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Paper presented at PCPM, USG, UISG Meeting 16/4/2021

Safe environments in initial and ongoing formation for religious life

This paper explores safe environments in initial and ongoing formation for religious life. I think this was a wise and deliberate choice of wording. Rather than the title: 'Safeguarding in initial and ongoing formation' using the term safe environments presents us with a wider scope. Safe environments do of course include safeguarding, or some might use the term child protection, but in doing so there is a danger that the lens might become too narrow. And further, if child protection is indeed viewed through a very narrow lens which states that as long as no child is being abused, then all is well. Or that the subject does not apply because a House of Formation never has children to visit, then attention to healthy boundaries and the potential or actual vulnerabilities of adults is denied. Whilst we all are aware that the four pillars of formation are the spiritual, human, intellectual and pastoral, the focus in this paper will be on human formation, although of course there will be many times human formation will cross into the realm of what we might define as pastoral.

Human Formation, however, can present more demands, I believe for a Formator. It can also be experienced as challenging for those women and men who are in their initial formation. This might lead to a tendency to approach topics within this area too generally to avoid difficult conversations. In contexts where Human Formation is seen as too nebulous, the focus might be on what are relatively safe areas to explore such as responding to stress, managing anxiety or anger management. Whilst these are important, they can remain at a cerebral or at worse an immature level of engagement with a false assumption that this will equip women and men with lifelong skills to manage their emotions. The apprehension in terms of exploring all elements of psychological growth at the level of physical, sexual and moral maturity might create avoidance. After all, is it not easier to discuss with those in formation how to achieve a level of spiritual maturity rather than explore how to achieve healthy physical, emotional and sexual boundaries? Perhaps an underlying anxiety might be that if we talk about it then, that opens a heavily closed door to thinking talking, imagining and indeed exploring sexual feelings and fantasies.

Regrettably, the sexual abuse crisis in the Catholic Church continues to dominate and raises questions about why, after the development of so many child protection and safeguarding policies, so many initiatives, abuse is not only still being uncovered but continues to apparently have been covered up, with children and vulnerable adults being abused in the present.

This raises critical questions about why is this continuing? Why and how do we still have situations where a newly ordained priest or recently professed male and female religious, abuse children and or vulnerable adults? Why are men and women who have made vows still finding themselves drawn to inappropriate sexual relationships with vulnerable adults? You will know from your own experience of listening to victims, how devastating the impact

of abuse can be. Some of you will also know the impact personally when the accused is a member of your own community. Religious communities often carry a collective sense of guilt and shame when this happens. They search for answers which are often elusive. Indeed, there are no easy answers, but what is clear is that safeguarding training during initial formation in itself is not enough. Neither is annual mandatory safeguarding updates because we are collectively failing to discover what are the root causes of abuse and steps towards prevention are still inadequate. Placing safeguarding in a context is essential so that it becomes an everyday part of how we live and interact with others.

What can we learn together about creating safe environments in formation? What models of formation might help us to understand?

Professor Hans Zollner, a Jesuit who is President of the Centre for Child Protection at the Pontifical Gregorian University and who will be known to most of you as a leading expert in this area, has identified three models of formation currently in place:

1. **The Perfectionist Model:** which is idealistic, striving for what is morally pure and unquestionable, it seeks blind obedience from those in formation.
2. **The Self Realisation Model:** where time is spent trying to engage in a self-discovery regarding how to grow and develop whilst avoiding conflict with the Formators.
- 3.
4. **The Integration Model:** which enables a responsible exercise of freedom, the identification of tensions which are addressed at both personal and communal levels. This model presupposes an awareness of what St Ignatius would describe as the inner movements and in this way (the individual is able to discern and can be seen) progressing through a school of the heart.ⁱ

How much indeed might we yearn for that Integration Model. I would also like to bring to your attention the work of Dr Paul Nwobi a Diocesan priest, in his review particularly of the development of seminary formation, he concludes that:

“the seminary education system in the Catholic world today is in line with the high school or graduate education system of many countries where it operates. It is essentially an academic structure.”ⁱⁱ

This has been an established model for a long time and not exclusive to the preparation for Diocesan priesthood. In reality, and thank God, it has formed many good women and men religious who have dedicated their lives selflessly to various forms of ministry. However, the focus on the academic has enabled psychological splitting between the head and the heart and indeed the head and the soul. It is important to reflect upon how we arrived at a place where academic prowess was intended to equip women and men with an omnipotence which prepared them to respond to not only the emotionally conflicting behaviours of those with whom they live in community but also to achieve an almost automatically assumed level of affective maturity within themselves. This assumption about affective maturity then provided a false resilience against emotional, physical and sexual feelings which in turn were

regarded entirely as sinful temptations with a lack of an appropriate context for such feelings to be addressed. I would further suggest that any understanding of safe environments meant applying rigorous rules of conformity in all areas of formation. I am sure some of you can look back at your own formation and recall rules in the novitiate which were imposed to deter any sense of what it meant to be a woman or a man developing as a whole person with emotions and a sexual identity. Even the phrase which was that 'particular friendships' in formation were to be discouraged, will resonate with some of you.

John Mark Falkenhain, a Benedictine priest, in quoting *Vita Consecrata*, states that affective maturity is linked to other important qualities to be developed in religious women and men. The apostolic exhortation asks that special importance be given to the ability of those in initial formation to communicate with others in community and to recognise what Pope John Paul II described as a correspondence between actions and words. ⁱⁱⁱ

This 'correspondence between actions and words' is seen in conflict, all too clearly when a religious might be able to express verbally the appropriateness of boundaries to create safe environments yet in his or her often very observable physical behaviours towards others in the community there is little tangible evidence of self-control. Even more concerning are those who again might actively promote safe environments which secretly abusing a child or a vulnerable adult to satisfy his or her own sexual needs.

Further, John Mark Falkenhain identifies other factors beyond the lack of affective maturity which have "affected the life of the Church and thereby eroded the credibility of priests and religious in the eyes of the laity. Poor boundaries, failures to empathise, selfishness, emotional coldness and poorly controlled tempers are just a few. "^{iv}

Sadly, too, in listening to the voices of victims of sexual abuse in the Church, they describe experiencing those same responses of poor boundaries, failure to empathise and emotional coldness when they have felt brave enough to speak for the first time about the past.

Candidates for Religious Life

It is important to be mindful of this changing landscape. This is where cultural dimensions come into play. Junior seminaries or Junior Houses of Formation might be less prevalent in some countries but in others they remain a rich source of vocations. Here in the United Kingdom, Junior Seminaries for example provided a good Catholic education for many boys. Yet, pre-pubescent boys leaving home to attend a seminary run by diocesan clergy has been problematic later in life for some of those who were ordained. Their own emotional maturity was in some instances delayed and the crisis point later in priesthood came with the first experience of falling in love and experiencing sexual intimacy. Indeed also, there was little training or preparation for this role when a Bishop appointed a priest to teach in that context. In such a male dominated setting, the only contact with women would have often been female religious who cooked the boys meals and looked after the laundry. I would question what impact that had in terms of role models for aspiring young boys. Then

after Ordination, their experience would have been of a woman housekeeper, taking care of them and fulfilling those same domestic roles.

In current times, there are more candidates for religious life, particularly in the Western context, who have already attended university, lived independently, had close friendships and perhaps intimate sexual relationships too. To make any assumptions that such women and men will easily fit into a novitiate is perhaps a little naïve. This often comes from a false perception that the candidate has “lived life” and therefore be able to manage their own emotions and indeed temptations during their novitiate.

Guy Lespinay a Dominican, captures this well when he writes:

“Contemporary life is a life of freedom where, outside the professional framework, everyone thinks of himself or his family...This freedom will be seriously put to the test on the level of culture or ideas. The person who enters will be confronted with generations very different from his own. How will he live with that difference of age, culture and practices of life? This can be a great challenge, both for the candidate and for the persons in charge of his formation”^v

Whatever the context in different parts of the world, cognisance must be given to the individual needs of women and men who wish to enter religious life. The expectation that they will fit into a rigid mould is not always life giving. Even more complex are novitiates where the age range is much broader so there might be 16-year-olds entering alongside mature adults in their 30s. A further consideration is those who might suffer bullying and or sexual emotional or spiritual abuse during formation and be too afraid to speak out because of the anxiety of being either ostracised or dismissed. Women and men religious who are in formation not only need to learn about safe environments, but Formators have to ensure that the House of Formation is a safe community. How can Formators create safe environments?

A focus for creating safe environments can be found in Human Formation

Pastores Daba Vobis expresses it in this way:

“Since the charism of celibacy, even when it is genuine and has proved itself, leaves one's affections and instinctive impulses intact, candidates to the priesthood need an affective maturity which is prudent, able to renounce anything that is a threat to it, vigilant over both body and spirit, and capable of esteem and respect in interpersonal relationships between men and women. A precious help can be given by a suitable education to true friendship, following the image of the bonds of fraternal affection which Christ himself lived on earth (cf. Jn. 11:5).”^{vi}

The bonds of fraternal affection are critical here. Good Human Formation programmes which create safe environments might be placed under an overarching approach which is to live a healthy life. It is, to use a phrase from John Mark Falkenhain again, when asked about living the celibate life, the response is not ‘how we live’ but ‘how we love’.^{vii} If religious can be encouraged to love in a healthy boundaried way, then they will be able to love themselves and each other with genuine respect and dignity. Love of self here means taking

care to live and love well and sustainably with active care for those who are vulnerable. Living healthily means that difficult conversations can happen because there is a valued acceptance within community life to enable this to happen. Living a healthy life will provide the skills to sustain those moments of personal and communal tensions. Living a healthy life will allow those who are in crisis at whatever level, to find the right support to become well again.

The Tasks of Formators

As you know the term formation comes from the Latin word 'formare' which means to mould. This is critical because there is a tendency to regard formation as a context for education or instruction. If the task of Formators is to mould, accompany and guide religious towards becoming emotionally and spiritually mature women and men, then this is the real pathway to creating safe environments. Both initial and ongoing formation aim to interiorly deepen the desire to be Christlike and that moulding is a lifelong journey.

As Prioress General of a Congregation of Benedictine Sisters has captured it:

“Understanding formation as ongoing refers to the fact that it is a constant personalisation or interiorisation of Christ’s life. It is a learning process which involves change, growth and the transformation of the person.”^{viii}

I have valued my own experience of working in Formation, this has been with a specific safeguarding focus which is about creating safe environments for everyone. During the initial formation process a fundamental approach is to provide robust content in order to enable the development of life-long skills. I will never forget a fellow formator reminding a group of seminarians after I had presented several sessions to them, that what I was offering were tools for ministry. That is important to remember, aspects of Human Formation should not be standalone topics but form part of a continuum in which women and men are not only prepared for the apostolic or contemplative life but enabled to do so as fully integrated adults.

I would like to suggest some possible ways forward and address the topic of ongoing formation.

Formators have to be formed

Formators should have training – their own formation and external professional supervision. If Formators are still processing their own emotional and psychological issues, then how can they take on this important task of moulding others? Several years ago, I was invited to develop further the Human formation Programmes for candidates in their propaedeutic formation, I discussed with the Rector that this should include celibacy. To my surprise he was delighted and said the chance of the men having input on celibacy from a married lay woman would be relatively unique. This raises questions for me about the importance of having both women and men as formators in single sex settings.

I want to share with you if I may a moment, when I was leading a session on exploring celibacy, a very young seminarian came and asked at the coffee break what we were doing afterwards. My reply was 'more celibacy' to which I received a very enthusiastic response about how much he was enjoying it. I could not help but respond by saying I hoped he would be still saying that in ten years' time!

To return to the topics of Formators, continuity too is important. Consistent messages about living healthily will in itself bring a sense of security.

John Mark Falkenhain makes this point: "As formation personnel change, so do levels of expertise, availability of resources and ideas about how formation should be approached. The result is often a formation programme that is continuously under construction".

In as much as formation should evolve and adjust to changing demands, new research and learning, if it is in a state of constant revision or of being under construction, this does not bode well for creating a safe environments. I might dare to suggest that if there are Formators also 'under construction' then the resultant chaos can lead to an increasing lack of safety.

Professor Zollner, in speaking about how those in formation for priesthood might behave, describes the possibility of a seminarian behaving like a submarine, hidden deep below the surface and only emerging from below the water at the point of Ordination to Diaconate. And then entering into ministry to regard women as a temptation to be avoided. We might, if we had time consider other images which might resonate from your own experience of those in formation perhaps behaving like a lonely rowing boat: someone who is a loner, avoidant of community life and afraid of exploring their shadow side. Or the behaviour of someone in formation who seeks to find their own identity which differs from the charism of the Religious Institute, and is an identity founded on trends of popularity, but behaving like a well-known brand of Cargo Ship, nobody feels they want to tackle something that big, so a Formator will hope that the next person might handle the problem.

Screening of candidates

I have, throughout the last 20 years or so of working in safeguarding, always believed that the screening of candidates is essential. I have encountered, at times, both hesitancy and reluctance to enforce screening for candidates. Often when I have shared this in various contexts, it has been met with some degree of surprise: why would one **not** ask a candidate for religious life to attend a screening assessment? I think there are two reasons for this, one is that if there are underlying psychosocial issues which emerge, where are the resources to address them and secondly is it not best to – if I may use a very English term, 'let sleeping dogs lie'. This response is often accompanied by the inaccurate belief that if the novice has **any** problems then surely these will be worked out as she/he progresses through religious life. Secondly, if significant issues are identified, then perhaps the individual should not enter the novitiate which has consequences for some Religious Institutes and Congregations who worry about a lack of vocations.

My professional stance regarding psychological screening is that this is a pivotal opportunity in the discernment process for the individual, and indeed for the community which he or she wishes to enter. Admittedly there will be situations when the screening process identifies significant areas of under development and or concern which might mean that the pathway for the individual towards religious life might have to be paused or not progressed. In other ways a good assessment will identify areas of strength and specific areas for growth.

Ongoing Formation

John Mark Falkenhain describes on going formation versus overdue initial formation. He believes that sometimes ongoing formation is actually perhaps for the first-time providing opportunities for individuals and communities to address very crucial and sensitive issues which were absent from initial formation.

Paul Nwobi very helpfully refers to the three principal parts of a formation agenda, but I have included it here because I believe this applies very much to ongoing formation. He describes the three principle aspects as follows:

“First is gathered to learn. That is to say that everything in life invites us to learn something different or new about the demands of selfless love, of working in truth and honesty for justice and peace with all and to all. The second challenge is challenged to grow. This means that everything in life challenges us to grow in all aspects of life, intellectually, morally, affectively, religiously and spiritually. The third is sent to serve. This also implies that everything in life invites us to serve God and other people redemptively as Jesus served in humility, in generosity, in care and compassion without prejudice, favouritism, exploitation and oppression.^{ix}

I believe that what Paul Nwobi has offered here is almost a programme in itself for ongoing formation and there is much to reflect upon within each principle.

Formation is a lifelong process and ongoing formation is vitally important and should not be seen as a tick box exercise or a duty, with the exception of that sense of duty to prioritise the safety of children and the vulnerable. The importance of a culture of prevention means a zero tolerance of abuse. Culture is about having the right values. If communities of religious women and men have the right values, if they are living in a Christ like way, then there will be healthy communication and a growth which brings transformation.

There are of good models of ongoing formation for religious. I am sure you are already aware of some and I hope you will feel able to share how effective they are in creating safe environments. I would direct you to the Monastic Formators Programme established in 2002. Those of you who are familiar with this Programme will know that it is an international one. The Director is Dom Brendan Thomas a monk of Belmont Abbey and the Associate Director s Dom Mark Butlin, a monk of Ampleforth Abbey also in England. If you wish to find out more, please do get in touch with me or directly via the Monastic Formators Programme website.

I would also like to bring your attention what is happening within the Society of Jesus in terms of ongoing formation. The “Conversations that Matter” (CTM) is the name of the continuing education programme for Jesuits of the United States and is part of the Society of Jesus’ ongoing commitment to creating safe environments for children and young people. This annual programme is designed to assist Jesuits in understanding their evolving roles in maintaining appropriate boundaries in ministry and provide information about resources for the prevention of child sexual abuse. In addition, it is hoped that CTM will promote community discussions about ways to live out their vowed chastity in a spiritually, psychologically and emotionally healthy manner.

Finally, Fr David Songy, and the team at St Luke’s Institute Washington (SLI Connect) has a wealth of resources for the support of clergy and religious in the context of ongoing learning.

And if I might suggest something practical for you to consider:

- Perhaps a scoping exercise of the content within your own Religious Institute to identify which elements are applicable to creating safe environments both during initial formation and ongoing formation
- The exercise should include the context: if this specifically includes child protection or safeguarding training, is this in a stand-alone session? Is it repetitive or does it develop? It is generic or specific to the charism of the Religious Institute?
- Reflect upon what are your transferable skills. So often there is anxiety about creating safe environments because of the difficulty (and fear) of doing or saying the wrong thing.

Please do remember, that this is a process and a journey which we are walking together but not alone because He, the One who is a constant companion to us is on that same road to Emmaus.

And to conclude with some words of Pope Francis:

“Each day offers us a new opportunity, a new possibility.....we need only have a pure and simple desire to be a people, a community, constant and tireless in the effort to include, integrate and lift up the fallen. We may often find ourselves succumbing to the mentality of the violent, the blindly ambitious, those who spread mistrust and lies. Others may continue to view politics or the economy as an arena for their own power plays. For our part, let us foster what is good and place ourselves at its service.”^x

In closing my hope and my prayer for you is that you have strong and skilled Formators who will accompany and mould those in formation to become women and men religious who live lives of deep joy and living witnesses to safe environments as they progress in ‘the school of the heart’.

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- ⁱ Zollner H Formation of Priests: Assessing the Past, Reflecting on the Present, Imagining the Future in Models of Priestly Formation Ed: Marmion D et al Liturgical Press 2019
- ⁱⁱ Nwobi PU Poor Formation as a Principal Factor to the Crisis in Priesthood Today AuthorHouse 2012
- ⁱⁱⁱ Falkenhain JM How We Love Liturgical Press 2019
- ^{iv} ibid
- ^v Lespnay G Vocations and their formation today St Pauls 2009
- ^{vi} Pope John Paul II Pastores Dabo Vobis 1992:44
- ^{vii} Falkenhain JM How we love Liturgical Press 2019
- ^{viii} Escurzon MA Formation, Initial and Ongoing St Pauls 1980
- ^{ix} Nwobi PU Poor Formation as a Principal Factor to the Crisis in Priestly Formation Today AuthorHouse 2012
- ^x Pope Francis Fratelli Tutti 2020