of men in black habits filing too and from the chapel after dinner has gone. The structured programme of formation has altered radically. On a more conceptual level

the Society's option for a faith that does justice in GC 32 and its contemporary emphasis on culture in GC 34 are illustrations of changes in articulation of mission.

These visible changes have resulted in changes not only in behaviour - Jesuits do things differently - but also in attitude - Jesuits think differently about these things.

The Four Levels as Discrete and Separate

The processes and interventions of the four levels are distinct and separate. Level II processes are different to those at Level I. For example, if a team or community is problems are is due to its difficulties in establishing common goals, getting the work done, ineffective or inappropriate communication or decision-making processes, then Level II team or community building interventions are pertinent. If the issues in the team or community boil down to particular individuals' personal issues with regard to themselves and their relationship to the Society, then Level I interventions are appropriate. Particular interventions can only be effective if they are addressing the correct issues.

Level III processes involve the province as a whole, for instance, as all the members try to adapt to the option for the poor. The processes of Levels I and II still go on at Level III. This means that individuals view the province from their own individual perspective, or teams view the province from the limited perspective of their own ministry or community. Hence it is important to distinguish issues and dynamics which belong to Level III. The process of developing a province consciousness is

therefore difficult. A particular example of a process to develop province consciousness is the province assembly.

The strategic processes by which the Society plans and manages its ministries to the people of God constitute Level IV. This level begins with the general congregations setting the mission of the whole Society, which the provinces then implement with the leadership and encouragement from Father General and his curia. For this Level IV to work properly, the mission must be articulated, external needs identified, and the order's internal operation (individuals in tune with their vocation and the order's mission, ministry teams working well together, and provinces working in a unified, co-ordinated manner) in place.

INTER-LEVEL DYNAMICS

The four levels are integrally linked. Each of the four levels affects and is affected by each of the other three.

A clear example of the inter-dependence and inter-relatedness of the four levels can be seen in the Society's experience of the development of the spirituality of justice and its centrality for Jesuit life and ministry. The reformulation in 1974 of the Society's mission in "Our Mission Today" in terms of "the service of faith of which the promotion of justice is an absolute requirement"[7] (a Level IV activity) made organisational demands on each province of the Society. Provinces had to review their ministries in the light of this reformulation (Level III). Individual apostolic teams, in turn, took "Our Mission Today" and applied it to their own ministry (Level II). The decree demanded a change in the individual Jesuit's sense of identity resulting in many Jesuits feeling re-energised in their relationship to the Society and others, unable to identify with the new direction, were marginalised and felt that it was no longer the order they joined (Level I).

In this example, the movement is from Level IV through III to II to I.

In a similar vein, we can see that what happens in a ministry team or community affects how the individual can feel about his life and work, a movement from Level II to I. If an individual is having personal problems or is disaffected in his life he can behave in a dysfunctional manner and disrupt the work of a team or life in community. So Level I affects Level II. Decisions at provincial level regarding allocation of personnel affects the work of ministry teams and the life of communities and so on, Level III affecting Levels II and I.

Discernment is critical to inter-level dynamics in the Society. Each individual Jesuit is expected to engage in discernment, not only his own life and mission (Level I), but also in communal and apostolic discernment in common (Level II). While it is considerably more difficult to organise and manage logistically, a province must be able to engage in apostolic discernment (Level III). For a province to discern, its individual members and apostolic teams and communities must have the dispositions and skills of discernment.[8]

The inter-relatedness and inter-dependence of the four levels are central to the process of renewal in the Society. For renewal to take root in a province, key individuals have to recognise the need for change and change. Individuals may have to change what they do or how they do it. Apostolic teams and communities have to apply themselves to the change agenda. The change must be generalised across the province. The continuous rounds of meetings, consultations and discernments which characterise the dynamics of change illustrate how the change agenda progresses through a province

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[7] GC 32, Decree 4, "Our Mission Today", # 48

[8] "On Apostolic Discernment in Common", Peter-Hans Kolvenbach, *Letter to the Whole Society,* 6th November, 1986.

as individuals and teams/communities deal with the change issues and move the change to the wider system across the province.

PROVINCIAL LEADERSHIP

Provincials have the task of integrating the four levels in a province. Provincial leadership involves managing, not only at each level but between all of the levels. They are the chief executives of their province and so are responsible for the overall leadership and maintenance of its many different activities.

Provincials receive the manifestation of conscience of the members of their province and give them their mission - the core process of Level I.[9] They work with local superiors and directors of works, a Level II focus. They lead and administer the development and coordination of all the activities of the province - a Levels III focus.[10] They are responsible for the developmental direction of the province in tune with the whole body of the Society – a Level IV focus.[11]

Provincials, like all corporate leaders, live in two time zones. They live in the present, governing their provinces; they live in the future, having a sense of vision and purpose about where they want to lead the province. This focus is referred to as a strategic focus since it requires provincials to think and act strategically. This will be developed in Chapter 3. The exercise of the leadership role requires a dual concern for the apostolate and for the people working in it (the traditional terms, cura apostolica

[9] GP, # 62.
[10] GP, # 4.
[11] GP, # 9.

and cura personalis).[12] So it is clear that provincial leadership addresses all four levels and the inter-relationship between them.

CONCLUSIONS

As the Complementary Norms state, the Society is "a single but complex reality". Looked at as an organisation, this complex reality refracts into levels of participation. These levels articulate the relationship between an individual's inner motivations and apostolic life (Level I), how that apostolic life is lived out in ministry with others (Level II), in a complex inter-relationship with other ministries in a changing world of limited resources (Level III), according to the spirit of the Constitutions and the general congregations (Level IV). (Figure 1-2) If a provincial, a superior or director of an apostolate is sensitive to these four levels of operation and can understand how to intervene appropriately in such a way that individuals, teams, provinces, and the Society itself can come to understand its own behaviour, then effective change can take place. The formator can utilise this framework to give those in formation a model from which they can participate more fully in the life of the Society. The spiritual director can use it in mapping different issues that emerge in spiritual direction contexts. For the consultant, it provides a significant diagnostic tool in working with processes of renewal.

[Figure 1-2 inserted around here]

[12] *Renewing Apostolic Religious Life,* Chapter 3.

For provincials, superiors and those concerned with the process of renewal, the "single but complex reality" poses immense challenges. How does a provincial initiate, lead and support renewal and change by individuals, teams, communities and the province? These challenges will be addressed throughout this book. Before moving to them I will review the ignatian process of renewal in the following chapter.

As a closing note to this chapter, I alert readers to the fact that the four levels of participation in the Society which I have described are not comprehensive. There are other dimensions to the life of the Society which could be articulated in terms of further levels than the four presented. For instance, the Society exercises its mission within the Church.[13] Provincials negotiate with bishops the exercise of ministry within particular dioceses. The decrees of general congregations are approved by the Holy See. There is close liaison between Father General and his curia and the Vatican curia. From one perspective this relationship is a relationship between different organisations. From another perspective it is simply another level of complexity of the Society, a fifth level. To take a further instance, the inter-organisational process of ecumenical and inter-faith dialogue may be a sixth level.[14] As this book is focusing more on the internal dynamics of the Society these levels are not receiving further attention other than this brief outline.

[13] GC 34, Decree 11, "Having a Proper Attitude of Service to the Church".
[14] GC 34, Decree 5, "Our Mission and Interreligious Dialogue".

EXERCISE 1-1.

APPLYING LEVELS TO AN APOSTOLATE/PROVINCE*

	INDIVIDUAL	TEAM/COMMUNITY	PROVINCE	SINGLE BODY OF THE SOCIETY
INDIVIDUAL				
TEAM/COMMUNITY				
PROVINCE				
SINGLE BODY OF THE SOCIETY				

1) Name an issue with regard to the renewal of individuals or a particular individual and insert it in the shaded individual box.
2) Now work diagonally along the shaded boxes. How does that individual issue have an impact on the team, the province and the single body of the Society respectively?
3) Where would you put your energy to:
    a) Initiate renewal?
    b) Keep renewal progressing?
    c) Heal dysfunctions?

Alternatively,

1) name an issue which applies to the whole body of the Society and insert it into the shaded single body of the Society box

* Adapted from *The Inner World of Teaching*, David Tuohy. Falmer: London, 1999.

2) Work diagnally along the shaded boxex. How does that issue apply to the province, the team/community and the individual?
3) Develop actions to implement at each level.

NOTES

NOTES

CHAPTER 2

THE IGNATIAN METHOD OF LEARNING AND CHANGING

The Society's way of proceeding as articulated in the Spiritual Exercises, Constitutions, Complementary Norms and the recent general congregations, contains dynamic processes of learning and changing. It is utilised by individuals, teams, apostolates, provinces and the whole Society. This way of proceeding has come from Ignatius who continually reflected on experience, both his own and others', and brought that experience to the formulation of the Constitutions.[15]

IGNATIAN SPIRITUALITY AND INDIVIDUAL CHANGE

Ignatius did not articulate a formal theory of how people learn, but he created a process – a series of exercises – through which an excercitant experiences what God wishes, reflects both on what God wants and on the process itself, and then chooses a future direction in life. In the Introductory Notes to the Spiritual Exercises, Ignatius articulates his ground rules of process of the Spiritual Exercises, both for the one directing the Exercises and exercitant. The exercitant goes through every method of spiritual activity to become free to find God's will, reflecting and praying with the light of God's grace. The one giving the Exercises acts in a facilitative manner by listening to and encouraging the exercitant, structuring the exercitant's times of prayer and suggesting the order of the Exercises.

The process of the Spiritual Exercises is a re-educative process, involving thought, values and behaviour. At different times the dynamic of the Exercises focuses on thoughts, feelings, values and action. The exercitant considers on how his or her life is going and reflects on it in the light of God's way of acting and attends to the feelings which are aroused in those considerations. In the First Week, he or she focuses on a development of knowledge of his or her own personal disorders and sin, and how God responds to that, which culminates in a deep sense of gratitude. In the Second Week the exercitant contemplates the life of Christ and faces the choices which discipleship demand. Through meditation on the Call of the King, The Two Standards, consideration of the Three Classes of People and three Degrees of Humility, the exercitant faces his or her own value system and so moves to a consideration of a change in way of life. Ultimately, a change in behaviour is the desired outcome of the Exercise*s*.

For the Jesuit, this process of change is integral to his formation and way of living his Jesuit life. The core experiences of the Spiritual Exercises in the novitiate and tertianship, together with the eight-day annual retreat, reinforce the sense of how the process of the Exercises defines his identity.

> What is it to be a Jesuit? It is to know that one is a sinner, yet called to be a companion of Jesus as Ignatius was: Ignatius who begged the Blessed Virgin to "place him with her Son" and who then saw the Father himself ask Jesus, carrying his Cross, to take the pilgrim into his company.[16]

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[15] *The First Jesuits*, John O'Malley, Harvard University Press: Cambridge, MA, 1993.
[16] GC 32, Decree 2, "Jesuits Today", # 11.

For the Jesuit, his own experience of the dynamic of the Exercises is central to how he exercises ministry and how he directs people in their relationship with God. The grace of freedom is central to his membership of the Society.

The Spiritual Exercises have formed the basis for a spirituality of action in which individuals can take their experience and reflect on it to discern where the Spirit of God is calling them. Attention to the movement of the Spirit is the key to the reflective process. Individuals take their total experience - the reality around them, events which occur, feelings, cognitions - evaluate them in the light of the Gospel, consider options, weigh alternatives, make judgements, take action and review in the light of experience. The link between experience and action is actualised through reflection.

Hence, a spirituality defined in terms of experience, reflection, decision and action is typically termed ignatian and is the basis for educational pedagogy as well as spiritual development. [17] [18] (Figure 2-1)

[Figure 2-1 may be inserted here]

IGNATIAN SPIRITUALITY AND GROUP CHANGE

The pedagogy of the Exercises can be adapted to a group situation in order that the leadership and membership of an apostolate engage in a prayerful reflection on their experience of ministry to see where God is leading. The adaptation is a complex

[17] *Ignatian Pedagogy: A Practical Approach*, International Centre for Jesuit Education: Rome, 1993.

process. It involves the group or apostolic team attending to both *content* and *process* issues. *Content* issues are those issues which are directly related to the group's task: what the purposes and goals are, what means are used to achieve goals, and so on. *Process* issues refer to those issues which are critical to how the members of the team or group work together as a cohesive apostolic unit. The members must attend to and engage in dialogue on such process issues as: how its members communicate among themselves, how feelings and emotions are expressed, how problems are solved, how decisions get made, how leadership style affects the group, how power is exercised and conflict is managed. Members must also attend to external relations with other groups, and the norms and cultural assumptions which, though hidden, govern behaviour in the team or group.[19]

If the group is to engage in apostolic discernment in common it must also develop an awareness of the effects of sin in the group, for example, mistrust, vulnerability to inappropriate desiring, failure to review and so on. It also needs to develop a sense of corporate gratitude through praying with its communal graced history. It reflects on the use of power and leadership in the group and acknowledges the disorder and sin of the group's history. Through these activities, the group recognises its experiences of consolation and desolation.[20] In this manner, the group engages in a contemporary ignatian approach to group renewal.[21]

For a more complex system than a small group, such as a province, the ignatian process of reflecting on experience has even greater complexities.

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[18] *Ignatius Knew*, Ralph Metts, Jesuit Secondary Education Association, Washington, DC, 1995
[19] *Process Consultation Revisited: Building the Helping Relationship,* Edgar H. Schein, Addison-Wesley: Reading, MA, 1999, Chs. 8-9.
[20] *The Group Meeting as a Contemplative Experience,* Judith Roemer, Jesuit Center for Spiritual Growth: Wernersville, PA, 1982.

The decree, "Our Mission Today" from the Thirty-second General Congregation, presents the Society's approach to apostolic renewal. It defines the Society's mission, the apostolic challenges facing it in the contemporary world, the qualities of the Society's response and the need to "undertake a thoroughgoing reassessment of our traditional apostolic methods, attitudes and institutions with a view to adopting them to the new needs of the times and to a world in process of rapid change".[22] It points out that the renewal process involves learning to see the Society's own blindnesses.

"Our Mission Today" presents an ignatian process for the Society.

> The general method to be followed to produce this awareness and to engage in this discernment may be described as a constant interplay between experience, reflection, decision and action, in line with the Jesuit ideal of being "contemplative in action". The aim is to insure a change of heart in our habitual patterns of thought, a conversion of heart as well as of spirit.[23]

In this key paragraph of the decree, the Society is recognising the importance of change as a process of learning and it is emphasising the centrality of learning skills in apostolic renewal. If change and renewal are to be ongoing, as they are in a constantly changing world, then learning how to learn and how to change are essential.

IGNATIAN SPIRITUALITY AND PROVINCE CHANGE

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[21] *Ignatian Spiritual Exercises for the Corporate Person, Vols. 1 & 2,* J. Borbely, SJ, M. Carew, J. English, SJ, J. Haley, J. Roemer & G. Schemel, SJ., 3rd edition, University of Scranton, PA, 1990.
[22] GC 32, Decree 4, “Our Mission Today”, # 58
[23] GC 32, Decree 4, “Our Mission Today”, # 122.

How can an organisation, such as the Society, a province or an apostolate engage in the ignatian process? One helpful framework which accommodates the process of experience, reflection, decision and action in an organisational setting has been termed the "adaptive coping cycle".[24] The adaptive coping cycle has six steps. These steps begin with a sensing of change in some aspects of the province's external or internal environment and end with a more adaptive, renewed organisation (Figure 2-2). While these steps are separated conceptually, in practice they overlap and occur concurrently:

1. sensing a change in the external or internal environment
2. getting the information to the right place where it can be processed and acted upon
3. digesting the information and drawing the right conclusions
4. making necessary internal changes in the organisation and managing the change
5. developing new actions
5. obtaining feedback on the new actions - new sensing cycle.

[Figure 2-2 may be inserted here]

1. Sensing a change in some part of the internal or external environment.

The organisational adaptive coping cycle begins when someone senses the need for change. It may be that those who are inserted into the life of the poor see directly how the poor's disadvantaged position is being consolidated and the accompanying

[24] *Organizational Psychology*, Edgar H. Schein, 3rd edition, Prentice-Hall: Englewood Cliffs, NJ, 1980.

challenge that has for the Gospel, as was the case when those working in Latin America in the 1960s and 1970s had a sense that the promotion of justice was a central element of serving the faith. It may be that those who are engaged in social analysis and theological reflection conceptualise the challenges to the faith from contemporary culture. It may be that a provincial viewing the province from an internal frame of reference sees the need to adapt a province's ministries due to the fall in vocations.

2. Getting the information to the right place where it can be processed and acted upon

The disconfirming information of Step 1 has to be taken into the province and reflected on. This happens in various ways. The provincial and consultors, for instance, may reflect on opening a new ministry or reallocating personnel and finance to respond to the perceived needs. Those in the education sector may reflect on how some Jesuit schools in a province need to change the kind of pupil they attract. Those giving formation may find some implications. What is critical is that the voices of those who are sensing change be heard and that the whole province reflect prayerfully on the meaning of what is being sensed in the light of criteria. Ultimately, the provincial decides and missions the change. It may be that what is sensed is sent to Father General in annual letters, and in some instances tabled for discussion at a general congregation.

3. *Digesting the information and drawing the right conclusions*

Organizational Learning: What is New? Edgar H. Schein. In R.A Rahim, R.T. Golembiewski, & L.E.

Step 2 is about getting the information to where it can be processed. This third step is about processing the information and digesting its implications. It involves factual analysis, discussion of possible multiple interpretations of the facts, generation of alternative actions, discernment and decision making.

4. Making necessary internal changes and managing the change

Changes then have to be made. This is not a simple process. The changes may involve closing apostolates, opening new apostolates, redirecting personnel or refocusing the mission of an existing apostolate. This last option is possibly the most complex as it involves the processes of unlearning and re-education, the management of resistance and conflict and the realignment of apostolic priorities in a province. This is the core of what this book at attempting to articulate and will be developed in more detail in Chapters 3, 5, 6 and 7.

5. *Developing new apostolic actions more in line with the originally perceived changes in the environment.*

The outcome of this process of sensing, reflecting and making changes may be new apostolates, or apostolates exercised in a different location for a different group of people, or apostolates exercised in new or different ways. The changes made have some visible manifestation, outcome and impact, which must be directly related (a) to the mission of the Society, and (b) to the changes sensed in step 1.

Pate, (Eds.) *Current Topics in Management, Vol. 2*, JAI Press: Greenwich, CT, 1997

6. Reviewing and obtaining feedback on the new actions - new sensing cycle

This sixth step is about reviewing the outcomes of the new actions and obtaining feedback on those outcomes. A review process must not be limited to Jesuits' perception of the effects of the change but must includes review by those with whom Jesuits work and for whom the changes are ultimately designed. Review and feedback open the possibility of sensing change, and so initiate a new adaptive coping cycle. I will discuss the process of review more fully in Chapter 3.

A province may have dysfunctions on any of the six steps of the adaptive coping cycle. It can fail to sense changes in the environment or it can misinterpret them. It can fail to transmit and reflect on the relevant information. The information may fail to generate the necessary change, blocked by people's fears or an inability to engage in discernment. There may be inadequate review of the effect of the changes by those

The general congregations are good illustrations of the adaptive coping cycle in operation at the level of the whole body of the Society. For the last hundred years, there has been a general congregation in each decade, from the 23rd in 1883 to the 34th in 1995. Each congregation has engaged in the task of taking in and discussing the implications of forces for change in the external and internal environments, and then mandating changes for the Society which are implemented and reflected on, and fed in to subsequent congregations. So the cycle continues.

For example, as a consequence of Vatican II and GC 31, Jesuits began to listen to those they served. Out of Vatican II and GC 31 grew working with the laity, ecumenism and interfaith dialogue. As the age of the laity developed Jesuits began to hear the cry of the poor, along with the whole Church. This was fed into GC 32 and the Society articulated its mission in terms of a faith that does justice. As working for justice began to mean different things in different cultures, some Jesuits found themselves involved in politics and economics, which fed into GC 33, which confirmed the preferential option for the poor. As Jesuits were working for justice in different ways in different cultures, as the movement of the laity developed and issues regarding the place of women in the Church exploded, GC 34 felt the need to locate the mission of the Society in Christ's mission and in all cultures.

This movement from GC 31 to 34 can be understood in terms of continuing adaptive coping cycles as experience is reflected on and taken to general congregations for further reflection and subsequently reexpressed in terms of the Society's mission, and taken to further implementation and reflection.

The adaptive coping cycle is a process which may be used by any organisation. What Jesuits bring to it in order to make it ignatian are the characteristics of "our way of proceeding".[25] Characteristics for the individual - deep personal love of Christ, being a contemplative in action, being in solidarity with those most in need, called to learned ministry, being sent and always available for new mission and ever searching for the magis - are accompanied by those characteristics which reflect working with others - partnership with others, inter-religious and cultural dialogue, and an apostolic body in the Church. They are the values which underpin how information is disgested and alternative actions are evaluated; they direct implementation. These characteristics, when operative, give a spiritual depth to the processes of sensing, reflecting, changing, implementing new apostolic actions and reviewing without which the adaptive coping cycle for the Society becomes secular.

CONCLUSIONS

I have taken the ignatian process of experience, reflection and action from individual to group to province levels. The adaptive coping cycle constitutes an organisational process which illustrates how change is a cyclical activity and is an organisational application of the ignatian steps of experience, reflection, decision and action. As articulated by the 32nd, 33rd and 34th General Congregations, what is critical to the whole process is an openness to experience, a willingness to reflect in the light of the gospel and ignatian criteria and to act accordingly. In an organisational context, as in a province, the processes of experience, reflection, decision and action are complex

[25] GC 34, Decree 26, “Characteristics of Our Way of Proceeding”, #535-563

processes involving individuals, teams and communities, and the province. This dynamic will developed further in the Chapter 6.

EXERCISE 2-1

CORPORATE REFLECTION PROCESS FOR AN APOSTOLIC GROUP

This is a series of steps to help members of an apostolic group reflect prayerfully in order to come to decisions.

Step 1. Remote Preparation

Each member of the group spends time in prayer directed towards to attaining the dispositions of freedom to participate in the group and seek the truth under the influence of the Holy Spirit. All ask for the grace of gratitude and trust.

Step 2 Immediate Preparation

Members share with one another the fruit of the above remote preparation or the history of their own vocation.

Step 3 Reflection on the Matter Proposed

Each individually reflects on the experience of the matter proposed, seeking to combine the hard work of thinking things out with a desire for and openness to the Spirit.

Step 4 Sharing

Each shares the outcome of Step 3, both what it is he or she concluded and his or her moods during the process of reflection. Individuals make ask questions only for clarification. No discussion, only listening.

Step 5 Group Listening

Each reflects on what he or she has heard in the group. What does he or she hear emerging as common? What is emerging as common to the whole group? Where are there differences?

Step 6 Sharing on Group Listening

Each shares what he or she has heard on what is common in the group. No discussion. Summarisation allowed. What is shared is recorded on newsprint.

Step 7 Opportunities and Options Emerging

The outcome of step 6 is viewed and discussed. What is emerging? Is there consensus? Are options emerging? Can we balance options? What action is called for?

Step 8 Choosing from among the options

Step 9 Detailing concrete plans and review

There may be times when the group needs to retrace some of the steps, as when the dispositions are lost or the group gets into desolation or the exercise becomes purely an intellectual one.

EXERCISE 2-2

THE ADAPTIVE COPING CYCLE

Reflect on an instance of the province or an apostolate going through the Adaptive Coping Cycle.

1) Where did the sense of the need for change originate? What was the change that was sensed?
2) What happened to that sense of the need for change? Where was it taken?
3) By whom was the information processed? How? What conclusions were drawn?
4) What changes were made in the province or apostolate? Where? How?
5) What new apostolic actions were developed?
6) How were those actions reviewed? What was the outcome?

NOTES

NOTES

CHAPTER 3

APOSTOLIC PLANNING AND REVIEW*

The Thirty-fourth General Congregation called for an ignatian approach to province planning and review.

> The Provinces should evaluate their apostolic planning using the Ignatian criteria of the constitutions, read in the light of our mission today. Read in the light of the faith which seeks justice, the criterion of "greater need" points towards places or situations of serious injustice, the criterion of "more fruitful" toward where ministry can be more effective in creating communities of solidarity, the criterion of "more universal good" toward action which contributes to structural change to create a society more based on solidarity. After decisions are made, it is of crucial importance to evaluate the process of implementation. Annual review of the accomplishment of objectives during the year can help determine objectives of the coming year. Serious and regular review of effectiveness in carrying out our mission will give credibility and realism to our province and institutional planning.[26]

The congregation's mandate - plans and objectives, implementation and reviews - can be fulfilled by the process called "strategy. *Strategic planning* is planning for the fulfilment of an organisation's fundamental purposes. It is critical to define strategy in these terms. For typically the term *planning* connotes mapping out what is to be done and detailing schedules of actions and events. Strategic planning, however, precedes such details; it is about how the members of an organisation are mobilised to achieve the purposes for which the organisation exists.

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* This chapter is an adapted version of "Strategic Planning as an Instrument for Renewal", David Coghlan, SJ, *Review of Ignatian Spirituality,* Vol. XXVII - 3 No. 83, 1996, pp. 25-34.

[26] GC 34, Decree 3, "Our Mission and Justice", #22

Organisations engage in strategy to mobilise themselves to be better able to do what they want to do in a competitive and changing world. In other words, strategy is fundamentally a way of thinking about and acting on how a complex system, such as an organisation - whether a commercial enterprise, a hospital, a school or a province - can move purposefully into its future in the light of its mission. As the Society is an organisation, it has also to engage in strategy in order to remain faithful itself as it renews its ministries in a changing world.

Strategic planning is about relationships. In the Society, first, there is the relationship of the purpose of the Society to provincial leadership and to living provincials' aspirations for their term of office. Second, there is the relationship of the Society's purpose to the demands, opportunities and constraints of the present and future environment of a province. Third, there is the relationship of the Society's purpose to the specific objectives a province sets and the programmes it undertakes. Fourth, there is the relationship of purpose to structure and processes of government. These relationships are at the heart of any co-operative effort. When the Society or any of its ministries engage in renewal, it must do so in the context of the purpose of the Society, the limitations of the Society's resources and the changing needs of the world it serves.

THE FOUR ELEMENTS OF STRATEGIC PLANNING

Part VII of the Complementary Norms describes the process the Society must use in coping with necessary change. These paragraphs actually contain the four central elements of strategic planning that the Society intends doing.[27] (Figure 3-1)

> "The criteria for review, found in the Constitutions themselves and illuminated by the decrees of the general congregations and the instructions of superiors generals, retain their perennial validity
> "We should always keep in mind social conditions and pastoral programmes, the apostolic forces available or hoped for, the more pressing pastoral and apostolic needs, and the help that ought to be given to Father General for more universal works.
> "Social and cultural analysis of the real state of affairs should also be employed from a religious, social and political point of view, based on serious and specialised studies and on accurate knowledge of these matters".
> "According to this way of proceeding, which is to be used by local, provincial and regional communities, superiors can employ the customary consultations and then draw up apostolic options to be submitted to Father General."
> "Keeping ourselves available to the Holy See above all, let all our members and especially superiors propose to themselves to follow the plans, judgements and works of the local hierarchy; to implement them; and to be animated by the spirit and impulse toward fellowship, by which our works are harmonised with the pastoral programmes of particular churches, according to the constant tradition in the Society of serving the Church by explaining, propagating and defending the faith

[Figure 3-1 about here]

1. The first element of planning is the criteria in the Constitutions, the decrees of the recent general congregations and the instruction of Father General.

2. The second element, contained in the phrase "apostolic forces available or hoped for", maps the resources available to the Society in quantitative terms (the number of Jesuits, their ages, lay colleagues. resources, finance) and qualitative terms (tradition, skills, desires).

3. The third element is the outward looking perspective which provides the framework for clarifying the complexity of the outside world confronting the

[27] CN, Part VII, Chapter 3, Sections 258-259.

apostolate. This means reading the signs of the times and interpreting them in the light of the gospel through social analysis and theological reflection.

4. The fourth element, "the apostolic options" is developed from the first three elements of criteria, available apostolic forces and analysis. This is the actual planning stage in which goals are set for a given time period.

5. Finally, the activities of the Society are in the service of the Church, both universal and local.

The process of moving from ignatian criteria to strategic plan is a process which must have an appropriate blend of rational analysis, judgement and prayerful discernment. In its essence, strategic planning is about making a difference and mapping significant areas and tasks which are judged to be desirable in order to make a difference.

Strategic thinking and action have always been present in the Society. When GC 8 (1646) decreed that the teaching of grammar and humane letters "is a ministry that is proper to the Society; it is not restricted to a particular time or to given individuals,"[28] it was engaging in strategic thinking by addressing an issue which the congregation fathers considered significant for the mission of the Society. In a similar vein, when GC 29 (1946) decreed that a "centre of social action and studies be established in each province…staffed by experts and sufficiently subsidised so that it is truly capable of explaining and fostering the social apostolate and providing initiative and direction to the social action of Ours,"[29] a clear strategy for the social apostolate was set.

For the Society, choice of ministries is at the heart of the strategic process. Ignatius' six criteria - greater service of God and the more universal good, where greater fruit will probably be reaped, where our indebtedness is greater, preference to those who can become a cause which can spread the good, spiritual aid to important and public

[28] GC 8, Decree 8. *For Matters of Greater Moment: The First Thirty Jesuit General Congregations, A Brief History and a Translation of the Decrees,* John Padberg, Martin O'Keefe & John McCarthy (Eds.) Institute of Jesuits Sources: St Louis, MO, 1994, p. 283.
[29] GC 29, Decree 29, *For Matters of Greater Moment*, p. 639

persons, and where the enemy of Christ has sown cockle [30] - define an attitude to adopt when confronted with competing values, limitations of manpower and a desire to follow what is more appropriate for the Society.[31]

Provinces or apostolates may adopt more specific criteria in their own contexts. In the Irish Province's plan, *Our Mission in Ireland* (1985), the following criteria were articulated for social apostolates.

1. A change in what is influencing a large number of people is to be preferred to a change in what is affecting a few.
2. A small change brought about by people themselves on their own behalf is to be preferred to a large change imposed on them by someone else.
3. A change for the better in a depressed urban or rural area (or in the life of a deprived social group) is to be preferred to a change in sought-after residential areas or prosperous rural areas or advantaged socio-economic groups.
4. A change in the attitudes or lifestyle of the advantaged socio-economic groups is to be preferred to isolated actions for them.
5. An objective that enables the Society to be seen as not only for the poor but poor herself is to be preferred to an objective that does not.
6. A work that is seen to be growing directly from the social force of the Gospel is preferred to one that is doing so only implicitly.

PROCESS OF CREATING A PROVINCE PLAN[32]

Having seen what strategic planning is and what its elements are for the Society, I will now outline the steps required to move from criteria to action. The strategy process has essentially four major steps: (1) strategic analysis, (2) strategy making, and (3) developing the strategic plan and (4) implementation and review.[33] (Figure 3-2)

[Figure 3-2 about here]

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[30] CONS, 622

[31] "The Kamikaze Factor: Choosing Jesuit Ministries". Joseph Conwell*, Studies in the Spirituality of Jesuits,* Vol. XI, 1979, No. 5. "Ignatian Criteria for the Choice of Ministries", Joseph Veale, *The Way Supplement*, 55, Spring 1986, pp. 77-88.

[32] While this discussion focusses on the process of creating a province plan, readers may note that an apostolate would take the same steps.

[33] *Integrated Strategic Change,* Christopher G. Worley, David E. Hitchin, & Walter L. Ross, Addison-Wesley: Reading, MA, 1996

Strategic Analysis

Strategic analysis begins with an analysis of the perceived or experienced need for change. When GC 31 acknowledged that "the hard work that our Society puts into its apostolic ministries...[has]…not produced all the results we could rightly expect, if one considers the proportion between effort and results achieved", it posed the question whether the failure was due to "our failure at times continually to renew our apostolic or missionary spirit and to maintain the union which the instrument should have with God, or our neglect of moderation in labours of soul and body or too great a scattering of our forces". The congregation answered its own question "the principal reason is our failure adequately to adapt our ministries to the changed conditions of our times".[34] That was written in the mid-sixties. If the question were asked today, what would the answer be?

An important part of strategic analysis pertains to the provincial's dispositions in relation to change. The provincial must decide how he is to approach to the strategy process.[35] Since a provincial has responsibility for the development of the province under his care, his own dispositions affect whether strategic planning and change take place. At a minimum, the provincial must be able to open the container and release the questions about the ministries in which the province is engaged. This typically involves the pain attached to discussing the undiscussable and questioning deeply established norms. At maximum, he must be able to evoke the desires of the members of the province for a new apostolic vision and lead them through a discernment of the

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[34] GC 31, Decree 21, "The Better Choice and Promotion of Ministries", # 360

[35] *Changing the Essence: The Art of Creating and Leading Fundamental Change in Organizations,* Richard Beckhard & Wendy Pritchard, Jossey-Bass: San Francisco, 1992

future of the province. These two, a minimum way to approach renewal and a maximum way, define two distinct approaches which will be dealt with below in the section, “Approaches to Strategy”.

At the outset of his provincialate, one provincial declared his intention to focus on strategy and strategic planning. In his exhortation to the communities on visitation during his first year, he said that it would be easy for him to devote his time to the administration of the province. That would certainly occupy his time. He saw his role in wider terms. The long-term future and apostolic thrust of the province was an issue to be faced in the present time. In this statement, the provincial was clearly taking ownership of the strategic function of his role. For the remainder of his term of office, he led from the front and used every opportunity - in letters and addresses to the province, visitation of the houses - to reinforce the planning process. He became clearly identified with the development of the province plan.

Another requirement of strategic analysis is the identification of some urgent or important issues facing the province. It could be the changing nature of society and therefore the need to adapt ministries to meet these changes. It could that the province is ageing and so it cannot continue to maintain its portfolio of ministries. In this instance, the strategic questions are around what ministries to develop, what to withdraw from and what to maintain.

Finally, strategic analysis requires the assessment of the province's current ministries. This means assessing the current state of each apostolate - what is does, what quality of relationships exists with non Jesuits, what Jesuit manpower is required and in what role, and so on.

Strategy Making

The first step in strategy making is the creation of a vision of the future. This is an articulation of what the province wants to look like in the future. It involves a clear

focus on the future - what needs to happen and why. But this is the big picture with which the members of the province can identify, can own and feel excited about and in the creation of which they want to play a part. In that respect, therefore, building participation in the province is critical.

There are tensions in this process. One is between a visionary, creative look at the future and a realistic view of the province's numbers and resources. Another may arise from conflicting visions of the future of the province, which members may see differently. These tensions have to be managed.

The outcome of these strategy making steps is a formulation of a strategic direction. This direction is grounded in the Constitutions and the recent general congregations as giving emphasis to direction. From the outside-in perspective it is aiming towards contemporary and future needs in the external environment. From the inside-out perspective it is realistic about the internal environment, especially the province's resources and strengths. While the direction may be formulated from the outside in or the inside out, the outside-in direction is more critical for apostolic mission of the Society.

Developing the Strategic Plan

Having established the strategic direction, the next task is to create the actual plan. A plan articulates who is to do what by when. Accordingly, it names the broader elements - the large tasks, the sequence of specific change activities, those responsible for particular actions and the time frames and so on.

One province plan, with respect to its educational apostolate, outlined four thrusts which were to receive priority in the province's schools. These were that each school was to develop: a) a vision statement, b) create a pastoral team to care for the faith, human development and social action of the whole school community, c) develop collaboration with teachers and parents, and d) create a catechetical cum social action programme. Over the years, each of the province's schools worked at implementing these thrusts and the provincial reviewed their progress.

Implementation and Review

The fourth and final steps in the strategic process are implementation and review. A provincial once remarked, "Now that I have my plan, I think my work is only beginning". Whatever the approach, planning still ends in the realm of intention - what is desired. What is desired still has to be achieved; plans have to be implemented. The critical task in implementation is making the vision real. The provincial must embody and live the strategic vision, set high expectations and champion the change. He reinforces behaviours in order to make the change survive.

APOSTOLIC REVIEW

An overemphasis on planning tends to neglect what is a more significant, namely review. Review is where plans are examined and progress monitored in order that important learning takes place.

Review may be perceived as a corporate apostolic examen, analogous to the individual examen.[36] The 33rd General Congregation perceived it that way and provided a comprehensive picture of apostolic review for Jesuits. (Figure 3-3)

[36] "Apostolic Review: Corporate Openness to the Spirit", David Coghlan, SJ, *Review for Religious,* Vol. 48, 1989, No. 4, pp. 553-560

> If we are to fulfil our mission, we must be faithful to that practice of communal apostolic discernment so central to "our way of proceeding", a practice rooted in the Exercises and Constitutions. This way of proceeding calls for a review of all our ministries, both traditional and new. Such a review includes: an attentiveness to the word of God; an examen and reflection inspired by the Ignatian tradition; a personal and communitarian conversion necessary in order to become "contemplatives in action"; an effort to live an indifference and availability that will enable us to find God in all things; and a transformation of our habitual patterns of thought through a constant interplay of experience, reflection and action...[37]

[Figure 3-3 about here]

The Congregation recognised that such a process requires specific dispositions in Jesuits for its application.

> But such an effort runs the risk of failure unless we attend to the practical conditions required for its serious application. These conditions, to be given special attention both in initial and ongoing formation, include: deeper involvement in the lives of people around us in order to hear "the joys and hopes, the griefs and the anxieties of the people of this age, especially those who are poor or in any way afflicted"; a regular exposure to new situations of life and thought which oblige us to question our way of seeing and judging; a gradual assimilation of that apostolic pedagogy of St. Ignatius; a well-informed use of social and cultural analysis; and an inculturation which opens us to the newness of Jesus the Saviour in the evolution of every people, and thereby prevents us from absolutizing our perceptions and actions.[38]

Review is a significant complement to planning and implementation for a couple of very important reasons. One is that what one provincial emphasises and encourages, his successor does not emphasise and encourages something else. While any province plan should not inhibit the work of any individual provincial, if the broad focus of the strategic plan has been adopted by the province, an incoming provincial will follow

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[37] GC 33, Decree 1, "Companions of Jesus Sent into Today's World", # 43

that. He may place different emphases or change the more specific details but the broad strategic direction may remain unaltered.

A second reason why review is significant is that the contingencies which emerge later in the process may change the plan. One province plan, for example, was based on a projected number of incoming novices each year. When that number was not being realised, some of the assumptions underlying the number of ministries in the province had to be questioned and a more realistic plan drawn up. And then there is the unexpected event. An individual Jesuit, on whom the implementation of a plan in a particular apostolate is built, may become ill or die unexpectedly. Or an illness or death in one apostolate may require the provincial to move a man to it from another apostolate where he has been important to strategic implementation. Clearly events may require contingency action, which emphasises the necessity of review in the strategy process.

The review process belongs to the action-reflection process and to ignatian spirituality and is aimed at facilitating learning from experience. Yet apostolic review can create a sense of guilt or defensiveness easily when there is an absence of an atmosphere of psychological security and openness. Accordingly, how review is structured is critical - when it takes place, and in what context and how much time it is afforded.

Having a procedure which facilitates a rhythm of review is more than useful. Hence a random review when the provincial comes on visitation may not facilitate the psychological space that an apostolic team may need in order to create the right

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[38] GC 33, Decree 1, “Companions of Jesus Sent into Today's World”, # 44

atmosphere and dispositions. Various rhythms have helped: some ministries meet at the end of the academic year to review the year. Others take time before the new academic year starts to plan the year ahead. In many instances, groups typically take a few days away from their houses so as to help create an uninterrupted atmosphere for sharing, discussion and prayerful reflection.

Review may be structured on three different levels in a province. First, there is the province level, where such bodies as the provincial and his staff, the province consult and perhaps a ministries commission engage in review of the whole province. The provincial's annual report to Father General provides a significant mechanism for a cohesive review of the province articulated through this level. Second, there is what might be termed the sector level, where like ministries are reviewed together, as for instance, education, comprising a province's educational ministry in secondary schools or its pastoral ministry in parishes. Third, there is the apostolate level, made up of individual works. Here, superiors, directors of works, and Jesuit and non Jesuit personnel engage in their own review.

For a provincial, reviewing ministries may be expressed through an annual review, which partially comes through the visitation and reports. In this review the provincial monitors the progress of the apostolate from year to year. On occasion, determined by an event such as the need to replace the director of a work, he make have to make a major review, where the apostolate is reviewed in greater depth or where even its continuation is examined.

APPROACHES TO STRATEGY

As movement into the future is unavoidable, it may be useful to note that strategy, strategic thinking and acting are also unavoidable. Just as doing nothing is actually doing something, having no strategy is itself a strategy!

There are many approaches to strategy and each has its own strengths and weaknesses.[39] Some approaches are formal and analytical. They rely on integrated decision-making, that is analysis, formal planning and clear leadership. Others are less formal and deliberately emphasise what emerges from past decisions, rather than deliberately attempting to shape the future. Every approach has its strengths and weaknesses, and ultimately what any provincial leadership needs to do is to assess what the most appropriate approach is for a particular province at a given time.

Two approaches are common in the Society's use of planning since GC 31. The first approach frequently referred to as the "grand design" approach, works from the premise of formally articulating a grand plan. Some provinces have followed this approach and worked at producing a comprehensive plan, which typically contains a chapter on Jesuit identity and mission, one which identifies key issues for ministry in the contemporary world, one on challenges to be faced by sections of the province, another on statistics on age and numbers, and another outlining concrete action plans. The provincial plays the leading role in the formulation and production of the plan. Then the plan is printed or published in a professional booklet and is promoted as the statement of who the province is and what it intends doing. The Irish Province

[39] *Strategy Safari*, Henry Mintzberg, Bruce Ahlastrand, & Joseph Lampel, Prentice-Hall: Englewood Cliffs, NJ, 1998.

published such a plan in 1985 called "Our Mission in Ireland"; the Missouri Province called its plan "A Time to Plant " in 1988.

This approach is a useful and valuable approach to take once certain process issues are taken into consideration. The key issue is the plan is created and formulated. If the members of the province are not ready for such a plan, then the emphasis must go into facilitating the kind of learning that needs to happen for the members to be able to plan for the future in faith and consolation. There are three dangers to avoid. First, the production of the plan can become more important than what is in it or what it is about. Second, a focus on producing the plan may create rigidity and inflexibility as once something is formulated in writing it can become fixed. Finally, a plan may be published before the province is ready for it. The publication of the plan may need to be delayed until it is both well-understood and accepted, and only after its implementation is already well under way. Publishing a plan too soon or when it is not sufficiently well-understood and accepted may fail to generate the intended inspiration and not only fail to be the unifying force to which it aspires, but in fact be divisive and lead to alienation.

The second of the two common approaches to strategy is the "incremental" approach, in which strategy is *emergent*, that is, it emerges out of the patterns of the past and becomes broad perspectives for the future. In this approach there is no grand plan; decisions are made in a sequential manner out what is happening and what has happened. Strategy emerges from the hundreds of decisions made every day. It is actualised particularly through the annual province status where individual Jesuits' missions are named and particular apostolates are seen to receive or lose manpower.

This approach is frequently referred to as "logical incrementalism" - there is a logic to the incremental decisions that are made. The difficulty is that is the logic can be hard to follow because incremental decisions can be disjointed, time-consuming and expensive in that resources may be invested in false starts or projects that don't turn out. When an organisation is in crisis it may not have the time to learn in a decentralised, incremental way.

This approach is also common in many provinces. Over the past thirty years, since the 31st General Congregation, provinces have sponsored very many different activities throughout the provinces of the Society. Provinces have put on renewal workshops on such topics as leadership, teambuilding, discernment and so on. Provinces have gathered as provincial congregations, province assemblies, and province community and apostolic discernments. Over this period provinces have accumulated a great deal of experience and learning at facilitating groups, spiritual direction and discernment. Provincials have decided to opt for one ministry over another, to withdraw from a ministry or to open a new one. These do not happen in terms of a grand plan, but emerge as the right thing to do at a specific time.

The citation from the Thirty-fourth General Congregation at the start of this chapter does not mandate any particular approach to strategy. In the ignatian tradition, whatever approach to strategic planning is adopted, must be "a process of reflection and evaluation inspired by the Ignatian tradition of spiritual discernment, in which the primary stress is on prayer and the effort to gain 'indifference', that is, an apostolic readiness for anything."[40].

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[40] GC 32, Decree 4, “Our Mission Today”, #72

CRITIQUING THE PLANNING PROCESS

Father General provided an overview of planning in the Society in an address to the congregation of provincials in 1990.[41] In this address he reminded the Society that it should not be content with simple inquiry but use planning as a genuine mechanism for discernment in the most genuine ignatian tradition. He critiqued the practice of province planning, pointing out a number of patterns he had observed. He noted the provinces have avoided making real choices, especially in the short term, which in his view is often the price to pay for unanimous support of the province for a plan. He warned that that province plans may lose credibility if discernment is not followed by persevering execution, if a provincial does not review regularly or if the publication of a plan effectively marks the end of a province's effort at discernment. He observed that Society rarely thinks of engaging in joint planning with diocesan clergy or other religious. In his view the Society had not escaped a certain provincialisation and that he thinks problems could be considered in a wider context.

It cannot be said that planning in the Society has been an unqualified success. Many provinces have embarked on province planning, produced a systematic plan for the province and published it in a booklet which was distributed to every member of the province, to find that it did not have its desired effect of uniting the province in a strategic direction. Other provinces made plans and did not follow them through. Provinces have not engaged in adequate review why a planning process was not as successful as intended and so little has been learned from the experience.

Yet how a province plan is developed or how review is done do not explain all planning problems.[42] Jesuits who are being critical of planning process may comment that "Nothing ever comes from these meetings" or “A decision has already been made so this meeting is a sham”. In these instances, these Jesuits may be pointing to what they see to be flaws in the system which they believe to be unchangeable. Yet they may feel that their perceptions are perceived to be undiscussible by those in authority, and so do not voice them. When such assumptions are not voiced and people act as if they are true, then a pattern of behaviour develops. The unarticulated assumptions are not only hidden, but the fact that they are hidden is also hidden. So people attend meetings and appear to participate in processes while hiding the fact that they are hiding their negative interpretations of what is happening. Provincials and those leading the change process suspect that this is the case but they do not show that they sense this. The end result is a complex pattern of hidden, undiscussible assumptions which inhibit dealing with the planning issues.

How would one attempt to uncover these hidden assumptions? To return to the example of the comment, “Nothing ever happens from these meetings”, the question to ask would be, "What in your judgement prevents anything happening out of these meetings?", the answer to which provides further insights into the patterns of hidden assumptions. A map of how this hidden thinking is created and how effective change is blocked can be developed and acted on so that members can get at what are untested assumptions about what they perceive to be unchangeable.

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41 “De Statu Societatis Iesu”, *Address of Father General to the Congregation of Provincials*, Loyola, September 1990.

42 This section is based on the work of Chris Argyris, particularly his book *Overcoming Organizational Defenses,* Allyn & Bacon: Boston, 1990.

In applying all this to the processes of strategic planning, the following questions might be posed.[43]

1. Are there any problems with the province planning process that you believe are critical but are not likely to be dealt with effectively?

2. What gets people in trouble when they deal with planning in the province?

3. If you could change one thing in the planning process, what would it be? How would you go about doing it? What would you predict would be the biggest barrier to overcome?

4. If you could hang on to or strengthen a particular feature of the planning process, what would it be? How would you go about doing it? What would you predict would be the biggest barrier to overcome?

5. Are there any undiscussible or discussible but unchangeable issues in this province? Are any of these related to planning?

CONCLUSIONS

The development and renewal of any province or apostolate hinges on how its leadership engages in strategic thinking and acting. Strategy is a qualitative mode of thinking and acting which focuses on making significant choices about moving into the future based on ignatian criteria for the choice of ministries. There are two approaches to developing a province plan used by the Society over the past thirty years. The first approach is the "grand design" approach in which a comprehensive province plan is produced. In this approach the critical issues are that the plan does

not become rigid and that the members of the province own it. The second common approach is the "incremental" approach in which the strategic direction emerges through the many decisions made over time. There is no grand plan, simply the emergence of a pattern through many particular decisions. Each of these approaches has its strengths and weaknesses. Ultimately, a provincial judges what approach best suits his province and would best serve the purpose of renewal. At the core of any Jesuit strategic process is review and discernment. This is the essence of "our way of proceeding" and integrally links the individual and the team levels (and the province and the Society levels). Assumptions underlying strategic planning and action, if not articulated and examined, may inhibit the progress of the plan through the province.

For provinces of the Society, the renewal of existing ministries and the choice of new ministries are strategic choices which are to be made in the light of the aim of the Society, the changing world to which we are sent as servants of Christ's mission, and the limitations of the Society's resources.

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[43] *Strategy Change and Defensive Routines,* Chris Argyris, Pitman: Marshfield, MA, 1985, pp. 136-137.

EXERCISE 3-1

STRATEGIC PLANNING EXERCISE FOR AN APOSTOLATE

[Adapted from Figure 3-1]

This process does not have to take place in one meeting. Indeed that may be impossible. The stages may be spread over time.

Stage 1 Basic Aim & Mission

Each takes time to write down a short statement listing the basic aim and mission of the apostolate. Each writes 3 specifying criteria for the apostolate in the form, A is to be preferred over B. These are shared and agreed.

Stage 2 External Assessment

Each reflects on the main changes and developments in the external world which concern the apostolate. This is something which needs to be done in advance of the meeting, so that it does not become a matter of group members voicing their favourite opinions. Rather this stage needs to be based on solid research and evidence, usually from those bodies which articulate socio-economic, religious trends, etc. Then the members of the group ask

What are the main opportunities?
What are the main threats?

Each writes 3 main opportunities and 3 main threats. These are shared and agreed.

Stage 3 Internal Assessment

The group examines the internal context and discusses the following sorts of questions. What are our resources - physical, financial, human…? When we review what we are doing in this apostolate and how we are doing it, what are we proud of? What are we sorry about?

Stage 4 Planning

How do we match our external assessment with our internal assessment in terms of our mission and basic aims to shape what we are going to do over the coming 3-5 years?

EXERCISE 3-2
STRATEGIC PLANNING PROCESS FOR A PROVINCIAL

[Developed from Figure 3-2]

Strategic Analysis

The provincial reflects on the following questions

What is the need for change?

What am I prepared to do? Am I prepared to embark on a transformation of the province or rather to focus on adjusting the province's life and ministries within its existing frames of reference?

What approach will I adopt? Will I go for a comprehensive plan, review the whole province and engage it in reflecting on its experience, creating vision and so on? Or will I work incrementally and gradually move the province from A to B in a piecemeal manner?

What are the core issues facing the province? Externally in terms of changing socio-economic religious needs. Internally in terms of ageing, realigning ministries to reflect the contemporary situation? What are the pressing issues, those which cannot be delayed?

What are the barriers I expect to encounter?

What resources do I have - consultors, ministries commission, superiors etc?

Strategy Making

Where do we want the province to be in the year X?

How do I manage the scope of vision of the future with the limits of the reality of the present?

How do I build vision, commitment, and energy in the province for change?

What kinds of changes are required - adjustments, radical changes?

Developing the Strategic Plan

Who is going to do what by when?

Who are the useful formulators of the plan?

Who are the important implementers?

What are short term. medium, long term issues and goals?

Implementation & Review

How do I reinforce the change?

What review processes can I set in place?

NOTES

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CHAPTER 4

AN IGNATIAN APPROACH TO CONSULTATION AND FACILITATION

In many situations where learning or changing is involved, individuals, groups and organisations utilise some forms of external professional help.[44] An individual might attend a therapist as part of attempting to make a change in his life. Jesuits utilise spiritual direction as a means of finding God in their life. Superiors and directors of works may seek legal or financial expertise. In this chapter I explore an ignatian perspective on the dispositions and actions of those in the helping role.

THE HELPING ROLE IN THE SPIRITUAL EXERCISES

In the *Spiritual Exercises,* Ignatius prescribes how the one directing the Exercises should behave towards the exercitant.

> To assure better cooperation between the one who is giving the Exercises and the exercitant, and more beneficial results for both, it is necessary to suppose that every good Christian is more ready to put a good interpretation on another's statement than to condemn it as false. If an orthodox construction cannot be put on a proposition, the one who made it should be asked how he understands it. If he is in error, he should be corrected with all kindness. If this does not suffice, all appropriate means should be used to bring him to a correct interpretation, and so defend the proposition from error.[45]

Ignatius prescribes that the central disposition for the one in the directing role is that of assuming the good intentions in the other. Accordingly, the director first listens

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[44] *Renewing Apostolic Religious Life*, Chapter 9
[45] SpEx # 22

actively to the experience of the exercitant and then enquires into that experience. The action of listening enables the exercitant to feel supported in his experience and the action of enquiring enables reflection. Ignatius also indicates that in some situations the one directing may confront what he perceives to be persistent error. In more contemporary terms, error might also include inconsistencies in behaviour, thought processes, assumptions and between words and behaviour.

In the Introductory Observations, Ignatius provides more detail as to how the one directing the Exercises can help the exercitant.

The one directing the Exercises enables the exercitant to reflect on experience.

> The one who explains to another the method or order of meditating or contemplating should narrate accurately the facts of the contemplation or meditation. Let him adhere to the points, and add only a short of summary explanation. The reason for this is that when one in meditating takes the solid foundation of facts and goes over it and reflects on its for himself, he may find something that makes them a little clearer or better understood. This may arise form his own reasoning or from the grace of God enlightening his mind. Now this produces greater spiritual relish and fruit than if the one giving the Exercises had explained and the developed the meaning at great length. For it is not so much knowledge that fills and satisfied the soul, but the intimate understanding and relish of the truth.[46]

The one directing the Exercises enquires into the experience of the exercitant.

> When the one who is giving the Exercises perceives that the exercitant is not affected by any spiritual experiences, such as consolations or desolations, and that he is not troubled by different spirits, he ought to ply him with questions about the exercises.[47]

The one directing the Exercises is supportive toward the exercitant.

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[46] SpEx, "Introductory Observations", #2
[47] SpEx, "Introductory Observations", #6

> If the director of the Exercises observes that the exercitant is in desolation and tempted let him not deal with him severely and harshly with him, but gently and kindly. He should encourage and strengthen him for the future by exposing to him the wiles of the enemy of our human nature, and by getting him to prepare and dispose himself for the coming consolation.[48]

The one directing the Exercises may engage in some teaching though only when it is of use to the exercitant.

> If the one who is giving the Exercises should perceive from desolation, from the wiles of the enemy, and from consolation that the exercitant has need of them, he should explain to him the rules of the First and of the Second Week for the understanding of different spirits.[49]

> When the one who is giving the Exercises perceives that the exercitant is being assailed and tempted under the appearance of good, then is the proper time to explain to him the rules of the Second Week.[50]

At the same time the one directing the Exercises should refrain from teaching when it does not serve the exercitant.

> It should be observed that when the exercitant is engaged in the Exercises of the First Week, if he is a person unskilled in spiritual things, and if he is tempted grossly and openly, for example… the one who is giving the Exercises should not explain to him the rules about different spirits that refer to the Second Week. For while the rules of the First Week will be very helpful to him, those of the Second Week will be harmful, since they deal with matter that is too subtle and advanced for him to understand.[51]

The one directing the Exercises may confront the exercitant when he sees the exercitant going down a path which may not be helpful to the exercitant.

> If the one who is giving the Exercises sees that the exercitant is going on in consolation and in great fervour, he must admonish him not to be inconsiderate or hasty in making any promise or vow.[52]

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[48] SpEx, “Introductory Observations”, #7
[49] SpEx, “Introductory Observations”, #8
[50] SpEx, “Introductory Observations”, #10
[51] SpEx, “Introductory Observations”, #9
[52] SpEx, “Introductory Observations”, #14

A critical disposition for the one giving the Exercises is that he be self-aware and not interfere in the direct relationship of God and the exercitant.

> The director of the Exercises ought not to urge the exercitant more to poverty or any promise than to the contrary, nor anyone state of life or way of living more than to another. Outside the Exercises, it is true, we may lawfully and meritoriously urge all who probably have the required fitness to choose, continence, virginity, the religious life and every form of spiritual perfection. But while one is engaged in the Spiritual Exercises, it is more suitable and much better that the Creator and Lord in person communicate Himself to the devout soul in quest of the divine will, that He inflame it with His love and praise, and dispose it for the way in which it could better serve God in the future. Therefore, the director of the Exercises, as a balance at equilibrium, should permit the Creator to deal directly with the creature and the creature directly with his Creator and Lord.[53]

In summary, it can be seen that Ignatius created a sophisticated methodology for those who direct the Exercises which emphasises self-knowledge, a positive disposition toward the exercitant, and process skills in active listening, enquiry, and a trained and selective use of teaching and confrontation. While this methodology pertains specifically to the context of the Spiritual Exercises and the discernment of spirits, it can be broadened and applied as well to consultation and facilitation.

PROCESS CONSULTATION

Seeking and using professional help takes more than one form. It formal or informal; it can involve seeking expert advice or being helped to decide for oneself. When we go to the doctor, for instance, we present symptoms, and the doctor (as expert) diagnoses and prescribes a remedy, which we then implement. In other instances, we purchase the skills of the expert, as when we take a car to the garage for servicing or

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[53] SpEx, “Introductory Observations”, #15

hire an electrician to mend an electrical fault. In these cases, the expert does the job. Both of these approaches are based on the technical expertise of professional.

Carl Rogers transformed the helping role by focusing, not on the expertise of the counsellor, but on the quality of the relationship between counsellor and client. He characterised this relationship in terms of empathy, unconditional positive regard and congruence, and thereby set the conditions whereby clients could solve their own problems. In describing the characteristics of a helping relationship, he invited those in the helping role to face certain questions about their own dispositions. These dispositions relate to the ability to build trust, to allow oneself experience positive feelings towards the other, to be strong enough to allow the other freedom, to be able to enter the world of the other and see things as he or she does, to be free from external evaluation and to allow the other person to be in the process of becoming.[54] Rogers revolutionised the helping process by affirming the client's autonomy, over against the power which had been attributed to the expert. He consequently had a major influence on counselling, therapy and spiritual direction with individuals.

Rogers' legacy is that there is an alternative approach to helping which is not based on the technical expertise of a professional. This approach can be defined in terms of helping people help themselves by (a) creating the conditions whereby clients can examine the pertinent issue and come to their own resolutions, and (b) responding in such a manner that they can surface the relevant information, make free choices and therefore be committed to what they choose.[55]

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[54] "The Characteristics of a Helping Relationship", Carl Rogers. In H. Kirschenbaum, & V. Henderson, (Eds.) *The Carl Rogers Reader,* Constable: London, 1990

[55] *Intervention Theory and Method*, Chris Argyris, Addison-Wesley: Reading, MA, 1970

Process consultation, which primarily focuses on helping organisations, can be viewed as an organisational equivalent to Rogers' therapeutic approach.[56] [57] Those using process consultation help clients enquire into their experience, develop their own understanding of what is happening and create their own solution. It is easy to see that the process consultation model is in direct contrast with traditional consultation models. These models are based on the consultants' expertise in particular areas whom the client consults for advice and/or expert problem-solving. The process consultation approach, in contrast, is based on experts building effective helping relationships and working jointly with clients so that the clients can solve their own problems. Finally, process consultants pass on their skills to their clients so that clients can become process consultants in their own organisations by learning to help their colleagues see what is happening, understand why it is happening and help build and implement solutions.

Those applying process consultation typically find that emerging issues can be categorised under several headings. Two fundamental categories are content (what is to be done) and process (how is it to be done) issues. For instance, in working with a team consultants may find that its members have differing interpretations of what its mandate is or that a meeting has an unclear agenda. These are content issues. On the other hand, they may find that there are problems arising out of how the team goes about its work – ineffective management of its meeting, for example. This is a process issue. Those in the helping role may work to help clarify and resolve content and

[56] The notion of process consultation is the creation of Edgar Schein and described in his book, *Process Consultation Revisited: Building the Helping Relationship,* Addison-Wesley: Reading, MA, 1999*,* (earlier editions, 1969, 1987, 1988)

process issues. They may also identify issues to do with the task at hand (what is to be decided, how it is to be decided) or with interpersonal relations, (how group members communicate with one another, make decisions, solve problems, manage disagreements and so on). In summary, those working in a process consultation approach may utilise a matrix of content and process, relating to task and interpersonal issues, in perceiving issues and formulating the basis for interventions.

Intervention is whatever the one in the helping role does in order to help. An intervention may be asking questions, giving advice, structuring a meeting, providing emotional support, even being silent. Some interventions are on a grand scale, like designing and implementing a planning process, while others may be more specific to a particular moment, like asking a question. Examples of interventions by the one directing the Spiritual Exercises can be seen in the citations from the Introductory Observations cited above: "ply with questions, encourage and strengthen, explain the rules" and so on.

THE HELPING ROLE IN IGNATIAN PROCESS CONSULTATION

The insights of Rogers and of the process consultation approach can be integrated with those of Ignatius to create an ignatian process consultation approach. All consultants working in a process consultation approach, facilitate enquiry and action into content issues – What do you want? What is your plan? - and enquiry and action into process issues – How are you deciding what to do? Consultants working in an ignatian process consultation approach bring an awareness, sensitivity and skills in

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[57] "Process Consultation and the Person-Centered Approach: Schein and Rogers on the Helping

attending to the movements of the Spirit in those engaged in the tasks of renewal and change. They facilitate the discernment of spirits and the identification of moments of consolation and desolation.

In a consultation session with a newly appointed provincial team of a congregation of sisters, I assigned a time of individual prayer in which each individual member of the team would get in touch with her desires for the province over the council's term of office in the presence of God. On their return to the group I invited them to share as they saw fit. Each one shared her vision of how the province could develop over few years. We then spent time reflecting on what had been shared and seeing what was emerging as common. As the group discussed the common features of the individuals' desires and visions, a note of despondency crept into the conversation. As issues of the present reality of the province began to surface, such as ageing and resistance to change, the council members' feelings of inadequacy in fulfilling their desires began to take over. Sensing that the group was slipping into desolation, I sent the members back to individual prayer with the instruction to stay with the blockage in the presence of God. When the group re-assembled, each one shared a powerful personal experience of God's reassuring grace. The positive energy of the group returned and a process of strategic planning and change was initiated.

We reflected on what had happened and noted how desolation had crept into the group and a bad spirit of despondency and inadequacy had taken over. While the good spirit of consolation which emerged later provided positive energy, it did not diminish the seriousness of the issues facing the council. Rather, it provided the members with a sense of God's grace in their ministry of leadership. Over the following few years, the council initiated and led the province's ownership of the closure of a school and the re-focusing of priorities on the option for the poor.

The story in the box above is an instance of how a consultant-facilitator can work in an ignatian manner in the adaptive coping cycle described in Chapter 2. In this case which refers to one particular meeting, the members of the provincial council had sensed the need for change; they were building on the work of their predecessors and were quite aware of the need for change. They knew that it was their responsibility and mandate to process the information and act on it. It was when they attempted to articulate what the information meant and what they would need to do that the desolation of anxiety and despondency became evident. My intervention to name and confront that spirit of despondency was grounded in my attention to outcome of the members' individual prayer time and the mood of the group which shifted during the

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Process", D. Coghlan, & E. McIlduff, *Organization Development Journal*, Vol. 13, 1995, No. 3, 45-56

sharing. By focusing on the desolation which was evident in the group, I facilitated a return to prayer and a graced renewal of the call to leadership which had been present earlier. This renewed grace enabled the group to refocus on the task and strengthen the group's process to address the important strategic issues facing the province. At this meeting the agenda was general in that it was not focusing on any particular issue. It was at later meetings that specific agendas emerged and strategic planning actions were identified and implemented. The ignatian process consultation approach facilitated both the apostolic work of the provincial council and its members' sense of God's active presence in that work.

CONCLUSIONS

Ignatius articulated a sophisticated approach to being present to another person in the Spiritual Exercises. He placed a central emphasis on listening, rather than on teaching which is central to the "guru" approach. From his own experience, he articulated how the different spirits can influence the exercitant at different stages of the Exercises and evolved ways of recognising the movements of those spirits.

Ignatius' approach anticipated later developments in therapy and had a major influence on spiritual direction. His approach can also be extrapolated to those helping situations involving the renewal of apostolic groups and organisations.

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PART II

ORGANISATION DEVELOPMENT

CHAPTER 5

ORGANISATION DEVELOPMENT AND CHANGE

The literature on how planned change is introduced into human systems - such as social movements, education, psychotherapy, organisational change – shows that the strategies can be summarised into a number of approaches.[58] This chapter introduces one of them: organisation development, an approach to managing change which goes beyond rational prescription and addresses the participation of the members of an organisation. Its application to the Society will be developed in Chapters 6 and 7.

THE NORMATIVE RE-EDUCATIVE APPROACH TO ORGANISATIONAL CHANGE

The normative re-educative approach to change places an emphasis on the developmental and social nature of the human person. In such an approach, the change process is viewed in the context of culture and the groups with which individuals identify, and it is seen as involving attitudes, values and behaviours, as well as knowledge. Changes such as these will necessarily involve a realignment of significant relationships and will pay attention to the forces which promote and impede change. Change involves "unlearning" old attitudes and behaviours and "relearning" new ones. For instance, people's fears and anxieties, their perceptions, the membership of groups, the norms and culture of those groups are significant forces in

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[58] "Strategies for Effecting Change in Human Systems", Robert Chin & Ken Benne. In W. Bennis, K. Benne, & R, Chin, (Eds.) *The Planning of Change,* 2nd edition, Holt, Rinehart & Winston: New York, 1969.

whether a change is accepted or resisted. This normative re-educative approach focuses on people's abilities to solve their own problems. So there is an emphasis on experience-based learning and skills development so that individuals can make the changes themselves in line with the issues which they identify as significant.

The normative re-educative approach is contrasted with the empirical-rational approach which assumes that people act on the basis of rationality, so its approach to change focuses on generating supporting evidence, argument and persuasion. It is also contrasted with the power-coercive approach which views change in terms of the exercise of authority and power and the use of sanction and punishment.

ORGANISATION DEVELOPMENT

Organisation development (regularly abbreviated as OD) is an applied behavioural science approach to the management of planned organisational change. Its theoretical base is grounded in the social sciences. It draws on such fields as: social psychology, individual psychology, psychotherapy, group processes, theories of participative management and organisational theory.[59] It is not always easy to explain what organisation development is because the field is still being shaped by its practitioners and theorists.

Organisation development views organisations as complex social systems and focuses on change in the total system. By system is meant an arrangement of interrelated and inter-dependent parts, within which events and incidents must be viewed in terms of

the total system, on the grounds that a change in one part of the system will have effects in other parts. We saw an example of this in Chapter 1 when we saw that the individual, the team/community, the province and the Society are integrally inter-related and inter-dependent. Organisation development aims to expands people's ideas, beliefs, attitudes and behaviours, so that they can contribute to the resolution of problems and the development of solutions. A significant aspect of organisation development is that it is strategic and long-term in its focus.

Organisation development is an approach to planned organisational change which focuses on culture (values, beliefs and assumptions) and processes (how things are done). It specifically encourages collaboration between organisational leaders and members in managing the change process. It recognises that teams and groups are particularly important for the achievement of tasks and therefore targets them immediately for intervention. In organisation development, if there are external consultants, they act as facilitators and co-learners with the members of the system, rather than as experts who solve problems.

Organisation development is both an underlying philosophy of change and a whole range of techniques. As a philosophy it is grounded in several normative re-educative assumptions: (a) that change involves unlearning attitudes and habits which are already well imbedded and integrated in existing behaviours and social relationships; (b) that change will not take place unless there is some motivation to change and that creating the motivation to change is often the most difficult part of the change process; and (c) that while it is the individual who ultimately changes and mediates

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[59] *Organization Development: Behavioral Science Interventions for Organizational Improvement,*

change in an organisation, the groups to which individuals belong and with which they identify are the key focus and agents of change. Organisation development relies on the model of action research whereby consultants and the members of the organisation reflect on the experience and take action in the light of the change process as it unfolds.

ACTION RESEARCH AND ORGANISATION DEVELOPMENT

Action research is one of the cornerstones of organisation development. While the term, action research, can be applied to many forms of research, it always means that the participants in a social system are involved in collecting data about themselves, using the data to take some remedial or developmental action and at the same time generating an understanding of what is taking place.[60] In short, action research may be defined as the application of the scientific method of fact-finding and experimentation to practical problems, requiring planning, action and review and involving the co-operation of social scientists and participants. (Figure 5-1) The outcomes are solutions to practical problems and a contribution to scientific knowledge.

[Figure 5-1 about here]

Action research is based on the assumptions that action should follow research and that research should follow action. In other words, in the real world action should follow on from systematic analysis and that action should be evaluated. Systematic analysis means going beyond an anecdotal account of who-said-what etc. to

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Wendell French & Cecil Bell, Prentice-Hall: Englewood Cliffs, NJ, 6th edition, 1999.

formulating some sort of understanding of what is happening, however tentative that understanding may be. This involves the application of frameworks and models of organisational dynamics, individual and group behaviour and so on to situations with the purpose of formulating tentative hypotheses in order to plan and take action.

Organisation development grew out of action research, particularly out of an approach to learning in small groups which took place by the individuals attending to the here-and-now situation which was occurring in the group. This was an insight which the eminent social psychologist Kurt Lewin got and which his colleagues developed by setting up unstructured group situations which had the aim of helping the participants learn about groups. In these groups (called T-groups, T standing for training) the emphasis was on participants acting as the active agents of their own change by participating in the group, reflecting on what was happening, understanding their experience in the light of behavioural science constructs and then attempting to adapt their behaviour to accord with their insights about themselves. The trainer's non-directive, facilitative role enabled the participants to take control of their own learning. (Later in the 1960s, the insights of the T-group were adopted by Carl Rogers and the emphasis was shifted to focus on the individual's personal development. Thus sensitivity groups were created.) However, in the T-group the emphasis was on the development of group-skills. It was when the core insights of the T-group were developed to deal with issues of decision-making and problem solving in task-oriented teams and larger systems that organisation development emerged. In organisation development, the consultant works in a facilitative manner enabling the members of the organisation do their own analysis of what their problems are, create

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[60] *The Clinical Perspective in Fieldwork*, Edgar H. Schein, Sage: Thousand Oaks, CA. 1987

their own solutions to these problems, implement their solutions and reflect on the consequences, both intended and unintended.

It is interesting to note that the group work in which Jesuits engage whereby they may share their experiences, thoughts and feelings in an apostolic team or community as an integral part of group and community decision making, has its origins in Lewin's work in social psychology, and not Rogers' encounter groups as is frequently misunderstood. It is also interesting to note that this form of group work is also the way the Society was founded. The early companions met to reflect on their experience and discern the way forward. When Jesuits engage in working in groups and teams, they do so in the context of searching for a way forward. In such a context individual sharing is relevant to support the task of the group, rather than an end in itself.

Organisation development itself is the fruit of action research - a philosophy of how to be helpful to client systems by working with them to understand what is going on and how to help change happen. Each step in the change process, each intervention creates new information which must be understood and applied to deciding what the next step might be, and so on. Through OD an organisation is not only changing but also learning about change and learning to learn about change.

UNDERSTANDING THE CHANGE PROCESS

We know from experience that changing customs and habits of thought and behaviour is difficult. In many respects it is easier to learn something new than to re-adapt one's habitual behaviour in order to learn new ones. Changing habits is

equivalent to re-education: something has to be unlearned before it can be replaced by new attitudes or behaviours. How all this happens is what the eminent social psychologist, Kurt Lewin, spent a great deal of his life studying.[61]

One of Lewin's most famous research projects was aimed at changing meat eating habits in Iowa during the second world war.[62] Because there were meat shortages due to the war, people had to be re-educated to value and therefore buy and eat, what we could know to be the lesser cuts of meat - kidney, liver, heart and so on. People resisted this as they were not used to these meats and had an aversion to eating them. As housewives were the ones who bought the food and essentially had the major influence on what families ate, they were targeted as the ones who could be the vehicle for change. The research took the form of establishing two sets of three groups of women. One set was given lectures and information leaflets on the nutritional value of the lesser cuts of meat, the need to support the war effort and ways of how to make prepare these dishes in an attractive manner. The other set engaged in a discussion of the food provision problems the housewives faced, the general problem of change in family food habits and the particular problems that would be entailed in getting their families to accept this meat. Only after interest had been expressed and towards the end of the discussion were recipes and preparation methods offered. The women were then asked how many would be interested in trying to serve these meats, and subsequently set their own ways of trying it out. Some months later it was found that there was a much higher proportion of change in the families in which the women had

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[61] "Conduct, Knowledge and the Acceptance of New Values", Kurt Lewin & Paul Grabbe. In K. Lewin, *Resolving Social Conflicts: Selected Papers on Group Dynamics,* (Ed. G. Lewin) Souvenir Press: London, 1973.

[62] "Group Decision and Social Change", Kurt Lewin. In E. Maccoby, T. Newcomb, & E. Hartley, *Readings in Social Psychology,* Methuen: London, 1966.

participated in the discussion groups and much less change in those who had been given the lectures.

Lewin reflected on these experiments and noted that the lectures to put pressure on the women to change their attitude to meat did not create change, while the group discussions allowed the women to voice their own concerns and reduce their fears. He generalised from this reflection to establish the principle that forces which drive change tend to create opposing restraining forces. Accordingly, efforts to help reduce resistance tend to be more productive. This process of focusing on reducing fears and anxieties has been developed from Lewin's research into an organisation development intervention technique called *force field analysis*. (cf. Exercise 5-1 at the end of this chapter).

Lewin's description of the change process came from the Iowa studies and became formulated as his famous theory of change. In Lewin's view, there are three stages of a change process: becoming open to the need for change (which Lewin called "unfreezing"), changing to a changed state (which Lewin called "moving"), and reinforcing and stabilising the change (which Lewin called "refreezing").

Unfreezing

In this stage, the motivation to change is created. There are typically four sources of unfreezing.[63] A common source is an experience of pain or dissatisfaction with a present situation, so the driving force for change can be a desire for relief. Then, the

dissatisfaction can be from a perceived discrepancy between what is and what ought to be. Again, external pressures can move to change. Finally, the move to change can arise from the internal thrust towards wholeness or health.

Lewin's three stages have been developed by specifying the dynamics which occur at each stage.[64] Unfreezing, for instance, happens only when three dynamics co-exist.

i) Present behaviour or attitudes must be disconfirmed. Disconfirmed means that expectations are not realised.

ii) The disconfirmation must arouse sufficient anxiety or guilt to move the person effectively to change.

iii) Sufficient "psychological safety" must make it unnecessary for the target individuals or teams to psychologically defend themselves.

The unfreezing process is painful and generates a number of specific psychological responses such as denying the need for change or trying to dodge change.[65] When experience is disconfirmed the initial reaction is to deny the relevance of the disconfirming information. When the evidence supporting change is irrefutable, then change can be dodged. People say things like, "Others have to change, but not me" or "This change is just a fad; it will go away". Effective unfreezing involves a recognition of the need for change in such a form that there is a balance of the pain of

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63 *The Dynamics of Planned Change*, R. Lippitt, J. Watson & B. Westley, Harcourt, Brace & World: New York, 1958.

64 This development of Lewin's change theory is taken from the work of Edgar Schein whose seminal research was into the brainwashing approaches used by the Chinese on US American soldiers during the Korean war. cf *Coercive Persuasion*, E.H. Schein, Norton: New York, 1960. The organisational application of Lewin's theory is found in *Organizational Psychology,* E.H. Schein, 3rd edition, Prentice-Hall: Englewood Cliffs, NJ., 1980.

65 *Renewing Apostolic Religious Life*, Ch.4

the disconfirmation with the assurance that change is possible and can be undertaken with some personal safety.

There may be a time delay between disconfirmation and a sense of psychological safety. An individual may perceive the need for change and feel the need to do something about it, but may not feel secure enough to act at the moment. The unfreezing process, in fact, may take a considerable amount of time and energy, but it is essential if any change is to take place. When there is a lack of attention to unfreezing, i.e., when the motivation and desire for change is neglected, then there is typically coercion for change. Those who are "unfrozen" pressurise those who are not. This increases resistance. While resistance is an inherent element in change, forces that increase resistance are unhelpful. They generate energy into issues that are not central to the change.

Unhappily, organisations typically neglect creating psychological safety in the unfreezing process. Disconfirmation is prevalent; it is always easy to show what is wrong and what needs improving or changing. It is relatively easy to create sufficient guilt or anxiety about the consequences of not changing. But if organisations are to learn how to learn and to change often (as they need to do in the contemporary world), they need to be able to speed up the process, and not get bogged down in the anxieties which inhibit learning and change and which tend to be increased when there is an emphasis on disconfirmation and the consequences of not changing.[66] Accordingly, creating psychological safety and reducing the debilitating elements of anxiety are critical.

We can notice here that there is a form of anxiety which arouses us to action, because we know that if we do not act we will fail to achieve our goals or ideals.[67] There is also an anxiety which paralyses or causes us to act defensively because to acknowledge that anxiety exists is to admit that something is wrong and we lose our self-esteem. So the creation of a the sense of the psychological safety which enables us to deal with the anxiety which mobilises action is important.

Changing

The second stage of Lewin's three stages is the "moving/changing" stage. This is the stage most commonly thought of as the change process. Here, the focus is a) on developing alternatives to the old situation through generating new information and new ways of looking at the old situation, and b) on experimenting and implementing new solutions. Changing is helped by two mechanisms. One is the process of identification, whereby change occurs through help from another person's point of view and using that person as a role model for one's own behaviour. This is the change approach inherent through the use of a consultant, therapist, spiritual director, mentor or friend. The other mechanism is the process of scanning multiple sources of information relevant to one's particular problems and selecting appropriate solutions from these sources. Unless there is already real motivation to change, these activities will be fruitless exercises.

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[66] "How Can Organizations Learn Faster? The Challenge of Entering the Green Room", Edgar H. Schein, *Sloan Management Review*, Winter 1993, pp. 85-92.

Refreezing

The third stage, "refreezing", is equally critical to change. It involves stabilising the new normative pattern of behaviour. Many individuals, groups and organisations undergo a change process only to revert to the old pattern some time later. This third stage aims at integrating the change into the new pattern so that it survives. The refreezing stage is defined in terms of the change's integration into the normative pattern of behaviour. It requires conscious management, typically in the form of institutionalisation processes. Two dynamics are essential. One is that the changed state must be experienced as fitting the self-concept, that is to say, that identity now includes the changed state. Recovering alcoholics introduce themselves as alcoholics and know their vulnerability to alcohol addiction as part of their identity. The second dynamic of refreezing is that there are some forms of social support, whereby maintaining the new behaviour is reinforced and rewarded. To continue the alcoholic example, the alcoholic's refreezing is dependent on the support of family and friends, and particularly, Alcoholics Anonymous. This new state remains in a semi-permanent position till it is unfrozen by new requirements for change.

Lewin's three-stage theory of change has provided the foundation of much of the change theory underlying organisation development.[68] We have seen that change involves a recognition of a need for change, a movement to a new state and a reinforcement of that changed state. We have also seen that change is an integrated process of attitudes, values and behaviours, not only by individuals on their own, but

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[67] "Kurt Lewin's Change Theory in the Field and in the Classroom: Notes toward a Model of Managed Learning", Edgar H. Schein, *Systems Practice,* Vol. 9, 1996, No. 1, pp. 27-48.
[68] "Change as Re-education: Lewin Revisited", David Coghlan, *Organization Development Journal,* Vol. 12, 1994, No. 4, pp. 1-8.

also as members of groups whose norms and cultures help shape their perspective and attitude to change. This is called the normative re-educative approach.

CONCLUSIONS

I have introduced organisation development as a facilitative model of helping organisations manage their own change. The theories underlying organisation development focus on the complexity of the change process - how change involves a recognition that change is required and an unlearning of current ways of thinking, values and behaviours. The practice of organisation development emphasises the action research nature of process consultation in helping change happen - working with how things are, facilitating learning and taking action out of a joint understanding of what would be useful to do next.

The Society’s way of proceeding contains the essential features of organisation development. Organisation development’s normative re-educative approach emphasises how people learn and change, how decisions are made, and the function of groups as key to organisational change. This accords well with the Society's way of proceeding, both individual discernment and apostolic discernment in common. The ignatian approach places a great emphasis on process, whereby decisions are made on the basis of core criteria and reflection on action is taken in the light of the effects of that action, with flexibility for alternatives built in. Organisation development places an equal emphasis on process. I believe that Ignatius would recognise his own approach to the Society in many of the tenets of organisation development.

EXERCISE 5-1

FORCE FIELD ANALYSIS

Force field is a technique created by Kurt Lewin for problem solving or managing change. It is based on the assumptions that in every situation there are forces driving change and forces restraining change, and that an emphasis on reducing restraining forces is more effective than increasing driving forces. While a force field might look like what we might do in listing reasons for and against taking an action, it is actually quite different. Reasons for and against are static and rational; they have to be justified. In force field analysis, forces impinging on a situation are listed. These can be rational or irrational. Fear or apathy, while they might be perceived to be irrational, may be real forces acting on a situation and so they have to be considered. This method is very practical and useful in a group setting.

Step 1. Describe the change issue and the desired direction of the change.

Step 2. List the forces driving change and those restraining in a diagram which has the forces in opposition to one another.

Step 3. Give a weighting to the forces, those that are stronger and more powerful than others.

Step 4. Focus on the restraining forces and assess which of the significant ones need to be worked on and can be worked on.

Step 5. Develop plans for reducing these forces.

EXERCISE 5-2

OPEN SYSTEMS PLANNING

Open systems planning is a tool which acts as the basis for strategic planning. In open system planning those who have a vested interest in an apostolate are identified. For example in the context of a secondary school, these would be identified as the Jesuits, the lay teachers, parents, students, alumni, government, local community and so on. Each of these has a valid interest in what goes on in the school.

Step 1. What is our core mission?

Step 2 Who are our major interest groups and what do they demand of us?

Step 3 How are we currently responding to these demands?

Step 4 What will they be demanding of us in X years time?

Step 5 What do we want them to be demanding of us in X years time?

Step 6 Action planing

NOTES

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CHAPTER 6

IMPLEMENTING ORGANISATION DEVELOPMENT

Organisation development is a process of planned change. The strategic apostolic planning process described in Chapter 3 does not necessarily mean change. Indeed there are those who say that the strategic planning process limits its protagonists to simply improving what is already in existence, rather than creating anything new. Organisation development, while it contains elements of strategic planning in its perspective, extends beyond the planning process. Organisation development's philosophical basis was described in Chapter 5; its practical processes are presented in this chapter.

Organisation development structures how organisational leaders and members can take what is being sensed in their experience, reflect on it and implement desired changes. It names the many tasks in the change process. Some tasks require careful evaluation of the present situation. Other tasks emphasise the desired future. Still further tasks are those which require that the transition from the present to the future be well-managed. In this chapter I am presenting the tasks which a provincial or director of work needs to undertake to move a province or apostolate through the adaptive coping cycle.[69]

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[69] The approach in this chapter follows closely the work of Richard Beckhard and is found in, *Organizational Transitions: Managing Complex Change,* Richard Beckhard & Reuben Harris, Addison-Wesley: Reading, MA, 2nd edition, 1987; *Changing the Essence: The Art of Creating and Leading Fundamental Change in Organizations,* Richard Beckhard & Wendy Pritchard, Jossey-Bass: San Francisco, 1992.

The provincial considers four tasks:

I determining the need for change and the degree of choice,

II defining the future state, after the change has taken place,

III describing the present state,

IV implementing the change plan through cycles of planning, action and review. (Figure 6-1)

[Figure 6-1 about here]

I DETERMINING THE NEED FOR CHANGE

Determining why change is required is the first step in any planned change process. This determination names the forces for change which may be coming from the external environment, such as developing socio-religious needs. This is the fruit of social analysis and theological reflection. An adaptation of the First Contemplation of the Second Week of the Exercises, imagining the Trinity viewing the world is sometimes used as a means for focusing on the need for change. The forces for change may also come from within a province, such as the need for new ministries, for restructuring a ministry, the need to divest large properties, to adapt the balance of ministries in a province in the light of ageing manpower, the renewal of formation processes, to take a few examples. These forces for change have to be assessed and major change forces are distinguished from minor ones.

Another element in determining the need for change is the degree of choice about whether to change or not. This is often an overlooked question. In some instances

there is no control over the forces demanding change. In other instances there is a great deal of control over the change. In that case there is likely to be a good deal of scope as to what changes, how, and in what time-scale the change can take place.

As we saw in the adaptive coping cycle in Chapter 2, the process of taking in disconfirming information, assessing it and acting on it constitute the initial core elements of a change process. Lewin's term for this stage is *unfreezing*, i.e. that which has been solid is now unfrozen so that it can be manipulated to meet the demands of change. Because disconfirming information demands change of some form it is frequently threatening and can create anxiety. Accordingly, a very natural reaction to the demand for change is to resist until the situation is assessed and understood. Therefore, it is useful, at this juncture, to examine how individuals respond to the demands for change.

Some people find change difficult because of elements of their own personality. For instance, they may be set in their ways and find it extremely difficult to change their ways of working or thinking. They may have created a strong identity between who they are and what they do, so any change in what they do becomes personal.

In the Society, an approach to understanding and dealing with this resistance by any individual must be grounded in the Exercises. An individual's struggle with change when brought to prayer may uncover a deep sense of unworthiness, inadequacy before God or sinfulness. Then the individual must rely on God's healing and forgiving grace. The process of becoming free to change is not automatic or guaranteed; it is a complex spiritual psychological journey. Ultimately it is a gift.

Undoubtedly, some individuals are afflicted with psychological neuroses. Yet to reduce resistance to change to personality and locate the blame only on the individual does not do justice to either the individual or to the complexity of an organisational change process. Those resisting change may be some of the most intelligent and high-powered members of the province. Their resistance to change may be situational, that is that the way things are managed may themselves create the resistance. Some resistance may be grounded in how people have been treated by previous provincials and superiors.

At the same time, it must be recognised that resistance has both cognitive and affective elements. It is not only about anger, frustration, enthusiasm or excitement. An individual may resist a change because he thinks it will not solve the particular problem or perhaps he has an alternative solution. In this instance, resistance is grounded in a different assessment of what the problems are and how they might be resolved. Dealing with resistance involves, not only listening empathically to those who feel hurt by the change, but also by re-evaluating the analysis of the problems and the proposed courses of action. Such an approach to meeting resistance attempts to harness for action the dynamic energy which is currently being channelled into resistance.

II DEFINING THE DESIRED FUTURE

Once a sense of the need for change has been established, the most useful focus for attention is to define a desired future state. This process is essentially that of

articulating what the province or apostolate would look like after change has taken place. In ignatian terms, this process could be expressed in terms of articulating desires for the future of the province. A specific time should be defined. A provincial may think of the span of his term of office and several years beyond. One approach I frequently use with provincials is to ask them to portray the province, as they would like it to be when they hand over to their successor at the end of their tenure of office. That provides a concrete and manageable time-frame for an individual provincial to formulate a vision towards which he can work. He must take care that: a) the aim of the Society and its mission be portrayed; b) the vision be based on an analytic judgement as to what the environment of the future will be; and c) the future envisioned be different from a future that is simply a linear extension of the present without any intervention.

The process of defining the desired future is a function of the office of provincial. It provides a focus for his attention by describing the broad picture into which specific details may be added over time. For the change process to be successful it must be owned and led from the top. This is not to say that the process should be top-down, but simply to affirm the core role of provincial leadership in owning and leading the change process. The process of defining the future state at the outset is critical as it helps provide focus and energy because it describes the desires for the future in a positive light. On the other hand, an initial focus on the imperfect present may overemphasise negative experiences and generate pessimism. The description of the desired future can provide those not involved in defining the future state with a picture of how they might fit into the future. This can be a way of dealing with resistance by reducing anxiety and uncertainty.

III DESCRIBING THE PRESENT

Having articulated a desired future state, the provincial must attend to the present and ask, “What is it in the present which needs changing in order to move to the desired future state?” Because he is assessing the present in the light of the desired future, he can consider what needs changing and what does not. He may judge that, for the change to effectively take place, a change in current structures, attitudes, policies or activities may be needed. He may review that present locations of ministry or ways in which ministry is exercised. As any change problem is a cluster of possible changes, he may need to group particular problems under common headings, i.e. community life. Then he describes the problem more specifically, and asks, "Which of these requires priority attention? If A is changed will a solution to B fall easily into place? What needs to be done first?"

Another task in describing the present is to describe the relevant parts of the province that will be involved in the change. This description points to the critical people needed for the change to take place. Examples might include, the superiors, those involved in teaching ministry and those in formation. Their readiness and capability for change must be assessed. *Readiness* points to the motivation and willingness to change, while *capability* refers to whether they are able, psychologically and otherwise, to change. Ways of increasing readiness and capability may be planned and implemented, through, for example, workshops, seminars, retreats, assemblies and so on. In one province after GC 31, the provincial used a strategy of focusing on the individual through the promotion of sensitivity training and individually directed

retreats. The overall effect of the sensitivity training on the province was the beginnings of a gradual change of culture. Participants in the groups learned to become more open to change in themselves and to listen to others in their change. Experience of the individually directed retreats helped members of the province not only rediscover the dynamics of the Exercises for themselves and they also apply the learning from the sensitivity groups to religious experience. After GC 34, many provinces are holding workshops and seminars on culture to give focus to the renewal of ministry.

Resistance may continue at this stage as individuals and teams assess the impact of the change on them and on their life in the province. The provincial continues to listen to the issues, respond to them, negotiate appropriate and suitable outcomes and adjust the change plan where necessary to accommodate changes arising out of discernment and continuing interaction with members of the province.

IV IMPLEMENTING THE CHANGE PLAN THROUGH CYCLES OF PLANNING, ACTION & REVIEW

When the work to be done to move from the present to the desired future has been named, then cycles of planning, action and review go into operation. These cycles focus on long-term, medium term and short term projects, and involve both individual and apostolic discernment in common.

These cycles of planning, action and review are what is generally perceived as being the actual change process, though as we have seen, preparation for change is equally

essential. The critical task is to move from the present to the future and manage the intervening period of transition.

Transition

This transition state between the present and the future is typically a difficult time because the past is found to be defective and no longer tenable and the new state has not yet come into being. So, in essence, the transition state is somewhat particular, as the old has gone and the new has not yet been realised, and so needs to be seen and managed as such.

The transition state is a rather unique state of affairs. It is akin to having left home on a long journey, not having arrived at the destination yet, and being unable to return home. It is characterised by uncertainty, stress, and undirected or negatively directed levels of energy. For example, if those who put so much negative energy into complaining about the provincial put that energy into making the change work, then the change might progress more effectively. The past may be idealised, particularly by those opposed to change. There are demands for clear leadership and there may be intergroup conflict, particularly as some will be seen to benefit from the change while others will not. There are demands on the leadership to positively cope with these issues of uncertainty, stress and negative energy. Energy, especially negative energy, needs to be redirected and managed. There is a high demand on communication of information. The concern that the apostolate is suffering during the change must be met and the provincial must be trusted, respected and perceived as competent. As

already emphasised, the commitment and confidence of provincial leadership to the change and the future must be assured.

There are two aspects to managing this transition state. One is having a plan of action for change, which is simply the identification of the forms the change process will take - goals, activities, projects and experiments that will help achieve the desired state. The choice of where to begin the process offers the following options. The change can begin with the provincial, who models and implements the change himself. Another approach is to begin in those areas where there is already a readiness to change or the areas where change is needed most A new apostolate or community can be an experiment of the change; a temporary community can be set up to try it out. The choice of intervention for managing the change should be a decision made later rather than earlier in the process. It is the end than creates the means.

A provincial may need to set up the structures and processes to accomplish the change plan. This is because the work of change goes on at the same time as the normal apostolic activity of the province. So, in order to ensure that the change process receives its due attention and does not get demoted due to pressing ordinary business, the provincial may need to create some structures to keep the change moving. The provincial can personally take charge of the change project or delegate someone to co-ordinate it. It is not uncommon in provinces around the Society to find someone on the provincial staff with the assigned role of co-ordinator of planning. The change process can be managed by a task force or committee, such as a ministries commission. I will expand on these two mechanisms later in this chapter.

An important task in this process involves an effective use of meetings. The whole change process appears to be inevitably fraught with meetings. This can be perceived negatively, so an effective management of the number of and the internal workings of meetings is essential.

No amount of change can take place without commitment. A plan to build commitment focuses on whom in the province or apostolate must be committed to the change if it is to take place. There may be particular individuals whose support is a prerequisite for the change and a critical mass whose commitment is necessary to provide the energy and support for the change to occur. One way by which commitment to the change can be worked at is by involving members of the province through particular events, such as province assemblies, membership of task-forces, continuing formation courses and so on. Such processes do not guarantee success and, in the final count, there will be those who feel out of the renewal and choose to remain outside of any plan.

If a plan to create commitment to the change is not well managed or is unsuccessful, then individual Jesuits may find themselves in a pattern of disinterest and alienation from the province. Some individuals may opt to leave the Society. For others, leaving may not be a viable option, so disillusioned Jesuits may opt to drift into a mindset of persistent grumbling where they complain and grumble about conditions and how things are in the Society. Some individuals manage to find a niche for themselves in which they create their own private enclave and reduce interdependence with others.[70]

Defensive Behaviour

Defensive behaviour is described as when individuals, who oppose some state of affairs do not express their opposition directly. Rather, they avoid participating by over-conforming, passing the buck, playing dumb, depersonalising and stalling and avoiding blame by playing safe, justifying and scapegoating.[71] The final option is to collude with others who feel the same as they do in creating a collective delusion which becomes a neurotic mechanism. So there is blaming, hostility, aggression, anger, feelings of frustration and dysfunctional organisational behaviour. Collective neurotic behaviour in the Society results in individuals feeling frustrated and alienated and so they seek refuge in informal mechanisms by being apathetic and disinterested towards the contemporary Society and manifesting defensive reactions such as passive aggressiveness, ambivalence, projection and regression. Informal groups to sanction these defensive reactions are created and so ministry and community life are retarded. This behaviour has a cumulative effect, feeds back into the province and reinforces itself. In such a scenario, the intended planned organisational change may be severely retarded and may generate the need for further interventions. As I have already indicated, there are frequently reasons for this state of mind in the individuals' history in the province - how they were treated in their formation or at a later stage by previous provincials and superiors.

For the provincial, such situations pose enormous dilemmas. They have a responsibility to strategically lead the province into the future, and so collective

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[70] *The Neurotic Behaviour of Organisations,* Uri Merry & George Brown, Gestalt Institute of Cleveland Press: Cleveland, OH, 1987.
[71] "Defensive Behaviour in Organisations: a Preliminary Model", Blake Ashforth & Raymond Lee, *Human Relations,* Vol. 43, 1990, No. 7, pp. 621-648.

defensive behaviour is perceived as a barrier to renewal and change. At the same time, they love and care for all the members of their province as fellow Jesuits. Such dilemmas are not easily resolved. Ultimately, a provincial must help his province be renewed and care for those who feel alienated or unable to change.

Review

Review is the process of gathering and analysing information undertaken to provide those responsible for the management of the change with a satisfactory view of the progress of the effects and/or progress of the change effort. Review must be planned with clear purposes. Review can be an intervention that reviews outcomes and refocuses energy and commitment. It is not limited to Jesuits' perceptions of the effects of the change but must also include the evaluation of those with whom Jesuits work and for whom the changes are ultimately designed to assist. Evaluation of a change by Jesuits alone and one that is not supported by the views of significant others does not meet the requirements of the adaptive coping cycle.

Review is essentially reflection on experience and in any such reflection the critical questions are asked, not to evoke guilt or blame, but to generate learning as to what took place and what needs to be adjusted. If review is undertaken in the spirit of discernment then the likelihood of individual or team defensiveness can be lessened and learning can take place.

Once the change is in place it must be stabilised and maintained. There is an awkward balance or tension in institutionalising change while maintaining an openness to

further change. Provincials and directors of works must attend to the notion of continuous transition by building in review processes. This can be done through periodic but regular review meetings by specific teams and the provincial.

Provincials are typically very busy people. The day-to-day administration of a province is typically sufficient to keep them busy. Provincials need structures to help them keep a change process moving, so that the daily tasks of administering the province do not swallow it up. Across the Society, provincials are using two structures to help them do strategic planning and lead renewal, - ministries commissions and having a member of their staff as an organisation development consultant.

MINISTRIES COMMISSIONS - FACILITATING PROVINCE LEARNING

In the changing context of our ministries and the need to make adaptations in the light of changing manpower, the Society found it essential that there be structures and mechanisms in each province to help the cycle of reflection on experience and taking action. The Complementary Norms sums up the legislation.

> To promote the better choice of ministries and to foresee to some extent future developments, a commission should be set up as an aid to the provincial and under his authority; the task of this commission will be, after careful study and in view of the priorities established by the general of conference of Major Superiors, to give advice on an overall review of ministries. This will involve suggesting which ones ought to be kept or dropped and which others ought to be undertaken for the first time. Each year the provincial should report to Father General what has been done in this regard.[72]

[72] CN, Part VII, Chapter 3, 260 #1

Ministries commissions were prevalent across the Society after GC 31, then appeared to fall into disuse, to remerge again after GC 32 as provinces engaged in strategic planning. Their function, as is clear from the above citation from the Complementary Norms, is “to give advice on the review of ministries” in the light of foreseen future developments and apostolic priorities.

A ministries commission performs a different function for the provincial than does the provincial consult. The provincial consultors provide their judgement to the provincial on matters of the province on which he consults them. They help him make appointments, deal with problems of an individual nature and make decisions. A ministries commission is focused on the agenda of reviewing ministries and the creation and implementation of policy with regard to apostolic renewal. Accordingly, a group such as a ministries commission (or whatever equivalent title it may be given) can clearly be of value to a provincial.

A ministries commission can provide a supportive environment in which the provincial can express and deal with his own anxieties regarding the change process. It is also something of a microcosm of the province and can give an indication of how much change is required in the province. Part of its role can be to set up and monitor the task forces and other groups which will work on specific change agendas. Its members can act as bridges with the province - explaining what particular changes are about and helping build understanding and commitment.

In the contemporary Society ministries commissions can be hard to maintain because they can get locked into an administrative function and become bureaucratic as they

focus on generating reports. However, if the task of a ministries commission is conceived, not only in terms of producing policy, but also of enabling the rest of the province to change and learn, then it can be a valuable means of renewal.[73] For a group such as a ministries commission, this involves apostolic discernment in common and attention to learning.

The ministries commission must itself go through a learning process to develop norms which support discernment, learning and change. For Jesuit groups this involves building trust, sharing faith, learning to question assumptions, to reflect on process, and to articulate learning in a prayerful dynamic. It must design and monitor the renewal process by diagnosing renewal and learning needs, translating them into workable issues and creating the structures by setting up the task forces and groups to deal with the major issues. The task forces themselves must learn how to learn. They must be initiated into a way of working which facilitates discernment and learning. [74]

The ministries commission monitors the work and progress of the task forces and integrates their work from a province perspective. Throughout the process it communicates with the province, keeping it informed of what is happening, helping unfreezing, reducing anxiety and maintaining psychological safety. From its experience the ministries commission learns that the way it works is a way of life and that it has to be reinforced perpetually.

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[73] This section is based on "How can Organisations Learn Faster?: The Problem of Entering the Green Room", Edgar H. Schein, *Sloan Management Review,* Vol. 34, 1993, No. 2, pp. 85-92.
[74] *Renewing Apostolic Religious Life,* Ch. 7

For provincials who are responsible for the process of renewal of their provinces and who themselves may be uncertain and anxious as they attempt to learn how to lead change, the use of structures to support a learning process is essential. The many governance structures of the Society - consults, commissions, letters to and from Rome, visitations, budgeting etc. - have tended to become inward looking and bureaucratic in their approaches. A useful way of renewing such structures is to view and use them as means of promoting learning. Provincials may consider how to structure learning in their provinces. After all one cannot ask others to learn something new if one has not learned something new oneself. More than that, learning involves stepping outside one's own culture before one can discover the limitations of one's present culture and the possibilities in another. The anxieties inherent in this new learning situation are manageable only if they are shared and managed jointly in a group which is accountable for the ultimate welfare of the province. Learning will not be spread across the entire province unless a change/transition management group is created which will be accountable for organisational learning.

It is necessary for provincials to have a group which creates a supportive climate which will give them a sense of psychological safety and help them own the process of organisational learning. For provincials, such a group can be a province consult or a ministries commission, that is a group which has the entire province in its external and internal environments as its reference point. In some respects a ministries commission or its equivalent can perform this task more appropriately than a consult. Consults have specific agendas which are internal to the Society, while a ministries commission can take the external environment as its reference point and, therefore, be more apostolic in its orientation.

Such an approach has implications for how a provincial leads the province. Provincials must learn something new. Before members of the province change, a provincial must overcome his own cultural assumptions and perceive new ways of doing things. This may involve acknowledging ambiguities about planning, working with groups, participating in discernment and so on.

In summary, it may be that a ministries commission or its equivalent must work in a way that is somewhat outside the norms of the rest of the province through its emphasis on collaborative learning and discernment. In this way provincials can lead change in their provinces by means of a ministries commission. At the same time it must be acknowledged that, for provincials, the work of reviewing ministries and keeping a ministries commission not only serviced with information but animated and working well, involves considerable work. Accordingly, provincials may delegate some of this work to an individual whose role it becomes to co-ordinate province planning and review.

HAVING AN INTERNAL PROVINCE CONSULTANT

Throughout this book I have made reference to the "organisation development consultant". In some instances this person may be an external agent, that is, someone, a lay person or another religious, brought in from outside to help on a specific project.[75] In other instances this role may be performed by someone from within a

[75] *Renewing Apostolic Religious Life*, Ch. 9

province. In this instance, the role may be more long-term than that of an involvement in a specific project.

It is not uncommon for provincials to appoint an individual to take responsibility for the planning and renewal process. As a provincial has many responsibilities, assigning an individual to co-ordinate the process on his behalf allows the opportunity for a renewal process to be kept moving at a consistent pace. This additional role would be defined in terms of working with the provincial, superiors, directors of works, commissions, task forces and groups at co-ordinating the planning and renewal process. The function of such a person, whom for convenience sake I will refer to as the "province consultant", would be to create and implement a planning process in the province whereby the cycles of experience, reflection, decision and action are enacted. He would assist the provincial and directors of works in articulating vision and plans, implementing them, setting up review systems and monitoring the work of commissions and task forces.

There are some core areas of competence for the province consultant. He would need to know a great deal about ignatian spirituality, apostolic discernment in common, strategic planning, organisation development, teamwork and related areas. He would also need to be skilled in consulting, facilitating groups, working with plans and so on. For these areas of knowledge and skill, some education and training is necessary. An individual may engage in the formal study of these areas in the universities and institutes which offer courses in organisation development or he may participate in workshops organised through his province, assistancy or conference. The person assigned this role must have the confidence of the provincial and of the directors of

works and superiors of the province. This involves a disposition of being able to work in a helping role and implementing the provincial's proposals and plans.

CONCLUSIONS

Change, especially organisational change, is a complex process. A change effort requires understanding, especially by provincial leadership, of the complexities of intervention. It requires attention to many different tasks. Defining the future before assessing the present is a useful way to work. There is need to plan how the change will be managed in its transition stage and how commitment can be strengthened. The process of moving a change through a province - creating a vision of the changed state, planning interventions, building commitment and managing the transition - requires a systemic view of the complex inter-relationship and inter-dependence of the individual, the ministry team/community, the province and the Society. The construct of the four levels is very useful as a working framework in creating awareness of the issues occurring at each level and how one level affects another, and be able to work with individuals, teams and province groups to evaluate the effect of one level on another.

In this process of evaluating the impact of one level on another, one must take notice of the systemic nature of the relationship between each of the levels, that is to say, to construct how the relationship between one level and another works in both directions. An individual's sense of alienation from the team in which he works, affects not only his participation in the team and the team's work, but also what happens in the team affects his sense of alienation. When relationships are viewed as

systems, then there is no simple cause-and-effect linear chain. There is no direct line of blame. Each element in the system both causes and is caused by the other elements.

The keys which unlock systemic change are: i) a knowledge of why change is required, ii) a clear sense of purpose, and iii) appropriate change management structures where it is recognised that special structures are needed to identify the changes needed and keep the renewal process moving while the change agenda is being digested in the province and changes are being initiated. A ministries commission which is grounded in the ignatian process of discernment and learning is a valuable means for working with a provincial by both modelling and co-ordinating the changes efforts. To support this process and help make it work, the creation of a province consultant role is also useful and valuable. Such a role requires some relevant education and training.

EXERCISE 6-1

PROCESS OF APOSTOLIC CHANGE

[Adapted from Figure 6-1]

Step 1 Why change?
What are the external forces driving change?
What are the internal forces driving change?
How powerful are these forces?
What choices do we have?

Step 2 If things keep going the way they are without significant intervention where will we be in year X?
Given our mission where to do we want to be in year X?
Articulate that scenario

Step 3 What is it in the present that we need to change in order to get to our desired future?
Number of ministries, types of ministries, community life, formation, attitudes…

Step 4 What are the main avenues which will get us from here to there?
What are the particular projects within those avenues?
Long, medium, short term…
How do we involve the province in this project?
Where do we begin?
What actions do we take to effect maximum effect? medium effect? minimum effect?
How will we manage the transition?
How do we build commitment? Who is/is not ready/capable for change? How will we manage resistance?
Who will let it happen, help it happen, make it happen?
What review procedures do we need to establish?
Do we need help – consultants, facilitators…?

EXERCISE 6-2

QUESTIONS FOR REFLECTION BY PROVINCIALS AT THE OUTSET OF CHANGE

Do I choose an incremental, linear change approach, whereby things change step by step in sequential steps over time?

Do I choose a fundamental systems-based approach, whereby fundamental change is taking place simultaneously across the province?

How much will my own behaviour be driven and controlled by my own personal beliefs, values and priorities, how much by my need to stimulate, facilitate good leadership behaviour across the province by those who must themselves lead and manage change?

What roles do I play – facilitator, stimulator, driver…?

How do I both manage change and protect stability?

What messages do I want to communicate by my behaviour? To whom?

What tasks will I do myself?

What tasks will I personally manage?

For what tasks will I set up structures and allocate resources to manage, so that I am managing the management?

NOTES

NOTES

CHAPTER 7

A CASE OF ORGANISATION DEVELOPMENT AT WORK IN THE RENEWAL OF A PROVINCE

This chapter provides a case illustration of how organisation development was utilised in a province over a number of years. The case spans an eighteen year period, the administration of three provincials, and illustrates the application to change in a province of many of the theoretical constructs presented in the previous chapters.[76]

The Effects of Individual Resistance on Province Strategic Change Efforts

In 1965 GC 31 initiated an inquiry into the renewal of ministries across the Society. In keeping with what was taking place across the Society, the provincial of one province set up two commissions: one to conduct a social survey of environmental issues of the country in which the province was situated and the other, a ministries commission, to review his province's ministries with a view to advising what ministries should be expanded or closed and what new ones should be undertaken in the light of available manpower.[77]

The emphasis in both these commissions was on the collection of data – in one, the survey of external needs and in the other, an internal review, both core processes of

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[76] "Mapping the Process of Change through Organisational Levels: The Example of a Religious Order", David Coghlan. In R. Woodman, & W. Pasmore, (Eds.) *Research in Organisational Change and Development, Volume 9,* JAI: Greenwich, CT, 1996.

[77] GC 31, Decree 22, "The Commission for Promoting the Better Choice of Ministries".

strategic planning. The two commissions worked independently of each other and were concluded around the same time. The underlying assumptions behind the aim of the renewal process as envisaged in the work of the two commissions appears to have been that: (a) the formulation of external needs and the internal evaluation of current ministries would demonstrate the need for the renewal of ministries, and (b) this renewal would follow logically from the analysis. The two approaches constituted internal change mechanisms to articulate the need for change and evaluate the potency of the forces for change.

The focus of this provincial's effort was to renew the ministries of the province. The social survey aimed at an outside-in approach to ministry renewal (Level IV). On the other hand, the ministries commission aimed to coordinate the province's ministries from within the framework of the province's existing structures. It dealt with issues of personnel deployment and internal resource planning (Level III). In essence the ministries commission worked from different assumptions to the social survey and did not see its task to question the underlying structure of the province's ministries as they existed at the time.

The provincial (the first of the three in this case) held a meeting representative of the senior members of the province as a means of consulting the province about the results of the social survey and the work of the ministries commission. He intended to make strategic decisions. He also brought the material to a provincial congregation. At each of these meetings the need for transformational change was denied and proposals for change rejected. On reflection, it can be understood how the ministries commission and the social survey were intended to act as unfreezing agents and that

each would create the agenda for change by identifying the relevant internal and external forces for change, to which the members of the province would then respond. This constituted an empirical-rational approach to change whereby the evidence for change would of itself be convincing and point the way for change to occur. As change mechanisms the two commissions were very different. The ministries commission worked from the paradigm of the existing framework of province ministries. The provincial invited reactions to the report from the province; what emerged reflected conventional thinking within that framework and political defences of the status quo. On the other hand, the social survey worked from different premises; it produced a radical, challenging outlook. That the two mechanisms worked independently and from such different premises appears to have contributed to a difficulty in merging the two.

The presentation of the change issues for consideration in order that strategic decisions be made met with considerable resistance, denial and anger and the efforts were blocked. The senior members of the province seemed unable to move into a realm beyond their present thinking patterns. There was an apparent willingness to deal with some change within existing frameworks, but a move into new areas that required new thinking seemed too threatening. Change, as envisaged by the provincial, required a movement beyond existing frameworks. The pressure for change, which he generated, created considerable anger and resulted in alienation by many from the subsequent mainstream of reform and renewal. The empirical-rational approach to effecting change in the province floundered. Change at the province level could not be effected by presentation of the evidence for change from external and

internal forces alone. The blocks to change were in the individuals' assumptions about existing frameworks and in their emotional reactions to change.

After the two meetings at which the programme for change was rejected, the provincial was forced to re-evaluate his strategy. He was deeply committed to the need for change. He knew that change was not an option for the province. He also knew that change at the province level could not take place without significant individual change. He embarked on a deliberate path of unfreezing the province and targeted the individual as the focus for intervention. He realised that strategic and policy change could not take place unless the individual members of the province supported it and they would not support it unless they themselves had gone through some processes of personal change. His assumptions about how to achieve change moved from a rational-economic to a normative re-educative approach. He identified two elements to personal change - (1) renewal on the human level of becoming open to change and developing interpersonal skills and (2) renewal in ignatian spirituality. The two mechanisms initiated to achieve this were sensitivity training and the renewal of ignatian spirituality in the province.

The first strategy focused on sensitivity training whereby members of the province participated in encounter groups. Initially, participation was by invitation and then participation was open to any one who wished to attend. External facilitators acted as group leaders. The focus in the groups was on interpersonal communication, through which the individual learned about himself and others and developed skills of accurate listening and sharing personally. The effect of the process on the individual was that those who participated experienced a personal liberation from the restrictive culture

which emphasised individual autonomy, self-discipline and intellectualism. Participants grew in self-acceptance and learned a language for and a skill in interacting on a more personal level. Over four years sensitivity groups were held on a regular basis and a considerable number of the province participated in them.

The overall effect of the sensitivity training on the province was the beginnings of a gradual change of culture. The members were learning to acknowledge the role of and relate better to feelings in their experience. They learned to relate differently to one another in communities and apostolic teams through the development of better listening skills and acceptance of others. Communities and ministries were touched by the renewal of individuals. Where communities and ministries were experiencing divisions on the issues of change, the effect of the sensitivity training was that there were improvements in people's ability to listen and communicate with one another.

The provincial's second strategy targeting individual change focused on the contemporary developments in ignatian spirituality. In the post Vatican II and GC 31 years, Ignatius' writings and research into the Spiritual Exercises and the Constitutions were becoming available to Jesuits all over the world. This concretely resulted in Jesuits participating in individual directed retreats, seminars, workshops and renewal programmes on the contemporary understanding of the Constitutions and the Spiritual Exercises.

Structural Change through Organisation Development

While implementing his strategy aimed at unfreezing the individual level of the province, the provincial embarked on an organisation development project by employing an lay consultant to conduct a survey of the province and assess the need for structural change.[78] The consultant held interviews with members of the province who wished to meet him. Many confided in him and shared their fears, anxieties, hostilities and perceptions of the state of the province. The introduction of the external consultant, with his subsequent report, was a significant intervention. The consultant gathered the data and reflected it back to the province in an objective manner which highlighted the many problems of morale, interpersonal relations and governance structures. His approach was firmly grounded in the tradition of organisation development, in which the consultant works in a facilitative manner to enable the client organisation to uncover its problems and take steps to resolve them. In his report, the consultant identified issues at each of the four levels: morale and spirituality problems on the individual level, interpersonal and working relationships issues on the ministry team level, policy and management issues on the province level, and the crisis of identity emerging from the theological and spirituality changes which had emerged from Vatican II and GC 31. His response was to enable the province to set up a process to manage change. His main proposal was that an internal consulting team, which he termed the "Special Secretariat", be set up. The establishment of the Secretariat created an internal organisation development mechanism which would continuously monitor the progress of change by gathering data, keeping the work of task forces moving, co-ordinating and facilitating projects, working closely with the provincial and, in general, keeping an eye on process. The consultant trained the members of the Secretariat to fulfil the role of internal

[78] "A Province Reviews Itself", *CIS* #I, 1973, 46-52

organisation development consultants to the province and in this regard passed on his skills to the organisation. Many task forces were set up to investigate particular aspects of policy and make recommendations to the provincial. The Secretariat serviced these task forces by attending the meetings, acting as resource persons to make data available for analysis, clarifying objectives and helping keep the task focused. The Secretariat worked as personal consultants to the provincial, helping him clarify his objectives and facilitating the strategic management of the province.

Progress of the Change Process through Teambuilding and Policy Development

When the provincial's six-year term expired, there was a change of provincial. The incoming provincial continued his predecessor's focus on renewal. A workshop on teambuilding attended by seven ministry teams was organised by the Secretariat. This was an attempt to answer the question of what could follow from the sensitivity group type experience and was the first time there was a focus on a work-oriented group experience. That workshop was successful and others followed. Team process now became a more formalised agenda in that there was the beginnings of an awareness of how meetings work and how groups go about problem solving and decision-making.

In preparation for a forthcoming procurators' congregation and the preceding provincial congregation, and as it was now ten years since the original social survey and the ministries commission, it was decided that an open systems planning approach would be utilised to integrate environmental scanning with an internal review. Each community met, followed the open systems planning steps (cf. Exercise 5-1) and submitted a list of key apostolic concerns and issues to the Secretariat. The Secretariat

analysed the results from each community and complied a list of apostolic areas. In preparation for the provincial congregation, eleven working parties were formed, one for each apostolic area identified. The working parties met over several months and prepared a report on each apostolic area. At the provincial congregation the reports were discussed and policy formulated around each of the eleven apostolic areas. While the exercise in following the open system planing approach and producing the strategic material enabled the province to think positively about its strategic direction and take a proactive stance towards its mission, the plan was unrealistic in terms of its future manpower. Accordingly, the agenda of priorities of ministries re-emerged. This agenda had been active ten years previously but because of the province's lack of unfreezing and inability to face such issues it had been denied and dodged.

The provincial of this period moved the focus on the individual (Level I) to the team/community (Level II) to the province (Level III) and to the organisation (Level IV) in the open systems planning process. The teambuilding workshops were explicit developments of the encounter group in the direction of more effective interpersonal communication and working relationships in communities and ministry teams. While personal development programmes continued, they were not emphasised in the same way. It seemed that the bonding process was now working in a way which did not resist change as vigorously as some years previously. It was possible to move to Levels II and III as a focus for intervention once the effects of the Level I interventions had taken root and there was greater readiness and capability for change. Unfreezing at the individual level opened up the possibility of moving on to unfreezing at the team and province levels.

The provincial refocused both the target for change and the mechanisms of change. He shifted the target from the individual level to the team and province levels and the mechanisms focused more on involvement of teams and communities throughout the province, rather than a focus on task-forces and selected individuals researching and creating policy. While he continued both, he shifted the focus more towards creating shared responsibility and involvement. He was facilitating the development of normative re-educative change.

Integrating the Four Levels in Strategy Formulation

At the outset of his provincialate, the incoming provincial (the third in the sequence) declared his intention to focus on strategy and strategic planning. He commissioned the director of the Secretariat to undertake a major project on strategic planning. Another member of the province was co-opted onto the project, first on a part-time basis then as a member of the Secretariat. The two men undertook an intensive programme of study, reflection and consultation on the subject of corporate planning. They contacted other provinces and studied the documents sent from these provinces. They met business executives and discussed corporate strategy. They formed several conclusions from their study and discussions.

First, they understood strategic planning as an integrated approach to planning which was based on four key stages:

(1) a strong sense of the Society's basic aims/identity,

(2) analysis of the external environment,

(3) an internal audit of the province's resources,

(4) a set of decisions and plans made for a concrete period of time in the light of (1), (2) and (3).

From their reading and consultations, it was clear that the planning process involved an iterative, interactive flow of information throughout the province through a time-cycle so that what emerged would be an appropriate blend of information, analysis, judgement and decision from all hierarchical levels of the province. The role of the provincial would be central and critical to the planning process.

Second, they concluded that, while the strategic planning literature was directed towards commercial enterprise and success in commercial terms, its principles and primary features could be applied to the aims and operation of the province. The province was an organisation, with a mission to attain, a changing external environment and limited resources at its disposal. Therefore, strategic planning and management concepts could be adapted to fit an organisation such as a religious order.

Their third conclusion was a sense that the province needed an integrated planning system as a form of government and that would entail the creation of its own planning manual and process. Hitherto, planning in a formal sense was uneven in the province. Some apostolates planned; others did not. Many planned from within, extrapolating from what had been done in the past and making adaptations. What the provincial was seeking was a model in which the province as a unit would move forward in an integrated manner, with each apostolate fulfilling its mission in its own field. This conclusion was consistent with what the consultant had identified as a major task in the province ten years earlier.

In order to move the process from the conceptual to the actual, the provincial decided that, at a forthcoming assembly of the whole province he would make some significant statement about planning. The assembly would be an appropriate occasion to unveil his plan. It would be a significant moment in the process - the provincial would be openly declaring his intention, owning the process publicly and leading from the top. In preparation, a fifty-page dossier was drawn up over several months with the aim of articulating something of the core of the province's corporate planning process. The dossier contained chapters of analysis of the external environment, the priorities which had been established in the order world-wide, the history of the development of policy in the province, some key elements of process and personnel statistics.

In his address at the assembly the provincial shared his perspective on the state of the province, the context in which the province was ministering and the challenges facing it in terms of the external forces and the internal forces with respect to managing change. He declared that he was committing the province to the four-step ignatian process of (1) experience, (2) reflection on experience, (3) decisions and (4) action in the light of that reflection, articulated in Our Mission Today of GC 32. The focus of attention was on the Society's mission (Level IV), through articulation of mission, understanding the development of policy and research on strategy and strategic issues. The assembly address focused on the four-step process, which was aimed to facilitate the emergence and formulation of strategy, that would be followed by the province (Level III), ministry teams and communities (Level II) and individuals (Level I).

After the assembly the provincial invited about sixty members of the province to participate in a sharing of his leadership role by becoming member of groups established to draft policy. He formed eight groups and asked them to submit a two-page policy document on their area of focus in ten months time. They were to use the four-step action-research process. These groups each took an area of province ministry, with the group's membership generally drawn from that area. Some groups met frequently, others hardly at all. In general the groups that met most and which followed the action research process proved the most fruitful. Those that did not meet much or broke up produced work of uneven quality. The Secretariat participated in each of the groups and during the period hosted review meetings for the leaders. On several occasions the provincial attended the review meetings and renewed his commitment to what the groups were doing.

After ten months two things were achieved. First, the groups submitted their reports - the content of a draft policy of the eight major areas of province ministry. This was done at a province assembly at which the reports were distributed and discussion groups formed on the basis of interest, in which individuals could meet the groups and discuss their report. The provincial publicly accepted the reports and committed himself to taking them further. He now had the content of potential policy from a fairly wide consultation and use of the four-step process. Secondly, each community and apostolate was experiencing something of a strategic planning process in an interactive, iterative approach.

For the strategic plan and the continuing strategic awareness to proceed some structural change was required at the province level. Twelve years previously, the

consultant had pinpointed deficiencies in the province's governance system which he had suggested be remedied by the creation of the Special Secretariat. Now something else was required to cope with the policy developments. A structural defect existed in the administrative structure of the province. There was no mechanism for handling policy material at the sector level. The provincial typically dealt with each apostolate individually. The provincial appointed "delegates". These were to be advisors on the sectors, on a part-time basis, and while they did not have vice-provincial powers they were given authority to represent the provincial in handling issue of policy, planning and review. The delegates were invited to sit on a commission called, "The Commission on Ministries and Continuing Formation." The reasoning behind this new body was to create a forum for policy formation and review, at province, sector and apostolate levels. It would focus primarily on ministries, and through its position at the corporate level of the hierarchy, aim at integration of the sectors and dimensions in terms of mission and identity. It aimed at being outward-looking, concentrating on keeping ministries in tune with changing times. As the delegates formed the core membership it aimed at encouraging each delegate to have a structure whereby each ministry in a sector would be regularly reviewed in terms of its own and the province's objectives. Through its bird's-eye view of the province it would monitor the long-term goals of the province, each sector and particularly the criteria which guide the choice of goal.

The content of the eight policy groups' work, as developed by the Ministries Commission was circulated to the province and each individual received a copy of the draft policy document of the sector in which he worked. At an assembly of the province the provincial presented the overall plan. On an overhead transparency was

the word, "implementation." He declared that the purpose of the plan was to give "focus and urgency" to the province's mission. He proclaimed the policy to be in operation and invited the members of the province to study it and understand what was being asked of everyone.

Some six months later the fruit of the four years' work and processes was incorporated into a sixty-page booklet and published as a strategic plan. There were sections on the foundations of policy - the rationale for planning and the history of the province's development efforts over twenty years. There were sections on vision and the realities of the external environment. There were sections on structures and the selection of priorities. Individual issues, such as fear of change were addressed. The six sectors and each ministry within each sector were detailed, with a brief policy statement on each one, comprising a value judgement about that ministry and what was intended to happen in its regard over the coming period. These policy statements were essentially similar to or developments of the work of the eight groups and the Commission on Ministries.

In terms of organisational levels, the tasks at each of the four levels were addressed and there was an integration of the four levels and some achievement of harmony between them. On the organisational level (Level IV) there was an explicit development of strategic policy designed to enable the province's *adaptation* to contemporary environment. That was explicitly linked to the province's limited resources, the need to set priorities between ministries in order to *co-ordinate* resources more effectively and establish inter-ministry policies and planning structures in order that specific ministries *function* in terms of their own mission and

goals. At the same time a great deal of effort was put into articulating a spirituality of identity to enable individuals to *identify and bond* with the Society in a time of change, through an emphasis on planning, review and adaptability as core values. The cycle of what had been intended some fifteen years earlier had come round again and was put into motion. The province had learned something from the experience of the previous fifteen years and was utilising the skills it had learned to manage change, to build teams, to communicate and to be attuned to the contemporary articulations of its mission.

CONCLUSIONS

This story has attempted to provide a flavour of the process of organisation development in a province of the Society over an eighteen year period. Several patterns emerge:

- A concern for process is evident through the entire period. Each provincial, in his own way, attempted to involve members of the province in analysis and decision-making.

- This concern for process was both influenced by and in turn utilised organisation development. In the early stages, there was an emphasis on facilitating individuals, communities and ministries to unfreeze, through training and development in group skills, counselling and spiritual direction. Later, when change had begun, there was further training in teambuilding and consultancy skills and an gradual exposure to strategic thinking and planning.

- One somewhat notable feature of the process has been that, apart from the one lay consultant who worked with the first of the provincials at the early stages of

the process, the change process was managed internally. This was because the province invested in developing internal organisation development awareness and skills. The Special Secretariat acted as an organisation development consultancy agency within the province. In later years, when the Secretariat was disbanded, the internal consultancy function continued through a staff member of the provincial curia, and then through a member of the province who had the designated role, "province consultant" in the catalogue.

- Each of the provincials utilised the construct of four organisational levels, without being conscious of such a construct. Each saw the need to consistently link province change with individual change and individual change with participating in teams and communities and between teams and communities in the province. The first provincial targeted the individual for specific interventions when the strategic change issues were blocked. The second provincial built on the development of the individual and focused attention on working teams, which the third provincial then took to a strategic province perspective.

The study of a change process over an extended period of time provides the opportunity to examine and understand how the four levels interrelate in a planned change process. The effort to create change at the strategic level (Level IV) was not sufficient to enable the members of the province to reframe their perspective and allay their fears in order to adapt to driving forces for change. Subsequent effort to create change focused initially on the individual (Level I), then on teams and communities (Level II) and then concurrently on Levels I, II and III. The question remains as to what degree of Level I commitment and participation is required for Levels II, III and IV to complete their tasks to a satisfactory degree. What does emerge is that after

some degree of attainment of Level I intervention goals, Levels II and III can be worked at concurrently, and that then Level IV efforts can be given a focus. This does not deny the validity of approaching planned change through any other path or sequence of levels. The overall lesson is that strategic change must take account of the behavioural dynamics within the province.

In respect to change theory, it can be seen that the unfreezing period, in which the issue of and reasons for change were raised and pushed, lasted several years. Denial and dodging were prevalent. The changing-moving stage overlapped with unfreezing as change moved through the province. The provincial who adopts a normative re-educative approach acknowledges the difficulty of unlearning and relearning and the role played by the social system with which the individual identifies. The organisation development approach, which works from a normative re-educative perspective, was facilitative of the re-educative demands of the change process.

The three threads of learning which have contributed to this development have been: (1) the considered attention to all four organisational levels, as dynamically inter-related and inter-dependent, whereby when strategic change at Level IV ran into difficulties, the bonding relationship at Level I was recognised as key and so intervention was designed to meet individual issues. The individual-focused interventions naturally led into group and team interventions (Level II) from which followed province interventions (Level III) which enabled the strategic agenda at Level IV to be achieved.

(2) the work on planning and renewing ministries, which has established mission, external and internal forces as key ingredients for decision-making,

(3) the skills in groupwork which developed from encounter groups, team workshops and community and apostolic processes over the years.

The province illustrated in this case has not terminated its renewal process. Under the leadership of the provincials who have succeeded the three mentioned, the province has begun revising its strategic plan and continued to work at integrating planning and learning into its process.

A FINAL WORD

By now the reasons must be clear why the painful change from what is familiar to what is different is a complex process. Of course, it is not usually clear what to change or what to change to, so processes such as articulating desires and vision, analysing needs, assessing resources, weighting options, taking decisions, implementing them and reviewing progress must be undertaken. These processes involve, not only individuals, but individuals as they are members of teams and communities, teams and communities as they are members of a province, a province as a member of a conference, and all as members of the body of the Society. These levels of membership are integrally inter-related and inter-dependent.

In the process of strategy and renewal, there is an interactive relationship between the aim of the Society, reading the "signs of the times", the resources of the Society, "our way of proceeding" and the desires and vision of leadership. These factors must be worked through in an ignatian process of experience, prayerful reflection on that experience, discerned decision and action, acknowledging the fragility of human nature knowing "that one is a sinner, yet called to be a companion of Jesus as Ignatius was".[79]

The purpose of this book is to draw together many of the themes relating to the renewal of the Society in the light of an organisation development approach to managing organisational change. Many of the key elements of the ignatian practice of

[79] GC 32, Decree 2, “Jesuits Today”, #11.

apostolic renewal can be supported by the principles of organisation development theory and practice.

One major caveat needs to be sounded with regard to the material in this book. While the Society is an organisation and has to be managed as such, the organisational model, as presented here, has its limitations. The organisational model does not reflect the totality of the mission and life of the Society; what it does is inform and provide useful constructs for some aspects of the "our way of proceeding". The spiritual nature of the Society's government, particularly with respect to the freedom of Jesuits to be old, sick and unable to change, the role of dissent, the place of charismatic individuals who will never be tied down into a collective venture, are aspects of the Society governed by the "inner law of love" which counters the danger that an organisation development approach could become a new form of bureaucracy and enforce compliance. As with other disciplines, the texts provide conceptual frameworks which can help the individual develop the skills of helping collective ventures manage their change. In the hands of the sensitive individual, who uses these “good instruments” in a compassionate collaborative manner, organisation development can enrich the processes of Jesuit apostolic renewal.

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