

# Public Juridic Persons: Critical Issues For Formation

BY PETER NICHOLSON

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## Formation as a Critical Issue

LET me begin with a personal confession. I am a child of Vatican II. I began the study of theology whilst Vatican II was sitting. I pawed with my colleagues over the draft documents, published in the *Melbourne Advocate*, as they emerged. I remember meeting the youthful Hans Kung when he visited Australia in the earlier 1970s. I can't remember his lecture, but I can remember he pandered to my vanity by admiring the shirt I was wearing! I was inspired by the old man Joseph Cardijn when he visited in the late 1960s speaking of the apostolate of the lay person in the Church.

In the intervening decades I have devoted considerable energies, in various roles and in various organisations, to the formation, education in faith, of lay persons, that they might play their part and in accordance with their baptismal dignity in the mission of the Church. And now from a new direction, the establishment of Public Juridic Persons (PJPs), the issue of lay persons and responsibility in the Church, has surfaced.

In the latter part of the twentieth century, much thinking and writing was done in regard to lay persons within the Church. Yves Congar is perhaps the best known author. From a less speculative viewpoint, and more, from a pastoral perspective, Joseph Cardijn, founder of the Young Christian Workers (YCW) and associated jocist movements was equally influential.

These two with a number of others laid the basis for Vatican II's thinking on lay persons. Of course this was but a dimension of a renewed ecclesiology. But for a range of reasons, most of them not simply theological, the implementation of the vision was impeded. It is my strong belief that being given genuine responsibility and being formed as adult believers go hand in hand. In other words, the structural goes with the formative. You can't really have one without the other. Cardijn's famous catch cry was "formation through action" - very valid from the educational as well as the theological aspect.

We have gone some decades now with a serious mismatch between the espoused theory and the practice. Anyone who has served on various Church bodies knows what I am talking about. I have seen the pattern in many groups; people come in full of enthusiasm, then realise little by little, that the decision-making does not really lie with them, or that it is not really their show. In this situation something has to degenerate - be it commitment, good will or just the willingness to be involved.

The holding out of lay persons from decision-making and governance could in part be legitimated by Vatican II and other Church documents, by the strong emphasis on the fact that the proper vocation of the laity was in the world. This indeed was a very legitimate insight, emphasising that the Church does not exist for itself, but for society. But I think the claim has a darker side to it and that it can be used to hold the laity outside decision-making processes within the Church. It does impose a ceiling.

But here we are now discussing the establishment of PJPs. And in speaking about this, we cannot but be speaking about the role of lay persons in exercising the mission of the Church in an official mandated way. This is a significant move and I welcome it, whatever its genesis. In the main, lay persons have not exercised governance responsibilities within the Church. This has been exercised predominantly by clergy and religious. Now I don't want to totally collapse the issues of PJPs and the issues of lay persons in the Church into one, but there are significant touch points. There will be many models of PJPs, but surely a constant will be the involvement and thus formation of lay persons.



As we are aware, in Canon Law, the purpose of PJPs is to pursue the mission of the Church on behalf of the Church. There is a pragmatic genius something incredibly pragmatic within the Catholic tradition that can combine the high ground of the theological tradition with earthy pastoral application. When it does that, it is its best self. The reverse is also true: when it does not it is its worst self.

The fact is that the Church has not taken lay persons seriously or for that matter treated them as adults with what that implies today. Now we need them; we need their skills, their dedication, their insight, their labour. Otherwise we cannot carry forward the mission of the Church through established as well as emerging ministries. And we need that at all levels - not only in workers down the line, but in people exercising governance and management responsibilities. Formation is a critical issue in this whole historical movement.

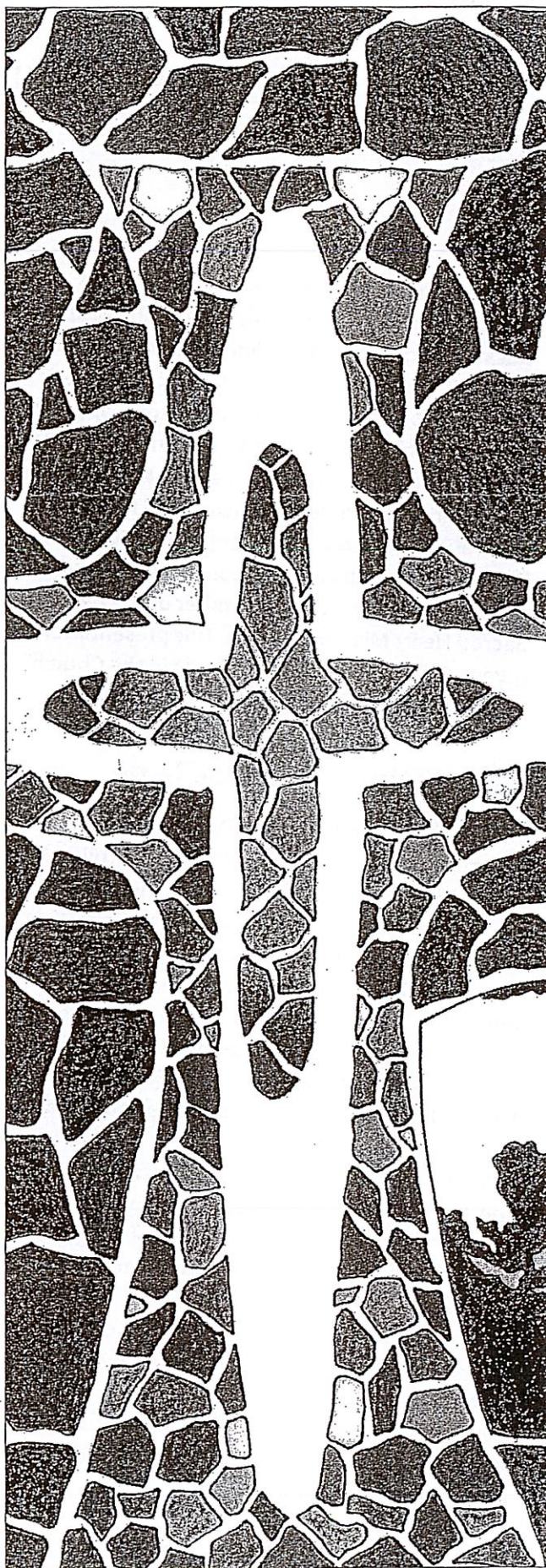
Religious and clergy have usually had the advantage of a lifetime of formation. Now realistically we all know that the processes were not infallible and that there were aspects that were de-forming. But for all of that, something worked. And much happened through socialisation and much formation occurred through the taken-for-granted implicit process of religious life or priesthood, as well as through the formal processes.

If the members of the governing body are charged with carrying the ethos of a mission-oriented organisation forward in contemporary society, this cannot but involve a sophisticated set of knowledge and skills; much more now than in earlier decades, for example, the Christian Brothers, my current employer, in the formation of Edmund Rice Education Australia, have been most assiduous in this.

What I want to do in the following pages is to reflect on this issue with you. I want to suggest to you an understanding of formation; then focus on some critical issues about this critical issue in the formation of PJPs.

## What is Formation?

FOR some years, I wondered whether there was a better term than formation. It is not in common parlance in the English-speaking world, although it is in the French. A quick Google search in French will take you into everyday workplace realities such as distance learning, professional development and training in every professional and occupational field you care to name. Understandably, this was the term that the lay apostolate movement of the mid-twentieth century, generated in Europe, took up. And it is the term traditionally used in regard to aspirants for religious life and priesthood. These days I am





more inclined to hold to it. I am aware that some mission-related organisations within the Church do not use the term at all. They may rather talk about mission services or mission effectiveness and indicative behaviours. There are different starting points and different orientations, but ultimately, the same foundational issues are there. I believe the approaches are complementary.

I am not going to suggest one tight definition of formation. But I have been attracted to the description used by John Paul II some 20 years ago following the Synod on the Laity: "The fundamental objective of the formation of the lay faithful is an ever-clearer discovery of one's vocation and the ever-greater willingness to live as to fulfil one's mission".<sup>2</sup> This to me gets to the heart of it. Formation is about 'identity', that is, who you are, and 'mission', what you are called to what is your mission in life. It is, then, a radical personal process. It is about integrated personal growth in all its dimensions - human, spiritual, intellectual. It is not simply about acquiring an overlay of ecclesiastical knowledge or for that matter modifying one's behaviour so that it expresses values that are in harmony with the values of X facility. It is about the development of a person, and that implies quite a package.

**Human:** Formation is about the development and integration of qualities such as the ability to relate to others, the ability to love, to be free, to act justly, to act according to one's conscience. The human is the foundation and basis of the other dimensions of formation. PJPs need to be peopled firstly by integrated human beings. If not, the mission of the Church which they pursue will not serve but will do damage - not an unknown happening in our history.

**Spiritual:** Formation is clearly about spiritual development and facilitating the person's encounter with God. The human person is open to and yearns for the transcendent. Formation is about sensitising persons to that dimension, enabling them to explore it, and initiating them into a tradition of understanding and practice, so that they operate from this heart. In recent years spirituality has been contrasted by many with religion, spirituality being more acceptable in the post-modern era than institutional religion. Although those working in the field need to be very cognisant of this cultural characteristic of our time, Christian formation and per force the formation of those governing or pursuing the mandated mission of the Church locates itself within the rich spiritual tradition of the Catholic Church. Yes, too often a well-kept secret. We walk in the footsteps of the giants of our tradition - Augustine, Teresa of Avila, Ignatius - to mention a few. Our spiritual tradition opens us also to the insights of other spiritual and religious traditions, but we know our home

and the ground on which we stand. Those who govern and lead the mission in the Church need to operate from an internalised spirituality.

**Intellectual:** Formation needs incorporate intellectual development. While Christian faith is not solely about intellectual assent, knowledge and the exploration of the content of faith is a necessary dimension, since the intellect is part and parcel of the human personality. Such knowledge enables people to put a language around the deepest of mysteries, to engage in dialogue around those mysteries, and to make decisions in their light. It is these disciplines which enable people to articulate a mission in the complexity of the post-modern world. This content includes the doctrinal, the moral and the social justice tradition of the Church. It is not unknown at this time in our history to have board members, executives, and managers who are articulate in all aspects of the operation bar the mission and the meaning system on which it is based. Those discussions are left for the sisters, the brothers or the bishop.

## How Does Formation Happen?

*CHRISTIFIDELES Laici*, which followed the Synod of the Laity in 1988, made the claim that formation happens in life. God is the first great teacher and God's teaching happens primarily in the various places of life: in the intimacy of relationships, in family, in community, in the workplace, in the experience of solidarity with others, in working for justice. That to me is a key insight.

But of course formation also happens in formal educational settings. The acquisition of knowledge together with the critical skills which enable the person to bring that knowledge into play with experience is a key contribution of structured programmes. However, any formation activity or programme needs to be seen alongside and in the context of the particular host community, group or ministry. Formation is also about how a Church community lives, interacts with its context, sets its priorities and makes its decisions. Yes, programmes have an important place, but it is the day-by-day life of a group which is most powerfully formative. At their best, intentional programmes enable people to learn from life.

If the lifestyle and structures of the group run counter to the thrust of the programme, the programme is likely to be largely ineffective. In fact, a programme may simply serve to alienate a person if there is a significant dissonance between the lived reality of the organisation and the values it espouses. This does not devalue the place of the intentional formation endeavour, with its



professional personnel and expertise. Rather it places formation at the core of the organisation or group and assigns responsibility for it to the whole collective. Leaders and managers are the key formators, whether they own the role or not. Their interaction and decision-making cannot but be influential in regard to formation, be it positive or negative. At a minimum it says that formal programmes alone will accomplish little if a whole range of leadership, organisational and policy issues are not also considered. I shall come back to this point.

## Why is Formation Critical in the Creation of PJPs Today?

**Because formation is about shaping individuals and organisations.**

- Those involved in PJPs at the governance, management and operational levels carry varying responsibilities for maintaining the integrity of the mission.
- Individuals need preparation for and support in these various roles.
- The organisation needs constant formation in discerning, articulating and pursuing its mission.

**Because formation is about identity and mission, and is integral to the pursuit of mission.**

- The pursuit of mission presumes an intentional life of faith.
- Mission is the outgrowth of faith.
- Mission is pursued on behalf of a faith community.
- Mission is a response to the needs of the times in light of the faith tradition.

**Because in the post-modern environment, it is very easy to lose one's way.**

Postmodernism is characterised by:

- A loss of a unified way of seeing things and a consequent feeling of rootlessness.
- No real foundational principle.
- An intolerance of meta-narratives.
- Postmodernism impacts on individuals and institutions.

## Critical Aspects of the Critical Issue of Formation

**Can the formation delivery boy be trusted to truly deliver?**

Formation is often spoken of like the delivery boy - the delivery boy who is bearing the magic pill. Formal juris-

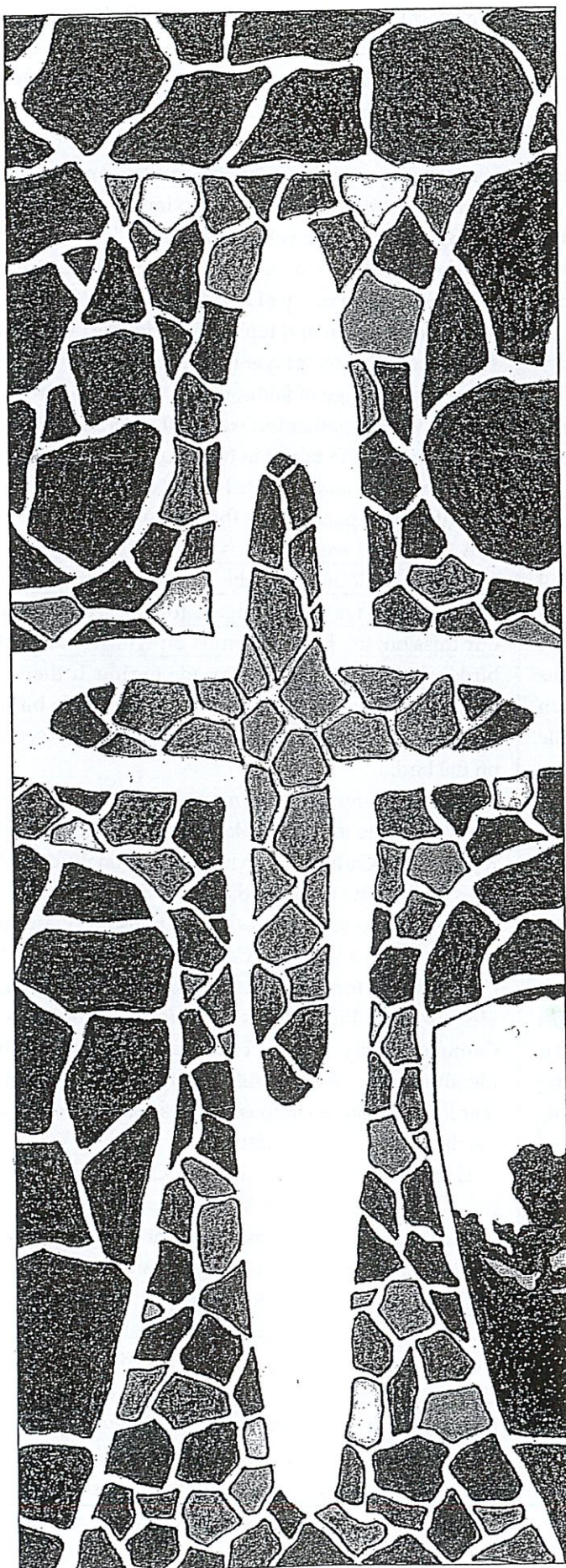
diction for mission in the main has been carried by dioceses, parishes, or religious congregations, and that means by bishops, priests, and religious superiors. Progressively, members of these groups are not available for the management of these ministries. Increasingly, it is difficult to find personnel even for governance functions. Thus, in the absence of 'vocations', there is a pragmatic need to involve lay persons. Clearly, it is the bishops, priests, and religious superiors who have the understanding and appreciation of the particular mission of a group, of the ethos of the ministries or groups of ministries in terms of the religious congregation - an appreciation of the charism. So what is needed is a process that will quickly take lay persons, particularly those who have particular professional skills and add to that a layer of knowledge, understanding and commitment to this reality we call the charism. The authoritative interpretation of the charism, of course, is hammered out by the members of the religious institute in that process known as chapters. Dioceses do it through a variety of other mechanisms - some formal but many informal. Formation then is the delivery boy who carries these goodies to the lay person promoted to such roles.

But unfortunately formation is about human growth. It involves human freedom and it only works with adults if it is a genuinely dialogic process. People take time to grow. Formation may raise as many questions as it provides answers. It will inevitably rock the boat. It is not a simple application of a schooling type or training model - decide upon the competencies required; work out what processes will achieve them; then put the people through the process and there we have a new foundation of lay persons upon which to build the pre-determined future. If people's formation is genuine, they will then want to be involved in foundational issues such as determining the mission, the characteristics of the PJP. I suggest that most Catholics who up until now have been involved in roles such as these have had a fair dose of the old Church submissiveness about them. That will be decreasingly so. Yes, formation is critical, but it may not lead in the directions that the parent organisations envisage. But if we are talking about the mission of the Church, surely it is not the Church's mission unless it proceeds from adult internalised faith.

## Will formation keep the charism going?

Let me come at a similar issue through another prism - that of charism, a reality which has been at the very core of discourse within religious congregations in recent decades. The question I ask is, "Will formation ensure that the charism lives on?" Is that the question we should be asking? The term 'charism' has become shorthand for





many things. Let me unpack it. In this interpretation I am indebted to the work of Sandra Schneiders.

In its most fundamental meaning a charism is a grace given for the sake not only of the recipient but also and primarily for the up-building of the Church. (New Testament - preaching, healing, administration). That grace or gift involves a personal experience of invisible power, but it needs to be discerned against the actual needs of the Church community. It is not given in isolation. It is for service of Church and world.

Schneiders goes on to propose that the notion of charism can be used analogously in a number of ways:

- i. religious life itself as a gift (*charism*) to the Church;
- ii. the different forms of religious life (hermits, monastic, mendicants, missionary);
- iii. the distinctive character of a particular order or congregation;
- iv. the recognition of one's individual vocation to religious life.

Schneiders cautions us not to lose sight of that most basic meaning of the term, that which is thoroughly grounded in scripture - a gift given for the up-building of the Church. Of the four analogous meanings, she says that the fourth is the most solid. In discourse in this area, the third is the most commonly used. We speak of "keeping the charism alive", of "forming people in the charism" etc. Schneiders urges caution. She says the real question is: not who founded us but who by the grace of God we have become.<sup>3</sup>

In other words, keep the founder and her gift in perspective. Do not try to replicate the past; the founding charism may give guidance, but most importantly answer the question: "what are the gifts of the group for service of Church and world, and correspondingly, what are the needs?" Formation for lay persons, then, should be very much about enabling them to recognise and develop their God-given gifts - for the up-building of the Church. Again they may well take us in different directions. Hasn't that been the story of religious congregations at their best anyway? I do fear at times that much of the talk around the charism is really talk about issues of generativity. We want more than a group of corporate citizens who are devoted to the sisters or brothers, and are faithfully but somewhat mindlessly implementing the wishes of the religious proprietors of various works. That is not mission.

Will formation keep the charism going? I believe that authentic formation will lead to people recognising their God-given gifts and putting them at the service of Church and world. That is what matters and the story and inspiration of the greats of our tradition, including



founders of religious congregations, will play a part in that. I do not know whether it will lead to the continuation of mission being exercised in the name of those figures. Nor do I take for granted that it should. History and the Holy Spirit will take care of that.

Sometimes I hear criticism of a lay person who has too easily transferred from one charism to another, the implicit accusation being that the person cannot be genuine in his or her attachment to the charism; that it is just a pragmatic attachment for employment sake. We need to remember that whilst formation will deal with the particular charism, be it that of Catherine or Mary or Marcellin, these are not substitutes for Jesus or simply more palatable figures than the radical and challenging Jesus. They are pointers to Jesus, lenses through which we might gaze at one aspect of him. Formation will keep that charism in that sense going.

I recently witnessed a very fine example of this in Bougainville. I was travelling with Brother Graeme Leach, a Christian Brother, who is the founder of a wonderful network of disability services across the country, and a very respected figure at all levels in that country. We were in Bougainville, which now operates as the autonomous region of Bougainville with its own assembly, its own ministers and its own public servants. Now Bougainville is predominantly Marist territory. As the many speeches from community leaders and politicians went on at this particular function, various speakers identified themselves as Marist old boys or Christian Brothers' old boys. When Graeme spoke, he very graciously said, "Oh there is a lot of the Marist in the Christian Brother and a lot of the Christian Brother in the Marist." Then he moved from the founders and spoke of the commitment of Jesus to the poor, of the priority of social justice and then of the part that they could all play in re-building that society, particularly in bringing about reconciliation and healing from the effects of civil war which they were still suffering. I found his words said so much to me about charism, about Gospel, about leadership, and about mission as applied to the particular circumstances of that society.

### How Much of the Church Stuff Do We Have to Do? The Ecclesial Dimension - the trickiest of them all

Look at the rituals - fascinating. What are they? Where do they happen? Who does them? Perhaps you have heard some of these statements?

- "A few years ago, we used to have Mass every few months for the staff. Now we have it once a year when the Archbishop visits."
- "Board Meetings used to begin with a prayer but

the new chair is not really at home with it, so out of respect for him we just get on with the business."

- "The last Director of Mission was a religious - and she always led the prayer. Now there is no one confident enough to do it."
- "There used to be a chapel but we turned it into a multi-purpose community centre. And anyway I don't think a workplace has a right to impose its views on employees. It's the values that matter."
- "There used to be a crucifix on the wall in the foyer, but because so many of our clients are not Christian we took it down and replaced it with the tree of life."
- "We used to have prayer on Wednesdays, but our staff are from a range of faiths, in fact mostly no formal faith. We still gather but we call it reflection rather than prayer. We take it in turns to lead. Last week it was my turn and because it was November, I read this really funny poem about the Melbourne Cup."

A term used sometimes is *mission drift* and I think it is very real. Sometimes the Church is presented like the nuisance we need to have for the legitimization of our mission; the hippopotamus on which that the little bird, which is our ministry, needs to ride. If there is no hippopotamus, you can't have that sweet little bird. But the prevailing thought is that it's best to just concentrate on the bird.

In this post-modern environment institutional religion is problematic and that takes on a particular shape in regard to the Catholic Church with its strongly, centralised hierarchical structure. But the fact is that formation, of its nature, is an ecclesial process (I did not say ecclesiastical), and it takes on a specific ecclesial nature in the context of a PJP. It is about forming individuals; it is about forming the identity of the PJP and it is about forming contemporary Catholic identity. J. Bryan Hehir says: "A person without identity is a threat to himself or herself. But an institution that loses its moral compass and its sense of identity is a much larger threat to society."<sup>4</sup>

There is a sense in which the Church is made and remade from ground up in each new social setting and in each new age. To me that incident I just related about Brother Graeme Leach is a perfect example of the Church being remade in that society, a formative moment. There is a core to formation and there are a number of elements which constitute it. They are inherent to the nature of the Church. Consequently, I term them the four pillars of formation. Let me hasten to add that not every programme or initiative for every group will address them equally or at the same time. Methodologically, it does not mean that one approaches them woodenly. What I am saying is that



individuals or groups which claim to exercise ministry in the Catholic context need to somewhere, somehow, address these.

## Four Pillars

**Skills of interiority:** Assisting people to explore, develop and ritualise authentic interiority will be a key focus for formation within the groups and ministries comprising a PJP. It needs to be done in a way that equips people, at their own level, to be critical of the culture, taking up what is genuinely human and of the Gospel, rejecting what is not. All of this will be done in the light of an evolving Christian tradition, drawing on its riches, reshaping them as required. Strategies will include the following: retreats of various styles, dialogue and discussion, spiritual companionship, as well as facilitating occasions for reflective practice within the day-by-day life of the group or ministry. This is a dimension that needs to be explicitly named and planned for. If it is left to chance it will be subject to whim and the inevitable ambivalent forces of the culture and the timetable.

**Supports of community:** If adults today are to be assisted to dream alternative dreams and to live alternative lives, they need the close support of various forms of community wherein alternative stances can be explored, embraced and celebrated. Otherwise the dominant culture will win out simply because no other way has been given a fair chance. Any ecclesial community or group claiming the inspiration of Jesus of Nazareth is called to be an alternative centre of meaning where, within the context of a community on mission, Gospel values, that so often run counter to those of the everyday world, are expressed and celebrated. Community, then, is the second vital pillar of formation.

In general, strategies will aim at providing experiences of being together within an environment where the feeling of connectedness is experienced and celebrated, where the basis of connectedness can be explored in trust, and where the underpinning narrative of the Gospel and a founding charism can be named. Such environments are privileged ones. Strategies will include the following: social gatherings and celebrations, local, national and international gatherings, residential seminars, opportunities for community, celebrations of prayer and liturgy. Any formation initiative or programme will endeavour to build in aspects of this element.

**Service to the poor and marginalised:** The care of the poor has been a constitutive element of the Gospel since the preaching of Jesus, and no age has lacked exponents of it. However, it has taken on new dimensions in recent

centuries and its understanding has been buttressed by the critical insights of the social sciences. Pope Leo XIII introduced a new level of reflection and a new body of Church teaching with the first social encyclical, *Rerum Novarum*, in 1891, on the condition of the working classes. Successive modern Popes have continued and developed this tradition. Progressively, this social justice tradition, termed by some as the "Church's best kept secret", has taken a genuinely critical stance to the culture, affirming what is genuinely human and challenging what is not. This is the process into which people today need to be inducted in practical ways. In being drawn to this service aspect, they are being drawn to the heart of the Gospel and to the person of Jesus. They understand well that Christianity is for living, not simply for pondering. It is recognised, too, that there is a particular kind of learning or formation that comes from regular contact with the poor and marginalised and from reflection on that experience. Volunteer experiences and exposure visits can be very powerful here.

**Attending to the story:** The explicit spelling out and exploration of the story of the Gospel tradition is a central element of formation. This, for many, is the most difficult facet. Religious language has become problematic in the post-modern context. Nevertheless, Christianity is a religion of the book and Catholicism prizes the place of doctrine. The challenge in regard to formation is to judge the readiness of individuals and groups for the explicit word and to utter it such a way that it works in concert with one or more of the other three pillars. The story will take on a particular character for various groups, be its stories of founders, histories of groups etc.

At its best, then, formation involves the four pillars of interiority, community, service of the poor, and attention to the story. Working together they provide a complex of experiences. The mix and the points of entry will be different for different groups. In the current post-modernist context, the process needs to be flexible, free-flowing and, to some extent, experimental.

There is a question which continually lurks in the back of my mind: what if you find that this is an absolutely impossible ideal? What do you do if you find that you just do not have the resources, the personnel, the context for attending to these realities? I have no stock answer, but I think it is something that needs pondering. Having spent almost four decades working in roles associated with adult faith development and trying to promote it as a priority, I just have to say again that we are paying a price for the neglect of adult catechesis in the Church and for excluding lay persons from real responsibility in the Church.



## Conclusion: Some Dos

**Do** create a constant process of conversation which refines the articulation of the mission, reflects on its implementation and creates structures that integrate formation at every level of the organisation.

**Do** regard the formation process as broader than programmes that are discrete in themselves and which are largely removed from management and operations.

**Do** integrate mission support services and formation personnel into the management structure of the organisation.

**Do** view all policies, including employment practices and criteria for employment, in the light of the articulated mission.

**Do** address the following *Four Pillars* of formation:

- Interiority - spirituality, prayer.
- Community - ministry-based, local Church, universal Church.
- Story - particular ministry, religious institute charism, Catholic scriptural and theological tradition.
- Service and solidarity with the poor and marginalised.

**Do** use and experiment with a variety of processes beyond the schooling model. ■■

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<sup>1</sup> Other presentations from this conference can be obtained from the conference organisers, Governance and Management on boards@governance.com.au

<sup>2</sup> John Paul II, *Christifideles Laici*, 58, 1988.

<sup>3</sup> Schneiders, S. *Religious Life in the New Millennium Vol.1, Finding the Treasure*. New York/Marwah, N.J. Paulist Press, 2000, pp. 282-312.

<sup>4</sup> Hehir, J. Bryan, "Identity and Institutions: Catholic Healthcare Providers Must Refashion Their Identity as Actors and Advocates in the World", *Health Progress*, November, 1995, p. 23.

