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exchanges * échanges * intercambios N° 23
September, 1981

PLANNING OUR APOSTOLATE

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THIS ISSUE

As announced in our last issue (cf. p. 66), this is a special number dedicated to the planning process in the Vice-Province of BOLIVIA. It aims to provide a concrete example of the type of social analysis we spoke about in PJ 21.

We have chosen Bolivia not because we consider its planning process to be the only or even the best one. There are certainly many others that have and are being used elsewhere. Nor are the results necessarily perfect even for the VP of Bolivia itself. When finally presented to Rome, they elicited a long and careful letter from Father General suggesting a number of corrections and shifts in emphasis.

However here we are concerned not so much with the orientation or content of the planning as with the methods used to carry it out. In this respect we believe the Bolivian example can be of use to others. Admittedly with certain advantages (small numbers, outside pressures, etc.), it was successful in mobilizing some 97% of its membership in a process that took place over 5 years. More important, by emphasising the need for a fundamental option (the Overall Objective) before detailed planning, it achieved a high degree of unity which should be a great help for future implementation. For, as Fr. General pointed out to the Congregation of Procurators: *In the light of this option and using these means, the Congregation expects us to re-evaluate our apostolic links and commitments.* (Allocutio Finalis, Acta Romana XVII, p. 541, § 5)

After some brief data on Bolivia itself, we publish 3 diagrams and a graph drawn up by the members of the Planning Commission to explain their methodology and chart the actual course that was followed. Then comes the Final Report of the Commission which recounts in greater detail and attempts to evaluate what was done. Finally we present an analysis of the 3 principal documents that marked the 3 main stages of the planning emphasising in each case methodology rather than content. We repeat the aim is not to offer the concrete results (for example, the faith-justice relationship outlined in the preamble to Specific Policies) as necessarily correct or to be imitated, but to suggest that the process or some modification of it is worthy of serious examination by any Province concerned with planning.

The issue ends with two brief articles on methodology taken from the process initiated in 1979 by the Jesuit Conference Board in the USA.

We are well aware that this issue is dry and difficult to read. Our defense is twofold: first, it is meant to be used rather than read for interest. We hope it will provoke some reaction from the many dedicated Jesuits who have been struggling to implement the demands of GC 32 with regards to planning and renewal. Secondly, we hope to lure back those readers we might lose by our next (December) issue which will be a general one carrying, among other things, an account of the Assistancy Seminar in Manila on Social Analysis and Theological Reflection.

 BOLIVIA TODAY

THE COUNTRY

- Area: 1,098,581 sq. kms. - that is, the 27th. country in the world and more than 4 times the size of the UK.
- Population: 5,570,000 - that is, the 79th. country in the world with a density of about 5 per sq. km.
- Race: Indian 54% (Quechua 33%, Aymara 21%), Mestizo 32%, European (mainly Spanish) 14%.
- Work Force: c. 1,500,000 of which 54% in agriculture.
- Production: Gross National Product (1978) = c. US\$ 2,690,000,000 of which: agriculture 15%, mining 17%, industry 12%.
- Foreign Trade: (1979) Exports = US\$ 761,000,000 (of which 63% mineral, mainly tin): Imports = US\$ 1,011,000,000. It is estimated that traffic in cocaine produces between US\$ 500 and 1,000 million.
- Income per capita: (1978) c. US\$ 510, one of the lowest in Latin America.
- Inflation: c. 20% in 1979.
- Literacy: c. 40% illiterate.
- Life expectancy: 46.8 years
- Government: Military Dictatorship: the last coup d'état (there have been 189 in 155 years of independence) took place in 1980 with several hundred dead.

THE SOCIETY

		<u>PP</u>	<u>SS</u>	<u>FF</u>	<u>UNIV</u>
La Paz	Curia VP	-	-	-	-
La Paz	Bishop's Residence	1	-	-	1
Cochabamba	Col. NN, Parroq., Dom Prob.				
	Col. Juan 23	10	12	1	23
Cochabamba	Resid-Parroq.	2	-	4	6
Cochabamba	Resid. Mayor	10	-	1	11
Cochabamba	Parroq.	2	-	1	3
La Paz	Col.San Calixto	15	-	5	20
La Paz	Col.San Ignacio	5	-	-	5
La Paz	Parroq.	3	-	-	3
La Paz	Corpa - Parroq.	1	-	-	1
Oruro	Parroq. - Technical School	3	-	1	4
Oruro	Resid.	2	-	-	2
Oruro	Machacamarcha - Parroq.	2	-	-	2
Potosi	Parroq.	3	-	-	3
Santa Cruz	Parroq. - Resid.	5	-	2	7
Santa Cruz	Statio	3	-	-	1
Santa Cruz	Col. S. Juan Iapacani	1	-	-	1
Santa Cruz	Charagua, Parroq.	5	1	-	6
Sucre	Colegio Sagrado Corazón	13	-	1	14
Sucre	Parroq.	3	-	1	4
	In the territory of the VP	89	13	18	120
	In other Provinces	19	2	5	26
	<u>Total</u>	<u>108</u>	<u>15</u>	<u>23</u>	<u>146</u>

THE PROCESS

In an attempt to find a method for our planning, we looked at the experiences of other Provinces.

We saw some that resemble Model A. Here all the work is done from the "summit" and a very coherent plan achieved, but it is rejected by the "rank and file" who look on the Planning Commission as a pressure group, a parallel authority, etc. It becomes difficult to avoid a "breakdown" in the process when it comes to implementation, and so the plan is never fulfilled.

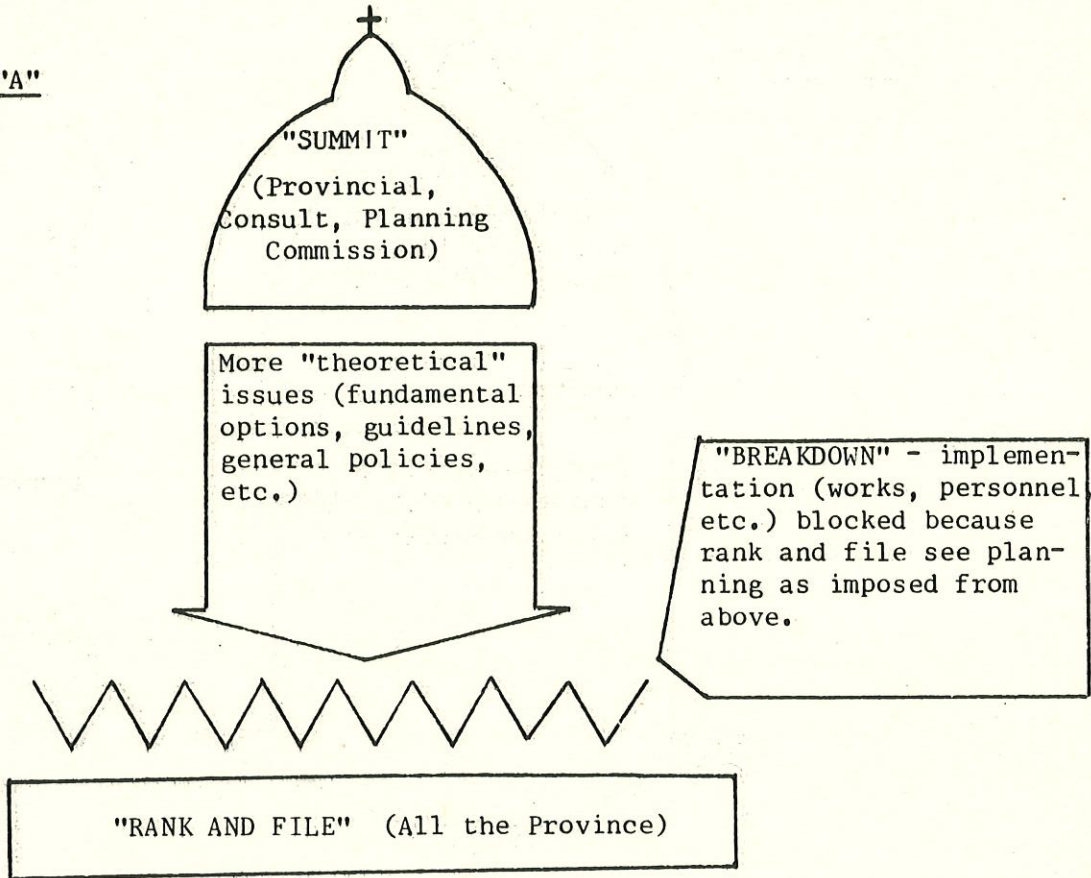
Other experiences resemble Model B. Here there is success in creating an atmosphere of evaluation and planning in each work with the result that each improves notably. However, as a whole, they are not submitted to a more radical questioning based on the fundamental options which stem from GC 32 and question the Province as such.

So from the experience of others, we learnt that the essence of planning consists in an interaction between the summit, which must exist and has its proper role in any planning process, and the rank and file which should be and feel themselves to be agents of planning. We try to show this very obvious conclusion in Model C. In fact, we had to create our method as we went along. The result was a very long process (5 years) but which, far from exhausting the VProvince, got it more and more involved.

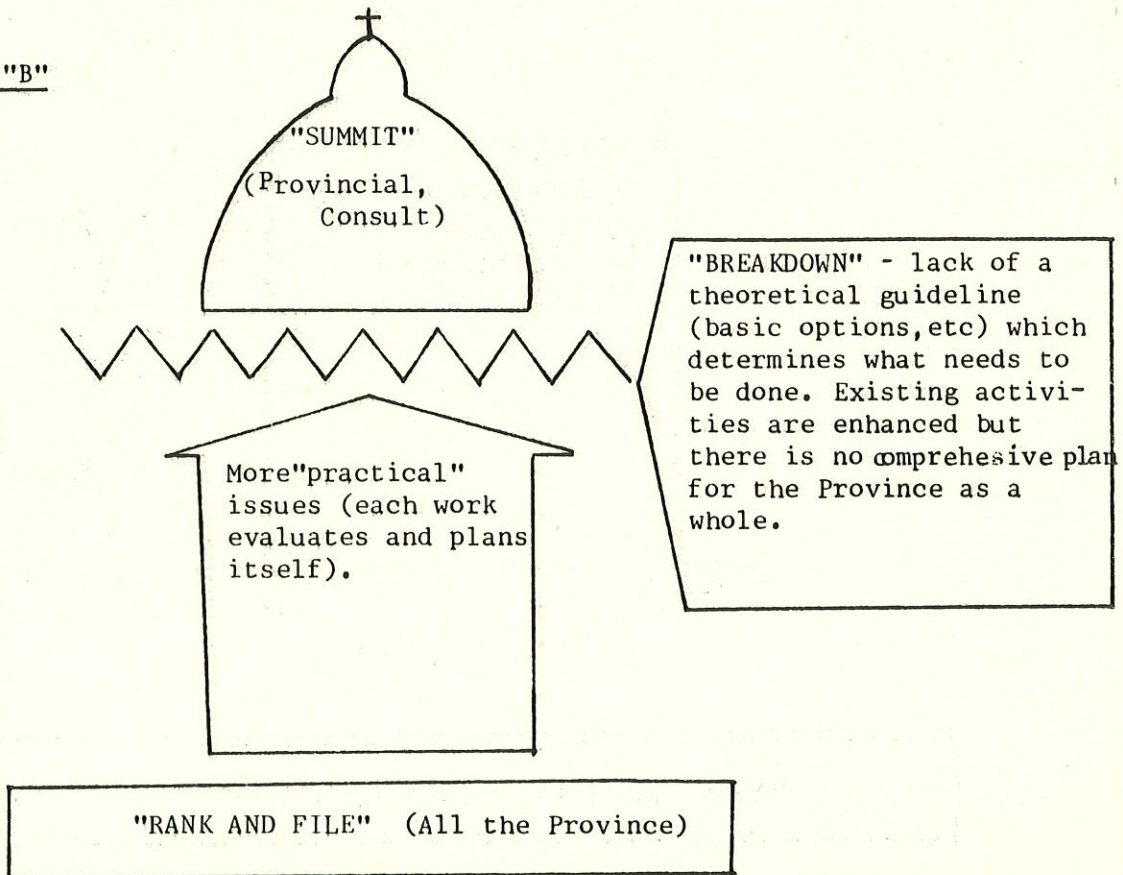
The many comings and goings between summit and rank and file are shown in the graph which follows the three models. All this has been possible thanks to the fact that there exists in the Province considerable good will, dialogue, discernment, friendship, living contact with a conflictive situation, a non-authoritarian exercise of authority, etc. We have also been helped by a series of outside events - assassination of Luis Espinal, imprisonment, exile, raids, etc.

THREE MODELS

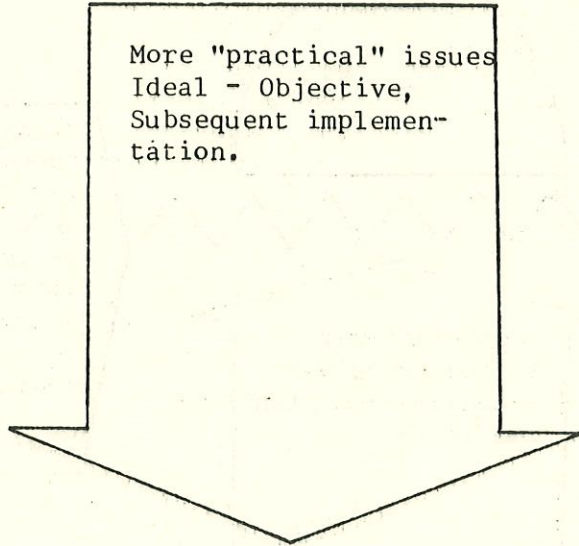
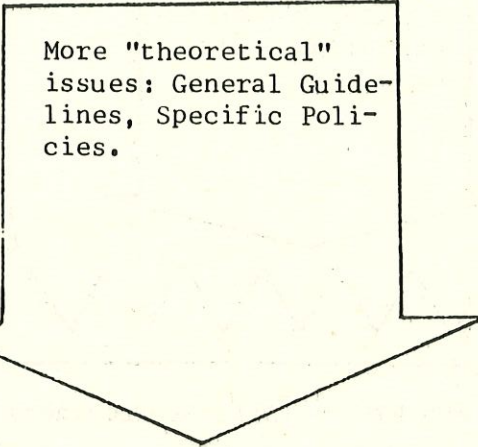
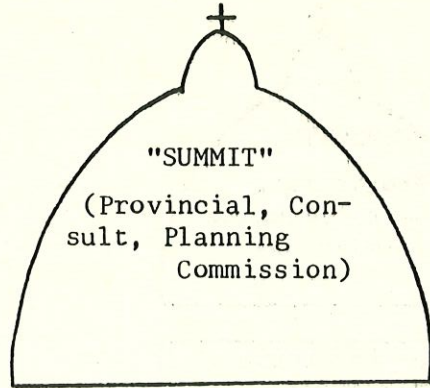
MODEL "A"



MODEL "B"



MODEL "C"



Ongoing contribution from rank and file (willingness to plan, discernment, criticism, surveys, creativity etc.) at each stage of the planning process.

"RANK AND FILE" (All the Province)

TRAJECTORY

STAGES	DATES	Planning Commission	Work Groups	Provincial & Consult	Enlarged Consult	Individual & Communities	Province Assembly
Desire to plan and appointment of co-ordinator.	Jan. '76			■			○
2 Elaboration of method.	Mar. - Sep. '76	a ○	○	■		○	
3 Preparatory work on General Guidelines.	Oct. '77 - Oct. '78	a ○	○	■		○	

STAGES	DATES	Planning Commission	Work Groups	Provincial & Consult	Enlarged Consult	Individual & Commu- ties	Province Assembly
<p>4</p> <p>Compo- sition of Gen- eral Guide- lines.</p>	<p>Nov. '78 - May '79</p>						
<p>5</p> <p>Elabor- ation of the Specific policies</p>	<p>Jun. '79 - Nov. '80.</p>						

STAGES	DATES	Planning Commission	Work Groups	Provincial & Consult	Enlarged Consult	Individ. & Communities	Province Assembly
6 Elaboration of the Ideal Objective for 1988.	Aug. '80 - ...	○		○		○	○ ^e
		○			○ ^f		○ ^g
TOTAL HOURS OF WORK		800					110

NOTES: ■ Means final approval.

- a. These initial steps were taken by the co-ordinator alone because the Planning Commission was only set up in September 1977 (on the basis of names suggested in the January 1976 Province Assembly).
- b. The first part of the Assembly consisted in an 8-day Seminar directed by a team from CLAR (Conference of Latin American Religious).
- c. The whole Province met by occupational sectors (pastoral, education, social, communications).
- d. 5-day meeting: Provincial and Consult, Planning Commission, Sector Commissions, some invited members.
- e. The whole Province met by geographic zones because the political situation made it difficult to hold one big meeting.
- f. 2-day meeting: Provincial and Consult, Planning Commission, delegates from the geographic zones and occupational areas named in the previous meetings.
- g. As of March 1981 the remaining steps are: redrafting by the Planning Commission and submission to Provincial and Consult for the final approval. At the same time all the material has been sent to Father General for his comments and approval. Then comes the implementation.

 FINAL REPORT

The course followed by the planning process in the Vice-Province is explained in greater detail in the Final Report submitted by the Planning Commission at the end of its labours on March 15th., 1981. A second section attempts to evaluate what was done and the Report ends with some recommendations. We give it here in full, merely omitting personal names.

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1 - A BIT OF HISTORY

1.1 Antecedents

At the VProvince meeting which took place in Cochabamba at the beginning 1976, we Jesuits in Bolivia saw the great need to meet the demands of the GC 31 and 32 and the wishes of Father General to start planning our apostolic work.

It also seemed fitting to free a Jesuit who could set in motion the activities required for planning and the majority suggested the name of Claudio Pou. At the same time we felt the need to name a commission for which several names were suggested. Fr. Antonio Menacho, Vice-Provincial, named Claudio Pou as coordinator of the Planning Commission and also its various members.

During the second half of 1976 the Coordinator visited several Jesuit Provinces in North America and Europe to take a look at the process they had followed.

1.2 First activities

1.2.1 In March 1977 Claudio presented his first report to Fr. Victor Blajot, Vice-Provincial, and his Consult. Then, in May the same year, he drew up a "First Planning Outline for the Vice-Province". After being revised by a group of 10 Jesuits, a second version was sent in July to all Jesuits in Bolivia so that, individually or in community, they could send in their observations. On the basis of these, a third version was drawn up, examined by the consultors and approved by Fr. Vice-Provincial in September 1977.

1.2.2 In November 1977, four working groups were constituted. The first was to

study the theological and spiritual aspects of the Guidelines. Team 2 was to study their socio-political aspects. Team 3 was to concentrate on human resources in the Vice-Province. And team 4 was to set up terms of reference for ongoing training in the Vice-Province. This last team also prepared the seminar with CLAR (Latin American Conference of Religious) which took place in November 1973.

- 1.2.3 In February 1978, a questionnaire was sent to all Jesuits living in Bolivia asking them to describe the public with whom they were working and the type of training they had for such work. At the same time an attempt was made to look at the state of ongoing formation in the Vice-Province. The same month a new team was set up to identify "elements for evaluating a radio station".
- 1.2.4 In April all Jesuits were sent a draft document "Notes on the theological aspects of the General Guidelines". The study of human resources in the Vice-Province was continued by sending various questionnaires concerning knowledge of languages, founding of parishes, and types of students in our colleges. In June 1973, the Planning Coordinator submitted to Fr. Vice-Provincial and his Consult a study "On restructuring the Vice-Province Commissions". In July Fr. Vice-Provincial sent all Jesuits in Bolivia a "Circular to the Jesuits of the Vice-Province on naming Delegates and Commissions".
- 1.2.5 In June 1978 the preparatory documents for the "General Guidelines for the Vice-Province" were submitted to Fr. Vice-Provincial and his Consult. The document "Bolivian Society" was approved, but those concerning the "Church in Bolivia" and the "Society of Jesus in Bolivia" were sent for re-drafting. In August all Jesuits in the Vice-Province were sent "Aid for reflection on preparing the fourth part of the 'General Guidelines for the Vice-Province'". Around the same time data from the questionnaires was published as "The Vice-Province in figures".

1.3 The CLAR Seminar

- 1.3.1 An important stage in the Vice-Province Planning were two weeks of meetings in Cochabamba from November 20th. to December 1st 1978, of almost all the Jesuits in Bolivia. For the first part we were helped by the international CLAR team (Cecilio de Lora, Ricardo Antoncich SJ, y João Bta. Libanio SJ) which facilitated intensive group discussion on the already existing preparatory document as well as identifying basic material for the 'Utopia' and 'Overall Objective', core of the planning process. This was followed by a General Assembly of the Vice-Province to deepen some themes and plot the future work of the new Planning Commission. Its first task was to put into final form the General Guidelines in the light of all the contributions from the various sessions. The first version of February 1979 was submitted

to the Consult and all communities for their observations. As soon as these were studied and incorporated, Fr. Vice-Provincial, with the agreement of his consultors, approved the "General Planning Guidelines for the Vice-Province" which was published in May 1979.

- 1.3.2 In order to establish policies and strategies for different sectors of apostolic activity, sector meetings were held in June 1979 for pastoral work, education, social apostolate and means of social communication. At the same time a questionnaire on community life was sent to all Jesuits as preparation for drawing up guidelines on community.
- 1.3.3 While processing the sector documents which resulted from the July meeting (attended by 75% of the Jesuits in the VP), the Planning Commission realized that several areas were overlapping. In addition, some works belonged to more than one sector while it was not easy to see which sector others belonged to. We therefore questioned whether it was still useful to classify works by sectors. On the other hand it was obvious our apostolic activities share one or more of the following dimensions: pastoral, educative, social, communications, research and assistance. The organizational aspects needed for any activity should to be added. As a result, we adopted a classification by dimensions rather than sectors.

1.4 Specific Policies

- 1.4.1 To re-orientate our work in line with this new emphasis on dimensions, we called a meeting in Santa Vera Cruz (Cochabamba) from January 5 - 10, 1980 which was attended by Fr. Vice-Provincial with his consultors, the Sector Commissions, the Planning Commission and the few others specially invited. The result of the meeting was a text "First Version of Specific Policies for Evangelization" and a draft of Strategies, both of which were handed over to the Planning Commission.
- 1.4.2 In February 1980, the Planning Commission processed this material, added its own contribution, and sent to all Jesuits in the Vice-Province a draft document "Specific Policies". In April the Planning Commission incorporated observations received from the Consultors, communities and individuals and submitted a new version to Fr. Vice-Provincial and his Consult. This new version was again amended in the light of suggestions from various communities and individuals. Only at the end of November could the definitive text of Specific Policies be finally approved.

1.5 Ideal - Objective 1988

- 1.5.1 Meanwhile the Planning Commission had been engaged in a new task, It was to gather suggestions from the "General Guidelines" and the "Specific

Policies" into an "Ideal - Objective" which would sketch a picture of the Vice-Province in 1988 with regard to both apostolic institutions and community life.

The year 1988 was chosen because it represented a new 10 year stage in the life of our Vice-Province. For the Bolivian Vice-Province was separated from that of Paraguay in 1958, the Survey of 1968 set it on its course, the present planning process started in 1978, and hopefully some of its results would be visible by 1988.

1.5.2 The draft version of the Ideal - Objective 1988 concerned with works was sent to all Jesuits in Bolivia at the beginning of January 1981, and that concerned with communities at the beginning of February.

1.5.3 At the end of February and the beginning of March 1981 various meetings were held by regions: 1) Chuquisaca-Potosí, 2) Santa Cruz, 3) Cochabamba, 4) Oruro-La Paz.

The aim of these meetings was to assimilate planning documents already approved by the Vice-Provincial (General Guidelines and Specific Policies) and to sound out opinion on the Ideal - Objective. The meetings were held in a climate of prayer and on-going discernment, both personal and in community. Fr. Jose María Rambla, on a visit to Bolivia, gave much help in the running them. 97% of all Jesuits in Bolivia took part, the only absentees being those who were sick.

1.5.4 The general lines of the Ideal - Objective were accepted, though various changes, additions and subtractions were suggested. These were examined and incorporated into text by the Planning Commission together with Fr. Vice-Provincial, his Consultors and delegates from the regional and sector meetings who came together in La Paz on March 9 - 10, 1981.

2 - EVALUATION OF THE WORK DONE

2.1 Task completed

2.1.1 In the "Initial draft on Planning in the Vice-Province" the procedure to be followed was described in four stages:

- 1) Creative Utopia.
- 2) Strategy: objectives, policies, aims.
- 3) Tactics: inventory of resources, obstacles, methods.
- 4) Evaluation, reflection.

Later it was decided that the job of the Planning Commission would be limited to the first two stages, while the third and fourth could be entrusted to a future Commission for Execution and Evaluation of the planning process.

2.1.2 The General Guidelines, drawn up on the basis of documents prepared by various groups of Jesuits and with the contribution of the CLAR Seminar, covers the first stage and the beginning of the second. Its four parts are: criteria, creative utopia, overall objective and general policies.

The Specific Policies and the Ideal - Objective 1988 cover the second part of the second stage, ending with a description of how the Vice-Province should be in 1988, with regard to its works and its communities.

With these documents therefore the Planning Commission completed the task assigned to it.

2.2 General Methodology

2.2.1 The "Initial Draft" spoke of arriving at a "Common ideal which would be shared by virtually all in the Vice-Province and some objectives also accepted by all" (1.3). Experiences of other Provinces which have undertaken a process similar to our own show that it is not easy to reach this point. A balance must be found between two needs that are difficult to combine. On the one hand, the need that the whole process should be coherent and in agreement with the line traced by GC 32: for this intensive work by a small group or team is necessary. On the other hand, the need for continual interaction with all members of the Vice-Province so that no one feels left out, all are able to present their points of view and eventually accept the end-result. If too much emphasis is placed on the first need, there is the risk of a plan being imposed from above and doomed to failure through lack of acceptance and participation. But if only the second need is emphasised, it is highly likely an overall plan will never emerge and there will be little more than a certain mutual understanding and acceptance.

2.2.2 We tried to achieve a balance in the following ways:

- a) The composition of the Planning Commission itself. We sought the participation of Jesuits who accepted the idea of planning according to the principals of GC 32 and represented different types of work, specializations and tendencies so that the greater part of the VP could feel itself sufficiently represented.
- b) Continual interchanges between the Commission, organs of government in the VP and all its members. There have been many types of interchange from general assemblies of the whole Vice-Province to written consultations with different communities and personal visits to Jesuits who expressed more specific objections. The following figures give an idea of the importance we attached to this:

- 2 Province Assemblies
 - 2 Meetings by sectors
 - 13 Provisional drafts (4 of the G.G., 6 of the S.P. and 3 of I-0) before reaching definitive versions.
 - 136 Amendments from communities, groups or individuals were received and studied.
 - 70,200 Mimeographed sheets in order to produce a combined document of 106 pages (G.G., S.P., I-0), without counting preliminary documents.
 - 800 Hours of meetings by the Planning Commission.
 - 225 Hours of meetings with others groups
 - 110 Hours of meetings by the whole Vice-Province.
- c) The combination of the more technical aspects of planning with group dynamics and, especially, an atmosphere of prayer and spiritual discernment both by individuals and communities.
- d) In crucial moments at the beginning and end of the process we were able to count on help from people outside the Vice-Province who acted as impartial animators to help the disturbed and facilitate constructive dialogue.

2.2.3 Although at times there were tensions and mistrust on the part of some Jesuits, the participation of 97% in the final phase and the optimism generated throughout the Vice-Province is a sign of what has been achieved so far. Obviously there is a danger that, behind this collective enthusiasm, entrenched ideas and positions will still persist especially when painful decisions have to be made. However, it can be affirmed that at present the majority accept the lines laid down and there is a general desire to reach tangible results.

2.2.4 We believe the method used has enabled Jesuits in Bolivia to express their collective creativity without bypassing criticism of our institutional situation. It will help the future work of Fr. Vice-Provincial, his consultants and the delegates and commissions which must identify specific strategies to carry out the plan. The efforts, sacrifices, re-learning, on-going self evaluation and changes of mentality will be less painful for the knowledge that all have taken part in seeking an objective that can already be known with certain clarity and which has been accepted by virtually the whole of the Vice-Province.

2.3 Some particular points

To end this evaluation we wish to draw attention to some more specific points we consider useful for the future.

2.3.1 The rythm of the Commission's work. Apart from the coordinator of the Planning Commission who was partly freed from other activities (in spite

of also being VP treasurer), all the other members continued in their full-time occupations. This has meant that the Commission's meetings have been held at week-ends and as often as other work permitted. Travelling problems have been shared by holding meetings in different houses of the VP. But there have been difficulties such as the long distances some have had to travel and returning to discussions after interruptions of two months. Experience has shown more is achieved through somewhat larger and more frequent meetings cut off from ordinary occupations. But these have not always been possible.

2.3.2 Changes in Methodology. When we set out we had no suitable model to follow. As a rule our methodology developed as we went along. This meant some modifications of what we initially thought correct. Continual interchange between the Commission and most members of the VP has also led to certain changes both in the path followed and the initial work schedule. However on the whole we can say the original time schedule has been maintained. The principal changes have been:

- a) A consultative meeting at national level to decide, among other things, the change from sectors to dimensions.
- b) The addition of the Ideal - Objective to establish goals with a definite time limit and provide an instrument for evaluation. At the same time this led to a re-classification of works on a socio-geographical basis closer to our reality.

2.3.3 Feed-back techniques. In addition to normal means such as meetings and sending study material, we have used other feed-back techniques which have proved very fruitful such as: visits by Commission members to communities or individuals, brain-storming sessions to collect as many suggestions as possible, personal card-indexes for surveys, card-indexes for amendments in the texts, etc.

2.4 The Church and the Society in Bolivia

At the regional meetings in Cochabamba and La Paz we found a marked similarity between our Ideal-Objective 1988 and the Joint Pastoral Plan drawn up in 1980 by the Bishops of Bolivia. Our planning process will therefore enable us to serve the Bolivian Church along the lines laid down by the Bishops.

2.5 Feasible dream ?

At the outset the Ideal-Objective was not drawn up on the basis of our present works but as a reply to the apostolic needs identified in the General Guidelines and Specific Policies for Evangelization. Now some account has been taken of resources and initiatives both present and foreseeable in the near future. In this encounter between dream and reality perhaps something of the ideal has

been sacrificed on the altars of a realism that could have been a little more bold.

3. RECOMMENDATIONS

3.1 Restructuring Vice-Province Commissions

In the enlarged meeting of the Planning Commission held in La Paz on March 9 and 10, 1981, various suggestions were offered for restructuring the Vice-Province Commissions along the lines in the Ideal-Objective.

3.1.1 Commissions by dimensions

The present six commissions with their members will continue to operate: formation, education, social communication, pastoral and social.

The Formation Commission should be completed by some formadores and representatives of each of the areas indicated in the Ideal-Objective. This should facilitate formation in function of the mission that will be given to those in training.

The remaining commissions will also be enlarged with a representative from each of the areas: rural, urban-popular, urban-general, and perhaps specialized works. The composition of the social communications commission is not yet decided since it seems to require a different structure from the others.

The Delegate to the different commissions will be named by the Superiors.

3.1.2 Subcommissions by areas

In order to make the Ideal-Objective more operative subcommissions by areas should be set up composed of the same members but grouped this time according to area of work. There will thus be the following subcommissions: rural, urban-popular, urban-general and specialized works. Fr. Vice-Provincial will nominate a Coordinator for these subcommissions who could be the same as the Delegate mention above.

3.1.3 Implementation and Evaluation Commission

It will be composed of the members of the area subcommissions. Its work is to help the whole VP, works and communities, to get moving so that the Ideal - Objective can become reality in 1988. To achieve this it will be necessary to draw up evaluation norms for works, elaborate strategies to help each work become what it should be, promote the integration of works that should be connected, and encourage the founding of new works mentioned in the Ideal-Objective but which do not yet exist. At the same time it

should study how to help communities place themselves at the service of mission (place, number of Jesuits in each community, composition, etc.)

The four Coordinators of the area subcommissions will form an Executive Committee whose work will be to relate the subcommittees with each other and thus encourage the work of each.

And to make all this effort effective, it will be necessary to have a general coordinator, partly freed from other work, who can be one of the four area coordinators.

3.2 Other Recommendations

We mention here a few of the recommendations for the future made in the enlarged meeting of the Planning Commission.

- 3.2.1 If the planning process is to achieve its results, it will be necessary to maintain a climate of dialogue, community discernment and prayer. As concrete methods we propose assemblies of the whole VP, regional and area meetings.
- 3.2.2 On-going formation for all seems very important and this is closely linked to the previous point.
- 3.2.3 The work of each Jesuit must be examined so that the priorities of individuals conform with those of the whole VP. Respect must be shown for personal charisms, but not in such a way that they are totally exempt from planning.
- 3.2.4 Fr. Vice-Provincial is requested to see that the implementation commission begins its work as soon as possible.

La Paz, 15 March 1981.

 THREE DOCUMENTS

We give below a summary of the three documents which constitute the concrete result of the planning process and mark its three principal stages. Once again it should be born in mind that we are not concerned so much with the detailed conclusions of each but rather in the themes treated and the methods used.

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1 : GENERAL GUIDELINES
INTRODUCTION

 1. Aim

The aim of the General Guidelines is well expressed in a brief statement at the outset: *In order to respond to the call of GC 32, the updated expression of our Founder's charism, we Jesuits in Bolivia propose the following GG to guide our life and work in the coming years.*

 2. Preliminaries

They were of three types:

- Documentation: *The GG were preceded over the course of a year by 5 working documents which resulted from the efforts of several teams of Jesuits and lay people and gave rise to much reflection and sharing in the Vice-Province.*
- The Cochabamba Meeting: which was attended by 70% of the Jesuits in the country and which drew up the 'Overall Objective'. *The most tangible result of the meeting in the planning field was the analisis of seven themes that the assembled jesuits considered most important for the work of the VP in coming years.*
- The Province Assembly: which followed on afterwards.

 3. Vocabulary

It is worth explaining the meaning we give to some of the technical terms used:

- The Planning we are aiming at in the VP can be described as 'central' or 'imperative', because it accepts the existence of an organism (the Provincial with his Consult, Delegates, Commissions, Community Superiors and Directors of works) which has authority over all other groups and activities etc., once definite decisions have been reached and need to be implemented. Explicitly excluded is an 'indicative' type of planning which indicates desirable paths of action but restricts itself to pointing out incentives and disincentives so that different groups can react to them and make their own options. Also excluded, with even greater reason, is so-called 'projected' planning which merely shows, on the basis of available information, what paths action is likely to take and where it will lead; since it doesn't seek to influence action, it should not be called planning but rather part of the analysis.
- The General Guidelines is the document which develops the fundamental option of GC 32 and which will guide the personal, community and institutional commitment of the VP in the coming years. It is general because, in later planning stages, it will be applied to different sectors of apostolic activity and the various works of Jesuits in Bolivia. It is intended to be an instrument for action, and therefore one should not expect a theological, socio-political or spiritual treatise. It contains a Diagnosis, a Utopia, an Overall Objective and some Policies, all of which are meant to guide similar statements that can be applied to each apostolic sector and work.
- The Diagnosis; which results from an analysis of the situation, brings together the conflictive structural elements most relevant to the VP's planning process.
- The Utopia is the great dream or vision of the future which, though it will never be fully realized, inspires action and gives it its ultimate meaning. It is the fundamental 'why' of action. Because the idea impels, it is sometimes called a Creative Utopia. In our case we distinguish two levels of utopia: the level of society in general for which we constructed a utopia in the strict sense; and the level of the Church and Society of Jesus for which we proposed a model that, though still in a distant future, was more within reach of our possibilities.
- The Overall Objective is the aim that should be present in all our efforts in the different apostolic sectors and works. It is the 'what for' of our action.
- The Policies state the main lines of action that lead to the objective. They show in general what the VP should do in order to move toward its overall objective, but they leave to each apostolic sector and work the choice of specific strategies: types of action, methods, etc. The policies

are the 'what' of our action, but not yet the 'how'.

(1) DIAGNOSIS

This presents the results of our social analysis of reality in the various areas in which it was carried out. The document concentrated on three:

- Society,
- The Church,
- The Society of Jesus.

Because they deal with Bolivian society in detail, we do not give here the results achieved. However they were extremely important for the later planning stages.

(2) UTOPIA

This sets out in the same three areas the proposed ideals. They are as follows:

1. Society

We wish to contribute to the building of a society which, while respecting the peculiarities of the country and its regions, will be free, equal, cooperative and participative; helped by all and serving all:

- *A society to which all contribute according to their capabilities and from which all receive according to their needs, without inequalities or the monopoly by some at the expense of others.*
- *A society in which those who contribute in productive processes through their work hold the power of decision over the means of production, except for the subsidiary function of the State.*
- *A society which directs its resources to meet the real needs of all its members.*
- *A society in which all the human and political rights of its members, groups and organisations are respected.*
- *A society in which all, aware of their situation and the mechanisms for change, become agents of their own destiny.*
- *A society in which all feel the joy of knowing they are sons of God, freed by Him, and brothers among themselves.*

2. The Church

To move toward such a society we must strive to build:

- *A Church that is the People of God because the power of the Spirit comes from the people and proclaims the Good News.*
- *A Church whose pastors, successors of the apostles, constantly strengthen it in faith and service to the brethren.*
- *A Church which builds up a christian society and whose faith becomes a ferment making it more human.*
- *A Church to serve the hopes of all men and against all that enslaves them.*
- *A Church that is unconditionally on the side of the poor and identified with the oppressed and their struggle for justice.*
- *A Church which proclaims the Good News through the temporal commitments of its members.*
- *A Church which is constantly enriching its message through a respectful reading of the signs of the times and of different cultures.*
- *A Church which celebrates the death and resurrection of Christ as a community at each step of the people's life.*

3. The Society of Jesus

Within this Church we hope to be a Society of Bolivian Jesuits that will constitute:

- *A universal Society, capable of sending Bolivian Jesuits to other countries and of welcoming in Bolivia Jesuits from anywhere to help in our mission.*
- *A Society inculturated in Bolivia though formed by Jesuits from any culture or social class.*
- *A Society which works together with the local Church and thus serves the universal Church under the successor of Peter.*
- *A Society whose evangelizing work proclaims that God's Kingdom is realized in a faith that does justice.*

- *A Society in solidarity with the poor, which walks patiently and humbly with them, listening to and serving them.*
- *A Society which defends the cause of the poor with actions to promote their integral liberation and enable themselves to assume control over their own destiny.*
- *A Society of men in solidarity among themselves and ready for the insecurities and risks of their mission, accepting that their ultimate security is Christ, poor and crucified.*
- *A Society continually questioning the power that comes from the instruments needed to carry out its mission and which, in humble solidarity with the poor, is itself of all that is not needed for the better service of justice as an expression of faith.*
- *A Society which, however much dispersed because of its work, is a community of 'friends in the Lord', and in which the local community is but a concrete, though privileged, expression of that brotherhood spread over the world which is the Society of Jesus.*
- *A Society whose being and mission is a living communal expression and personal realization of every Jesuit's faith in Jesus.*
- *A Society whose local communities are characterised by sincere interpersonal relationships of friendliness and brotherhood, guided by discernment, share what they are and have with other communities, with the poor and those who build justice, provide for its members an atmosphere of prayer, remain available for mission, and find in the Eucharist their strength and fulfillment.*

(3) OVERALL OBJECTIVE

This constitutes the fundamental option of the VP that will enable it to move towards its utopia. It is as brief as it is important:

To move toward a Society of Jesus that is

- *Bolivian,*
- *inculturated,*
- *built of communities of faith and discernment,*
- *committed as part of the Church to evangelize the poor,*
- *and prepared to accompany them in their struggles, working for Justice as an expression of Faith.*

(4) POLICIES

The policies to achieve this objective relate to six fields of action:

- *Work of evangelization.*
- *Collaboration with the laity.*
- *Our way of life.*
- *Vocations.*
- *Training of young Jesuits.*
- *Ongoing formation.*

2 : SPECIFIC POLICIESINTRODUCTION1. Aim

The aim of this second document is to set out the Specific Policies of the VP, that is, to develop and apply the General Policies mentioned above in the General Guidelines. Since these consist in specific applications to the Bolivian situation, we will not reproduce them here. However the document contains an interesting preamble on the inseparability of Faith and Justice that we give in full. Its importance lies in its insistence that, faced with various interpretations, a Province must try to achieve the highest degree of unanimity it can. The reason is obvious: *there will be greater community among us the more we agree on the model according to which we understand and carry out our mission.* Only in this way will the overall objective effectively become the basic option required by GC 32, an option understood in depth and shared by all.

2. A new approach

Before the preamble, the document explains an interesting change in classification:

- *While processing the Social Documents, the Planning Commission realized there was a fair amount of over-lapping in their contents. In addition, some works belonged to several sectors, while it was difficult to see what sector some others should be put in. So we wondered if classification by sectors was still realistic. It was noted that, though this classification had become traditional, even in the past it had not always worked. We concluded that, at least for the planning process, it was no longer useful to classify works and individuals by sectors for each of which we had tried*

to draw up a semi-independent set of specific objectives and policies.

- It was however clear that our evangelizing work, whether institutionalized or not, shared one or more of the following dimensions: pastoral, social, educational, communications, research and charitable. To these must be added the organisational elements present in any form of activity. Thus we changed from classification by sectors to classification by dimensions.
- The principal advantages of planning activities according to dimensions seem to be the following: (a) all forms of activity benefit, whether 'works' or not, because they can seek inspiration according to their various dimensions: pastoral, social, etc.; (b) certain 'common denominators' emerge which help to orientate our activities towards the VP's overall objective and bring them in line with the General Policies; (c) no task of evangelization, 'work' or not, feels excluded from the Planning Process; (d) it will be easier to set up criteria for evaluation since the various dimensions of each activity can be taken together.

PREAMBLE

1. Inseparability of Faith and Justice

- GC 32 clearly affirms that 'the service of Faith' and 'the promotion of Justice' constitute the present mission of the Society. It repeatedly insists that these two dimensions are inseparable.
- The difficulty in making this new orientation effective in our work is often due to the fact that we find it hard to accept, even theoretically, that the service of Faith and the promotion of Justice are inseparable.
- So, in addition to planning our activities, we need a change of mentality that will overcome this problem. For this we need to make an effort to understand correctly how the service of Faith and the promotion of Justice are inseparable.

2. Common models of interpretation

- All of us through background, education or habit, accept certain 'models' in the light of which we interpret the world and decide the course of our actions. Most of the time these models remain hidden within ourselves and our actions.
- As long as no situations arise which, because of their impact, complexity or consequences, change our mental and behavior models, these continue to function. But when such situations do occur, we realize the models we have

been using no longer serve their purpose: to interpret the world and decide our action in the light of new needs that arise.

- We find the impact, novelty or complexity of the new situation invalidates some of the models which up till now have helped us live and understand the relationship between the service of Faith and the promotion of Justice.
- So we change our mentality when, pressured by a new situation, we change our model of interpretation and behavior.
- We outline below possible stages in this mental journey regarding the inseparability between service of Faith and promotion of Justice. Such a journey takes place in the measure that different situations are experienced.

2.1. Juxtaposition model

- For some of us, rather than inseparability, it is a question of juxtaposition between service of the Faith and promotion of Justice. According to this model either a larger dose of social awareness is 'added' to the service of Faith (which we have been doing all along), or certain ideological concepts are incorporated into it without the actual promotion of justice making any change.
- If this model is followed, the eventual 'change in activity' that results from the planning process would probably not involve any 'change in mentality'.

2.2. Separation model

- Faced by the difficulty we experience in integrating service of Faith and promotion of Justice, we can also operate by separating in practice the two dimensions. Such a separation is justified by the facile belief and assertion that both dimensions will be united 'in the end'. An end, however, which is beyond our own efforts, and a unity which does not yet exist.
- Such a separation will either little by little convert service of Faith into a wholly other-worldly activity or lead promotion of Justice to absolutize the socio-political dimensions which are a necessary part of it.

2.3. Adaptation model

- Impressed by the urgency of the change brought about by social and

political factors, some of us may have introduced a justice dimension into our service of the Faith merely through an instinct to survive. We realize that, not to do so, would make our service of Faith no longer credible. So to continue preaching the Faith with some credibility, we adapt it to new situations.

- We must confess experience shows such 'adaptations' tend to be short-lived. They are born without roots and are soon discredited by history. It is not a question of expressing our service of Faith through promotion of Justice in order to survive but because this is the way to be Christians in the world today.

2.4. Definition model

- Some of us may want to 'see things clearly' before making any decision. In other words, we demand a clear definition of the terms service of Faith, promotion of Justice and, above all, of their inseparability. We may even believe we are able to 'identify the essence' of each of these terms and their relationship, or to 'define their biblical content'. But in reality this model seems to forget that the relationship between service of Faith and promotion of Justice is a dynamic one which takes place over time: that different political and ecclesial situations, different social situations require an ongoing integration of both dimensions.
- Bit by bit we will understand it is not a question of applying to different situations a ready-made concept of the relationship between service of Faith and promotion of Justice, but rather of trying to integrate them as we become involved in and confront such situations.
- In real life our activities are probably conditioned, though we may not realize this, by a mixture of elements from more than one model. The fact that one or elements of several dominate is due to the interaction in our past lives between our experiences, initiatives and goals.
- To change our mentality is precisely to become aware of all this and, along with external changes, 'convert' our internal models along the lines proposed by GC 32.

3. A New model

3.1. The unity between service of Faith and promotion of Justice: The Kingdom of God

- The 'Kingdom of God' is the reality which unifies and gives life to

to Faith and Justice in one process of building up 'the people of God' (as in the Old Testament) and of discipleship and evangelisation (as in the life and teaching of Jesus).

- The Kingdom of God becomes alive in time to the extent we assume our state of 'sons' and live together as 'brothers'. This expression of our brotherhood is the fulfillment here and now of that Kingdom which is 'of God' and which must therefore be inspired and guided by those values which are really from God. It is in this Kingdom of God that the transcendent and the historical, the vertical and horizontal dimensions of christian existence, become one. It is precisely in this interaction between 'building' the Kingdom and building it 'according to God' that Faith and Justice become united in time and reality.
- In other words: Justice is the way of 'building' the Kingdom, of bringing it to realization, Faith is the guarantee that it will be a Kingdom 'according to God', because its meaning comes from God.

3.2. Inseparability between service of Faith and promotion of Justice: Evangelisation

- The fact that the Kingdom of God is being formed in time and that in its formation Faith and Justice are becoming more unified is a clear indication that the 'Kingdom of God' is not merely something offered in promise or a gift at the end, but an ongoing process.
- This process is evangelisation in its fullest sense. It is through evangelisation that the 'Good News' becomes a 'Good Reality', since we evangelize not merely to announce the Good News but to put it into practice. Through the witness of our own life, the proclamation of the Word and effective action, we proclaim the 'Good News' and build the 'Kingdom of God'.
- The proclamation of the Word marks the presence of the Lord and his promise, transforming action marks the building of the Kingdom of God. In this whole process of proclaiming and building the Kingdom, Faith and Justice are united. Without the proclamation of the Lord and his promise the whole process loses its sense of direction, and without transforming action there is no process at all.

3.3. The real integration between service of Faith and promotion of Justice.

- It is clearly obvious there is a mutual relationship between Faith and Justice in the construction of the Kingdom of God. This mutual relationship, the fundamental option of GC 32, is not a mere

juxtaposition of the two dimensions, nor a theoretical link between them, nor an accomodation on the level of ideas, but something that becomes real when itself confronted by reality: by a world ruled through injustice and unbelief, which affect the Jesuit not only as a 'missionary' (that is, in his activity toward others) but also as a 'christian' (that is, in his own christian life). This relationship between Faith and Justice, internalized through confrontation with the injustice and unbelief of the world, is the model proposed by GC 32. This is what we should aim at and, together to our planning, it constitutes our conversion. It is important to examine this model carefully and compare it with the others described above.

3.4. Service of Faith and Promotion of Justice according to this model

- With regard to Faith GC 32 said: we must examine our efforts to reach out to non-believers (4.52). The Faith we serve is not something already self-evident, something possessed spontaneously or by tradition; it is rather a 'victory over the world' and our service of it has to keep in mind that the preaching of Christianity causes scandal and shock. We cannot live in isolation and out of touch with unbelief (4.35), for this would prevent unbelief truly challenging us. Finally GC 32 asks Jesuits to prepare themselves to be witnesses of the Gospel in difficult situations where our hope will be tested by unbelief. (4.35)
- With respect to Justice GC 32 says: the mission of the Society today is carried out in a world dominated by 'many grave injustices' (2.6), divided by injustice that is not only personal but institutionalized (4.6), and in which the very meaning of man, his future and his destiny, is at stake (4.21). Our mission is therefore carried out in a world of injustices and against it, since 'it is now within human power to make the world more just but we do not really want to' (4.27). This confrontation with the world through the promotion of Justice can also be found within the Society: in the inertia of each Jesuit who ignores injustice (4.35) or considers its promotion merely an ideal. Therefore 'any effort to promote justice will cost us something' (4.46) and this is the reason why GC 32 encourages us to face up to the hardships and risks we may encounter in God's service (4.67).
- And so the fundamental option of our mission, an option we have formulated positively, has to be understood from injustice and unbelief, from suffering and its consequences. Only in this way is it a real option. Otherwise it would be a 'new ideological option' which could conceal our lack of hope. This is the dialectic model according to which we must understand the inseparability between service of Faith and promotion of Justice which GC 32 proposes as the 'basic option' for us all.

- *As our basic option becomes real in the measure it is understood from injustice, unbelief and their consequences, we begin to have a criterion to judge the validity of what we do, either as individuals or collectively. We are fulfilling our mission if we are living it in the world of unbelief and injustice, and against that world. This is the real test of our option, rather than theoretical discussions or debates about the meaning of serving Faith and promoting Justice.*
- *We know clearly what we have to fight against and we know ideally what we must fight for. Fighting against unbelief and injustice is how we fulfill our mission.*
- *This is how we must live and understand, according to GC 32, the inseparability between service of Faith and promotion of Justice. This is the desired goal of our personal conversion along with the planning of our works and activities. A personal and community effort to plan what we are doing should be accompanied by a joint effort to unify our outlook around this 'basic option', thus understood.*

3 : IDEAL - OBJECTIVE

The third and last document of the planning process tries to draw a picture of a Society of Jesus in Bolivia in 1980. Once again here we will merely give a few indications about the document itself.

(1) IDEAL - OBJECTIVE OF OUR WORKS

This is a detailed though flexible plan of apostolic works and activities the Society of Jesus in Bolivia would like to adopte within a specific time limit (namely 1988, 10 years from the beginning of the planning process, 20 from the Survey and 30 from the foundation of the VP). It has been drawn up in accordance with the General Guidelines and Specific Policies, and is called Ideal - Objective because it is an 'objective' or goal we hope to reach through a rational and planned use of our resources.

A. Fields of actions

In determining activities we have not used the old classification by sectors (pastoral, social, educational, communication) so as to emphasise the integrated nature of our work and, especially, the need to integrate service of Faith and promotion of Justice. At the same time, we have tried to give maximum coherence to our option for the poor. The types of works are classified in the following fields:

- 1) Rural: *that geographical, social and cultural area inhabited by*

'campesinos'. This area is especially important for the cultural problems of the Aymara, Quecha, Guarani, etc...

2) Urban: here there are two sub-areas:

General urban: City centers where works to help the poor can be undertaken.

Urban Popular: outlying areas and poor districts, working-class neighborhoods where direct activities for and with the poor can be undertaken.

3) Specialised services: certain works and actions which require a degree of specialisation and can benefit various groupings.

B. Types of works and actions

This central part of the Ideal-Objective describes the key elements of those works and activities considered more in line with:

- the needs identified in the General Guidelines,
- the actions and policies determined by the Society of Jesus in Bolivia,
- our capability and experiences.

These works and actions are described in detail. At the beginning of each, specific objectives are indicated which constitute a halfway house between the ideals of the G.G. and concrete goals to be realised within a certain time limit. Other characteristics are then detailed.

(2) IDEAL-OBJECTIVE OF OUR COMMUNITIES

A. Community project

General Guidelines are given which will enable each community to draw up its own project. These projects should be presented to Fr. VProvincial during 1981.

B. Composition, place and size of Jesuit communities in 1981

This is a sketch that will have to be completed as the Ideal-Objective for works is gradually put into practice. For our community life must be at the service of our mission.

(3) IDEAL-OBJECTIVE OF OUR TRAINING

It seemed better not to draw up an Ideal-Objective for the training of young

Jesuits until the two for our works and communities had been completed. We are of the opinion that our formation should be determined most of all by the type of apostolic work we want to carry out.

For the same reason we believe that the Formation Commission should be composed not only by 'formatores' but also by representatives of each of the areas of our apostolate.

(4) GENERAL CRITERIA IN COMPOSING THE IDEAL-OBJECTIVE

A. Integration

In the Ideal-Objective we have tried to integrate, or at least co-ordinate, different works either because they are addressed to the same groups or because they carry out a similar type of work with different groups.

In some cases there is explicit mention of the co-ordination or integration required: in others this is obvious because of almost identical objectives. In both cases the Ideal-Objective aims to be an organic whole which will produce a multiplier effect in our work by eliminating repetition and allowing some specialisation.

B. Other criteria

In listing works, objectives, etc. there is no order of priority and, therefore, the fact that one is placed before another does not mean it is more important.

Many in the VP have noted the lack of a strictly charitable type of work. We feel this should not be a category with its own identity in the Ideal-Objective, but that in planning many works attention should be paid to guidelines for charitable assistance. For example, in planning Centers for Intensive Pastoral Action, attention must be paid to immediate needs such as a dispensary, care for mothers of families, for the handicapped etc.

In some works Jesuits will have to continue playing a subsidiary role until such time as other people can take over their functions. Our missionary vocation should always be pushing us further ahead of our works, so that we can undertake new ventures in the task of evangelising our brothers.

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 METHODOLOGY

The following article is taken from the collection of papers published by the Jesuit Conference of the USA under the title The Context of Our Ministries: Working Papers. Its author is Fr. Thomas E. CLARKE, for many years theology professor at Woodstock College and at present a research associate of the Woodstock Theological Centre in Washington, D.C. The method he describes was used during a year of work by a special study team of 6 Jesuits commissioned by the Jesuit Conference to prepare material for a *description and assessment of the social, religious and cultural context of our U.S. mission in the light of the Gospel, Catholic teaching and the ideals of the Society of Jesus*.

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I : INTRODUCTION

"The method is the message". That is how our Jesuit General, Pedro Arrupe, spoke of *Our Mission Today*, the key document of GC 32 ("The Practical Dispositions of Decree 4 of the 32nd General Congregation" SJ Documentation, Nº 33, May 6, 1976). Implementation of the Congregation's call to the service of faith and promotion of justice will be successful, he suggested, to the degree that the proposed method of deepening awareness and apostolic discernment is followed.

The present project on the context of ministry has from the beginning tried to be sensitive to the importance of method and process. Method is not magic. No single method of contextualizing our apostolic choices is suitable for all circumstances. Theoretical considerations on method need to be drawn from and tested by actual experience. Still, that experience, together with insights drawn from our Christian and Jesuit heritage, has yielded certain elements necessary or very useful for the description, analysis and evaluation of the context of our ministries. Hence, this background paper wishes to comment on some of the main elements of a method called for by GC 32 or commended by subsequent efforts to implement it.

The 'Practical Dispositions' of Decree 4, picking up a few hints from the Apostolic Letter, Octogesima Adveniens, of Paul VI, directed that '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' (n. 73). One of the notable efforts to flesh out these indications took

place in August 1979, when the major superiors of religious men and women in the U.S.A. celebrated Convergence. The process there employed for over a thousand participants had been developed with the help of the staff of the Center of Concern. The Convergence experience developed GC 32's model by explicitating the contribution to be made by social analysis. In the past few years the Convergence model, and such ventures as the JSEA Colloquium on the Ministry of Teaching, have witnessed to the continuing search for appropriate methods of arriving at apostolic choices with sensitivity to Christian values, Church social teachings, and the reality of the U.S.A. and world scene. Related to such initiatives have been the development within circles of Ignatian spirituality of methods for individual and communal discernment.

In the context of the present project, the following remarks attempt to build on such efforts, by describing some of the basic features to be sought in whatever particular method may be used by Jesuits and their associates in the course of deepening awareness and making discerning apostolic choices.

II : ELEMENTS OF METHOD

There is question, according to GC 32, of a method of "deepening awareness and apostolic discernment". The phrase points to a kind of subject/object relationship. Eventually choices are to be made, but what is crucial is the mindset or disposition of the choosing subject (individual and corporate). Such language is clearly evocative of the dynamic of the Spiritual Exercises, which are aimed at "election", but which proceed from the deep Ignatian conviction that the exercitant needs to be both enlightened and free if the choice is to be holy. The present approach to method, then, extends the basic methodology of the Spiritual Exercises, to the corporate choices we are called to make in societal contexts.

A. Experience

Experience is named by Octogesima Adveniens, by GC 32, and by most subsequent models as a basic ingredient of the method to be employed. The category of experience is, of course, a major one in recent theology, spirituality, and other disciplines. Only a few observations can be made here with respect to its inclusion in any method of contextualizing our awareness and apostolic discernment.

There is question not only of the empirical but of the experiential, that is, not only of gathering data for analysis but of retrieving lived encounters with other persons, with the world, with God himself. The experience drawn upon is both individual and corporate. It is many-faceted, touching every dimension of our human involvement in the world. But at its core it is faith-experience, encounter with God manifesting Himself and His call to us in all dimensions of our life and particularly, for our purposes here, in

"signs of the times".

There are many advantages in making such experience an explicit ingredient of any chosen method. Negatively, this step helps us to ward off the dangers of rationalism and idealism; bloodless abstractions, congealed categories, are not the appropriate starting point. Positively, drawing on experience as "personal salvation history" keeps us in touch with the continuity of God's call. And when experience is shared through story by companions in a common and difficult enterprise, it energizes and creates bonds of solidarity capable of surmounting inevitable conflicts on the level of ideas and practical change.

It is important, then, that concrete approaches to contextualizing our ministries should provide space and time for each one in solitude, and for groups together, to recapture and share experience on whatever aspect of life is under discussion. Many have helped by combining such reminiscence with the prayerful reading of Scripture, which refracts the primordial experience of the Christian community, and which has a unique power to energize us as it draws our limited experience into the broad history of salvation centered in Jesus Christ. Another powerful and fruitful way of drawing on experience is that of "insertion" into various kinds of milieus, where the plight of the poor, or the oppressive character of certain economic and political structures, or concrete strategies for societal change, can be experienced and made the material for individual and communal analysis and reflection. "Horizons for Justice", "Companions for Justice" and other programs have provided U.S. Jesuits with such opportunities. Such deliberately chosen and structured experiences, as well as the broader range of spontaneous experience, provide both matter and motivation for the rest of the process.

B. Social Analysis

The term and the exercise probably least familiar to most Jesuits is social analysis. Thus it is most in need of both understanding and practice, if it is to be skillfully employed in our ministerial choices. Fortunately, there are available some more detailed descriptions of its character and use than it is possible to offer here. Two observations, however, may be helpful:

1. Social analysis is not the prerogative of an elite. If a participatory, democratic way of life is to be a possibility, it requires a basic confidence and skill on the part of ordinary people in making critical and informed judgments regarding the social contexts of their lives. To say this is not to deny the importance of specialized knowledge, or the difficulty which most of us have in being reasonably well informed on scores of major and complex issues, and in deciding just what sources of information and analytical helps to critical judgement deserve our trust. Still, it is important that Jesuits, who tend on the whole to honor specialized knowledge, should regard specialists in the various disciplines

as helpful mentors, not as substitutes. Among our own membership and elsewhere, we can find competent interpreters of the social scene who can help us develop our ability to appraise critically the various milieus which so strongly affect our life and ministry.

2. This caution against what might be called "expertism" is appropriately accompanied by the important observation that social analysis, while not in itself an exercise of theological reflection, always takes place on the basis of certain value assumptions, covert or conscious. The shape of questions, the areas of concern singled out for attention and study, the models chosen, the philosophical tools of analysis employed - such choices within social analysis are existentially dependent on the experience and commitment of the analyzer. Hence in dealing with social analysis, one's own or another's, it is important that ethical and philosophical assumptions underlying the analysis be sufficiently explicitated.

At the same time, however, social analysis has its own methodological exigencies and tools. And so, while social analysis is organically related to theological reflection, it cannot be reduced to this latter. Jesuits familiar with older discussions of Christian philosophy, Christian humanism and the like, will recognize here an important tension to be maintained, between Christian faith and the human instrumentalities by which that faith seeks to understand and shape secular reality.

The value and role of sound social analysis, therefore, in the total process here described, is partly in its helping us to move beyond personal experience of the milieu and to provide us with the empirical and analytical basis for the evaluative judgements and the pragmatic decisions which will represent our response of faith to the needs of our times. Without sound social analysis, our apostolic choices run the risk of being visionary, romantic or simply misguided and irrelevant. When such analysis is discerningly incorporated into the larger process, we are helped to exercise in a new fashion that good judgment and discerning choice which Ignatius prized so highly. The course of the present project, which has engaged the provincials and their staffs in some rudimentary exercises of social analysis, has yielded the promise that all of us, in varying degrees and for a variety of purposes, are able to develop this needed apostolic skill.

C. Theological Reflection

Theological reflection is a term which has recently come into widespread usage in several pastoral contexts. Father General has for more than a decade spoken of the importance of "the apostolate of theological reflection", which he sees not as the prerogative of a few professionals but as a reflective exercise of faith which should be taking place wherever Jesuits are in ministry. In its "Guidelines for Concerted Action," Decree 4 of GC 32 singled out, among four

especially important means of making our preaching of the Gospel more effective, *the need for research and theological reflection, carried on in a context which is both interdisciplinary and genuinely integrated with the culture in which it is done and with its traditions (n. 60).*

The nature of theological reflection and its place in both theology and ministry is in need of further study. But certain characteristics, as it is already being exercised, can be delineated. The aim of theological reflection may be described as the mediation of Christian vision, values and principles to the world of our experience objectivized through social analysis. It takes place in a kind of circular movement between past and present for the sake of the future, that is, between the heritage of primordial and perennial Christian experience and, on the other hand, the "signs of the times", through which God makes himself known in the events and experiences of today. To engage in theological reflection, then, is to theologize in a distinctive way, with a greater honoring of our contemporary experience as revelatory of God's designs, with care to let our personal experience of the world be tested and confirmed by the exercise of social analysis, and with the conviction that the truths of divine revelation are manifested to us so that we may contemplatively act to develop and liberate a world struggling with sin. It is also, as in the case of social analysis, to accent the responsibility of each Christian with help from professional theologians and guidance from the bishops, to speak the discerning word of faith in concrete historical situations.

While the function and advantages of theological reflection as a key component of method are richer and more complex than can be here described, one central function is to make possible a Christian evaluation of the context of our ministry. What - in the world of our experience, the world made more accessible to us through social analysis - is in harmony with the Gospel and what is not? What is to be designated as "societal sin" or as "societal grace"? While Christian values are already at work, as we have indicated, in the stages of experience and social analysis, it is the task of theological reflection to formalize and explicitate this critical task of Christian faith. It is no easy task. The rise of a new fundamentalism in our country, seeking in the Scriptures facile and direct solutions to very complicated questions on which honest and committed persons can differ, warn us against any simple deductive process. The opposite danger would be to let skepticism and the relativizing of Christian faith and values paralyze our recourse to our roots.

What needs to be accented, perhaps, is that, while sound methods of interpretation of hermeneutics are extremely important, the recourse to Scripture and tradition for light on the present has its principal fruit in what happens to us in the process, morally and spiritually as well as intellectually. However distant and different the cultures in which the Scriptures were composed, God's inspired word retains a unique power both to comfort and to challenge. As will be indicated below, self-criticism and criticism of the social context

are, in this method, inextricably linked.

But theological reflection needs to be creative as well as critical. Our recourse to distinctively Christian sources provides light and energy not only for a moral and religious appraisal of the present and of ourselves in the present but also for the discovery of alternative futures. Here the Scriptures are particularly powerful in their ability to spark the Christian imagination to new dreams for our humanity. And the Church's social teaching, developed and refined for centuries (especially in the last ninety years) offers sound guidance for our moving from such dreams into realistic projects of salutary social change.

D. Decision and Action

The fourth principal component of the method we are presenting here is designated in Decree 4 by the phrase "decision and action" (n.73). Eventually ministerial choices need to be made and implemented. The cycle which began with our personal experience of the world must return to fresh experience, freely chosen in the light of the other stages of the method. It is especially at this point that it becomes pertinent to highlight the distinctive contributions to method that the Ignatian spiritual tradition can make. At least four aspects of this tradition are worth mentioning.

1. GC 32 teaches us to conceive our apostolic choices as instances of the Christian discernment of spirits. The pedagogy of the Exercises is a pedagogy of discernment (n. 57). Because of the recent revival of this spirituality of discernment, individual and communal, and the availability of such apt vehicles as directed retreats and particular methods for communal discerning choices, Jesuits and their associates now have access to rich resources for developing the ability to make societal choices under the influence of the Spirit, and therefore in fidelity to God's call. In whatever form, then, every serious approach to apostolic choice should provide appropriate exercises in which individuals and groups can prayerfully listen to the movement of grace as they draw together the different strands of the total process.
2. It is clear that the crucial element in any discerning process is the quality of inner freedom or indifference, also highlighted by GC 32. *The Exercises also help form Christians who, having personally experienced God as Savior, are able to stand back from the spurious absolutes of competing ideologies, and because of this detachment can play a constructive part in the reform of social and cultural structures (n. 58).* There is question, then, of extending our traditional understanding and practice of indifference to corporate decisions within the structures of society and culture. For this we need to be aware, with help from the behavioral sciences, of the interpenetration of consciousness and structures, and incorporate this

awareness into the theory and practice of our spirituality. As participants in the sinful/graced world of our experience we stand within, not outside of, that which darkens and enslaves our world. A key characteristic of method, then, is to insist on attending, with a certain simultaneity, to the reciprocal interaction of structures and consciousness from the standpoint of sin and grace. In this sense the method is not one of detachment or objectivity, but of inclusion. Such considerations make it clear that the total process is one involving the conversion of individuals and communities together with the structures and institutions which they create or perpetuate or change. *The aim is to insure a change in our habitual patterns of thought, a conversion of heart as well as of spirit. The result will be effective apostolic decisions. (n.73).* In whatever form, then, any serious method of situating our ministries in the total context needs to provide appropriate "exercises" for the individual and communal growth of "indifference," freedom from "cultural addiction."

3. The examination of conscience or, as many call it today, of consciousness, offers an Ignatian vehicle most apt for the method here being described. Besides offering the general and particular examinations of conscience, Ignatius directs the exercitant to be reflective as he meditates and completes. "I will reflect on myself", is a key directive of the Ignatian retreat which may be fruitfully extended to the method we are describing here. GC 32 would have us link objective and subjective dimensions in reflecting on our societal milieus: *Where do we live ? Where do we work ? How ? With whom ? What really is our involvement, dependence on, or commitment to, ideologies and power centers ? Is it only to the converted that we know how to preach Jesus Christ ? (n. 74)* It is clear that such questions, though informed with the empirical data and analysis which inserts them into the social environment, are spiritually evaluative questions, linked with the burning questions every Jesuit has asked many times in making the Spiritual Exercises: "What have I done for Christ ? What am I doing for Christ ? What should I do for Christ ?"
4. There is the importance of the contemplative gaze upon our world, inspired perhaps by the prelude of the contemplation on the Incarnation and by the Ignatian ideal of being "contemplative in action". This habit of "a long loving look at the real," without the need of immediate recourse to practical conclusions or resolutions, represents one of the most powerful influences of the Spiritual Exercises. When incorporated into our apostolic reflection, it can add depth and clarity, develop inner tranquility, guard against that activism which leads to "burnout", and forge more intimate bonds of faith and love among those who are struggling together to create a better world.

III : CONCLUSION

A final observation regarding the kind of method here described is that the various components need to be seen as organically related, not as totally discrete steps in a linear process. Because there is question of persons exercising integral human action in society, each of the principal elements is affected by all the others. As there is no such thing as a value-free social analysis, neither do we experience reality without being influenced by both value assumptions and previously accepted analysis. Similarly, we both read the Scriptures with eyes and hearts conditioned by our social settings, and also relate to those settings with attitudes shaped by our assimilation of Scripture.

Jesuits have no special charism enabling them to escape from complexity and conflict in the common task of uniting experience, analysis, reflection and decision. What they do have is a tradition of spiritual exercises - consciously chosen and deliberately practiced varieties of human behavior shaped by faith - which have proven their value in facilitating the enlightenment and freedom without which holy choices are not made. The opportunity and challenge of the present moment is to extend this tradition to our corporate dealing with the complex structures and institutions of our society, the context of our ministry.

In summary, then, attention to the importance of method, the choice of particular methods which embody and facilitate the realization of our faith/justice aspirations, and learning from actual practice just what particular approaches to method will be most fruitful, are all imperatives of the process of situating our ministries and our choices of ministry within their social context. Jesuits have a long history of adapting both message and method to contingent contexts. But there are transcendentals of method, so to speak - adaptation is one of them, in fact - and we have here tried to call attention to some of these. They have begun to be tested by experience and will undoubtedly be further tested. But, even at the present stage, they may help to guide our deliberate choices of social exercises which dispose us for important ministerial choices.

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PRACTICAL METHODOLOGY

The following article is also taken from the collection published by the US Jesuit Conference. Its author is Fr. Edmundo RODRIGUEZ who has worked for many years mainly with the Hispanic community in El Paso and San Antonio. He was a founder of PADRES (The national organisation of Hispanic priests) and also of COPS (Communities Organized for Public Safety). He is at present assistant for international and pastoral apostolates to the New Orleans Provincial.

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I : INTRODUCTION

Vatican II spoke of the need for Christians to become familiar with the national and religious traditions of the people among whom they live and to uncover with gladness and respect those seeds of the World which lie hidden among them. It also said they must look to a profound transformation of society so that the riches which God has distributed among the nations may once more come under the dominion of God the Savior (Ad Gentes Divinitus, n. 11).

The following methodology for getting in touch with the context of our ministries is offered here for use at the local community level. It proposes three major steps: first, gathering the experiential data which reveal important aspects of the social organization of our surroundings; second, analysing the data in a way which may yield both the "seeds of the Word" to be uncovered and the contradictions which may prevent the Gospel from taking root; third, choosing ways in which our ministry may uncover the seeds and uproot the obstacles which we uncover, in order that society may be transformed.

This method may be employed by one person or by a group of persons. For full community discernment, of course, it is desirable that the conclusions emerge from the perceptions and judgments of several persons.

II : SOME PRELIMINARIES

When a group of persons begin to use this method, they should spend some time telling each other's stories. This is important to remind them that the exercise of getting in touch with the context of ministries is not about things but about persons. It is about persons like themselves, persons with a history, with feelings,

with values and aspirations, persons who can laugh but also bleed, persons with a calling, persons who are also to live a reflective existence. As a preliminary exercise, the following questions may help a participant to tell his or her story:

1. What are my personal family roots ?
2. What are significant moments in my personal formation: exchanges, studies, events ?
3. Who are the most significant persons in my life ?
4. What are my frustrations, my aspirations, my hopes ?
5. What do I consider my most characteristic personal trait ?
6. What is the genesis of my vocation ?

These preliminary questions are intended to "prime the pump" and to enable the group members to share important information about themselves. A sense of the identity amid complexity of each of the group members as a person will do much to help the participants understand the instrument they are using which seeks to identify central causes amid societal complexity.

III : STEP ONE : GATHERING THE DATA

(Experience)

Every person has innumerable perceptions and impressions of the situation in which he or she lives and works. These perceptions are often not organized in any way. Pattern are discovered by organizing the data according to general categories. What follows are some questions to help us gather the data about our local context of ministries.

A. Geographic Data

1. Define your theoretical as well as your actual service area. (This may range from a parish to a city or even a larger region. Some questions will not apply to larger service areas.)
2. Where are the "community resources" (persons, institutions, places, buildings) in your actual service area ?
3. Where are the "community trouble spots" in your actual service area ?
4. Are there physical aspects of the area which have a dehumanizing effect on the people of the area ?
5. Are there physical aspects of the area which enhance the humanity of the people in the area ?

B. Demographic Data

1. What is the population of your actual service area ?
2. What is the growth rate (increase/decline) of your area ?
3. What is the racial and ethnic character of your area ?

C. Family Organization Data

1. Describe the types of families or households in your actual service area.
2. What patterns of extended family life do you find among those families ?
3. What are the strengths manifested in these families ?
4. What are the problems experienced by these families ?
5. Is "family" valued by the institutions which serve these families and in what way ?

D. Economic Data

1. What is the general economic profile of your service area ?
2. What are the underpinnings of the economy in your area ?
3. What are the problems which face the economic institutions in your service area ?
4. What are the problems which stem from the economic institutions in your area ?
5. What are the effects of these problems ?
6. How are the basic economic factors of your service area related to the international economy ?

E. Political Data

1. What is the political profile of your service area ?
2. What is the nature of the political leadership of your area ?
3. What is the nature of the informal leadership of your area ?
4. What is the effect of non-political groups on the politics of your area, e.g., churches, unions, professional associations ?
5. What is the strength or weakness of the governmental institutions which serve your area, e.g., the courts, city council, public hospitals, justice-system institutions ?

F. Educational Data

1. How would you describe the product (graduates) of the schools in your areas in regard to academic skills, social attitudes and values absorbed ?
2. How do the schools and the community, especially the parents, relate in your service area ?
3. Do the schools have written or unwritten policies or practices which have the effect of excluding any segment of the population ?

4. What are the problems experienced by the schools ?
5. Are there any institutions of higher learning in your service area; and, if so, how would you describe their graduates in regard to academic skills, social attitudes and values ?
6. Do the institutions of higher learning have an impact on the life of the wider community ? What kind ?
7. Describe the opportunities for adult education in your area.

G. Ecclesial Data

1. What is the religious profile of your area ?
2. What is the strength or weakness of the ecumenical movement in your area ?
3. Describe the religious loyalty of the people of the area and the causes of such loyalty, e.g., cultural identity or upbeat liturgies.
4. Describe the disaffection of people in your area toward their churches and the causes of such disaffection, e.g., too liberal or too conservative clergy.
5. Are there other religious but non-institutional factors which affect your area, e.g., spiritism ?

H. Social and Cultural Data

1. What cultural strengths do you find in the population you serve?
2. What are some of the cultural strains (customs, inherited attitudes, social patterns) which you find objectionable in the population you serve ?
3. What is the "psychological temper", the prevailing mood, of your area ?
4. What are the prevalent positive attitudes among the people in your area toward members of other races or ethnic groups ?
5. What are the prevalent negative attitudes among the people in your area toward members of other races or ethnic groups ?
6. Is there any perceptible "class structure" among the people in your actual service area ?

IV : STEP TWO : ANALYSIS AND SYNTHESIS

(Social Analysis/Theological Reflection)

The parts of this section presuppose that causes are more important to deal with than effects, that priorities must be determined among causes of both strengths and weaknesses, and that, ultimately, situations must be judged according to Christian norms with a view to transforming them through Christian ministry and action.

A. Analyzing the Data

1. Examine the data as you have organized it and mark out any elements which seem more causal than others, both as sources of strengths and as sources of problems.
2. Look for causal elements which may crop up in two or three or more categories. Watch for similarity of ideas rather than similarity of wording. List these.
3. Examine the list once again and see if you can develop a priority list distinguishing between "causes" and "casual causes".

B. Synthesizing the Data

1. Write a complex statement of what you consider to be the principal causes of the problems faced by the community in your area. E.g., "The 'consumers' of this community are powerless in the face of highly organized and bureaucratically impenetrable institutions which determine the economy, the political participation, the type of education, and even the religious services rendered to them. The 'consumers' have taken on the attitudes of 'victims' and react passively and hopelessly to the situation".
2. Write a complex statement of what you consider to be the principal strengths of the community in your area. E.g., "People in this area are very concerned about the children and the young people and will unite in any effort which is seen as beneficial to them. There is a basic religious faith which can be tapped as a source of perseverance and strength in dealing with long-term, difficult problems."

C. Judging the Situation

1. Ask what Christian values and principles one should use in judging the situation revealed by synthesizing the data (as described above). E.g., "Christ affirms the dignity of every person, has given to each the promise of a more abundant life, says that authority and power should be used for service and not to dominate, and calls upon us all to be responsible stewards of the gifts and powers entrusted to us." One might also look for instances in the Gospels wherein Jesus deals with related events or questions. E.g., Jesus instructs the disciples on the manner of governing by instructing them to be humble servants and not oppressors (Mark 10, 43-45).
2. Formulate a judgment about the situation described using the Christian principles. E.g., "We judge the situation to be evil inasmuch as the dignity of persons is being offended by rendering them powerless, and inasmuch as the responsible stewardship to which every individual and group is called goes unrecognized, and inasmuch as neither schools nor churches are developing a critical consciousness about such stewardship."

V : STEP THREE: MINISTERING TO THE SITUATION

(Action)

The Church has always developed new ministerial strategies for dealing with problematic areas in society. At times it has gathered in communities apart and created small societies with different, more loving, relationships. At times it has sought to teach the principles which Christ taught. At times it has confronted evil rulers and oppressive masters. The strategies have been different to conform with both the best insights into the problems at the time and with the strengths which the Christian community can bring to bear on the problems. Thus, we too must move from insight and judgement to strategy and action.

A. Brainstorming Responses

1. Looking at the judgment statement (formulated above), list the many possible ways in which you might be able to respond to the situation ministerially, trying not to exclude any reasonable options.
2. Examine the list of options and remove any which do not seem to have any probability of success or are clearly beyond the corporate capability of your group.

B. Choosing a Ministry Goal

1. Take each of the plausible options and write out at least three pro's and three con's for each.
2. Recall, then, the Ignatian principles which should govern our serious choices, e.g.,
 - a. to imagine the choices to be made;
 - b. to be ready to follow the course which is more for the glory and praise of God our Lord and the salvation of one's soul;
 - c. to be freed of any inordinate attachments;
 - d. to ask God to move one's will and to reveal to one's spirit what should be done;
 - e. to weigh carefully the advantages and disadvantages;
 - f. to offer the choice to God in prayer.
3. Choose an option, using consensus if possible, and always keeping in mind that the superior's will is a key element in the discernment process (see GC 32, Decree 11, n. 24.)

C. Developing a Strategy and a Timeline for Implementation

1. State the goal as the final step in a series of steps.
2. Determine the steps which must be taken by working backwards from the stated goal.
3. Assign a time frame to each step.

4. Flesh out for each step what resources will be needed, what preparation must be made and who will do what.
5. Examine the completed plan to insure that it does not violate the principles by which the judgment statement was made.

VI : CONCLUSION

The method outlined here is an effort to follow at the local level the plan which Decree 4 of GC 32 called "a constant interplay between experience, reflection, decision and action, in line with the Jesuit ideal of being 'contemplative in action'" (n. 73).

It parallels the general methodology described in Part Two of this Context Study, i.e., the cycle of experience, social analysis, theological reflection, and action. It is intended to be used fully or partially many different times. Situations and circumstances change, and we need continually to be about the process of evaluation and discernment which leads to apostolic decisions.

The fruit to be gained from this method is a deeper grasp of reality, a sharper picture of the context of our ministries at the local level. The questions suggested here are but guides to help the users formulate their own more specific questions. We penetrate reality through questions; and the sharper and better formulated the questions, the greater the probability of producing new and helpful insights into the situation. Hence, the questions offered in this method should be modified according to local need. The important thing is to take seriously the call and to engage confidently in the process.

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