

# Apostolic Planning and the UAPs

Presentation to Major Superiors

March 2021



# Our starting point

**God laboring actively in love for the world with our collaboration**



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- A large stone cross stands on a sandy beach. In the foreground, a series of dark footprints leads from the bottom left towards the cross. The sky is filled with soft, white clouds, and the overall scene is bathed in a warm, golden light, suggesting a sunrise or sunset. The cross is a simple, weathered stone structure.
- Apostolic planning is about discerning:
    - What is really happening now in our life and mission, and in the world around us?
      - How has God's grace been working?
        - In our Jesuit life, communities, ministries, institutions
        - In the particular society and church where we live
        - In the wider world
      - What is the response God is inviting from us?
        - Apostolic plan

# Apostolic Institutions at the Service of Mission, 2014/01

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- An “apostolic plan ... identifies the goals, priorities and resources for service that a Province or Region contributes to the *Missio Dei*”
- “In this way the Province or Region shapes its identity, its dreams and hopes, its objectives and priorities in order to help Jesuits and their collaborators—as well as the apostolic institutions themselves—to continually renew themselves and progress decisively on the path toward greater service by putting into practice, with both realism and hope, the guidelines of the recent General Congregations.”

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# Echoes key themes of Ignatian Spirituality, esp. in the Spiritual Exercises

*Identity*

*Dreams*

*Objectives*

*Priorities*

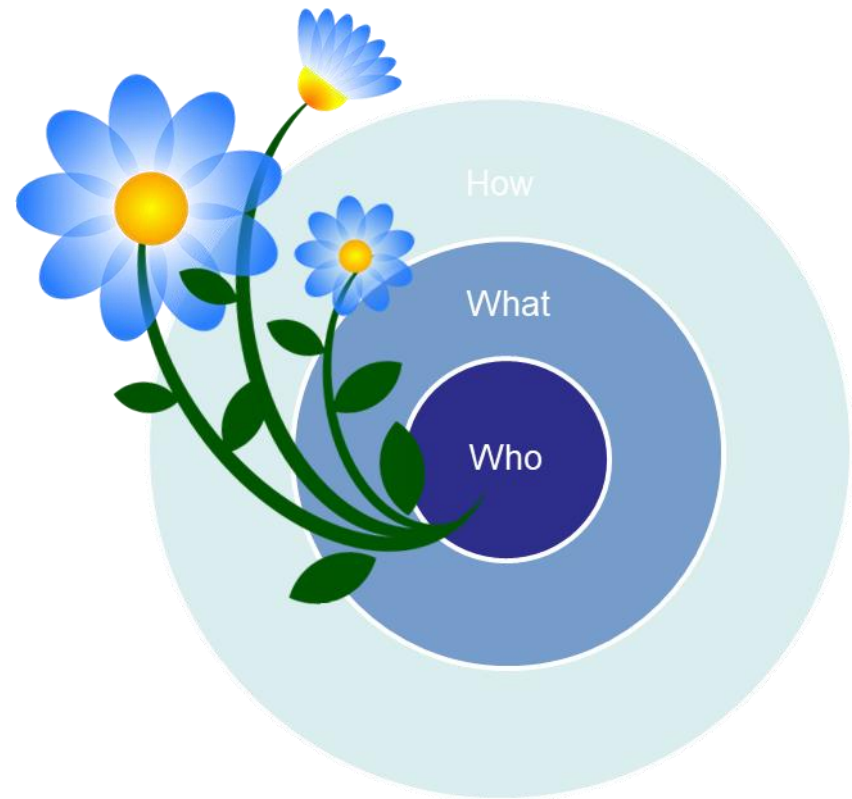
*Renewal*

*Path*


*Service*

*Putting into practice*

*Realism and hope*



“Guidelines of recent GCs”: The planning should be situated within an on-going tradition of what the Spirit has been saying to the whole Society

The background features a dynamic composition of flowing, translucent ribbons in shades of blue and green, creating a sense of movement and depth. These ribbons are set against a light blue background with a subtle, repeating hexagonal pattern that resembles a honeycomb or cellular structure. The overall aesthetic is clean, modern, and futuristic.

What do you think  
is currently in  
need of renewal in  
your province?

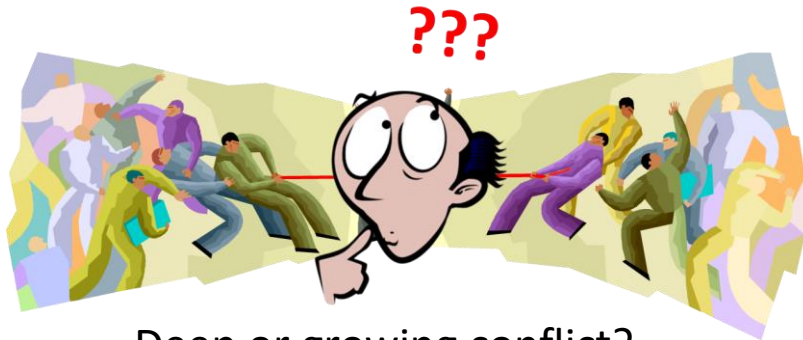


Each one running separate way in his own work?



Increasing difficulty in sustaining the works?

No longer responsive to signs of the times?  
(Stuck in routines, comfort zone, historical priorities, etc)



Deep or growing conflict?



Feelings of doubt about the direction?



Too many needs but limited personnel and resources?



## Apostolic Institutions at the Service of Mission, 2014/01

“Institutions carry with them potential risks. They can become outmoded and irrelevant, lose their religious and Jesuit identity, consume a large number of personnel and financial resources, and thus become obstacles to apostolic mobility, overlooking other creative apostolic initiatives.”

“It is not enough that the enterprise functions well, offers good service, enjoys prestige and is a place much sought out by people. It is an issue of knowing how or whether our institutions continue to be primarily apostolic instruments, clear about their primary aim of serving the mission of the Church and of the Society.”



Apostolic planning is a journey of  
**communal discernment** and **renewal**

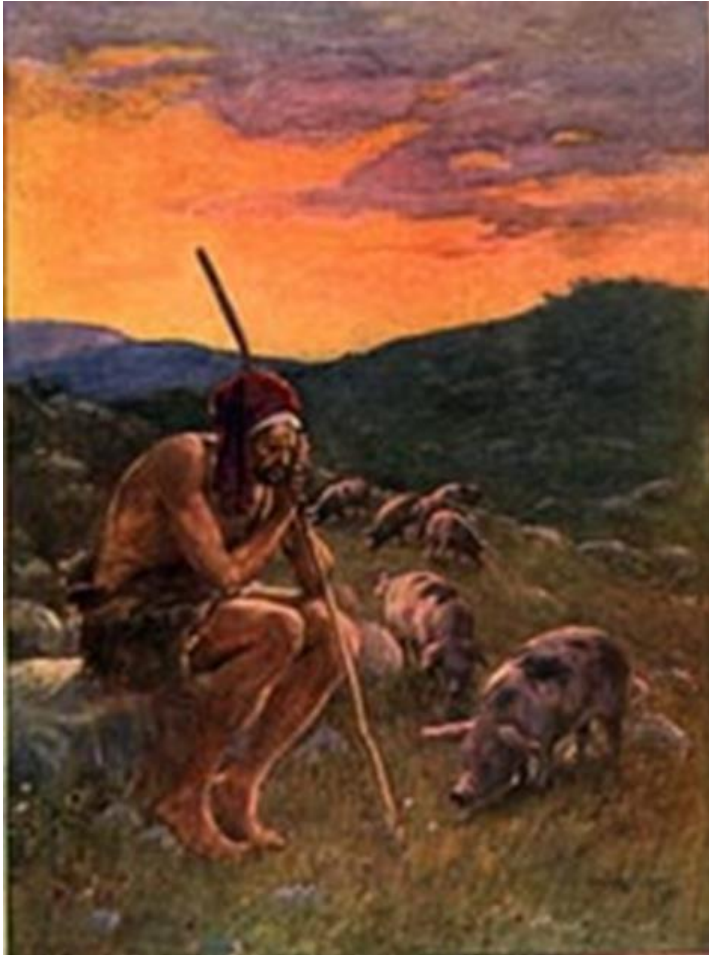
It is *how* we make the journey that matters.  
God's grace renews us *during* the journey.



# Main steps of the process

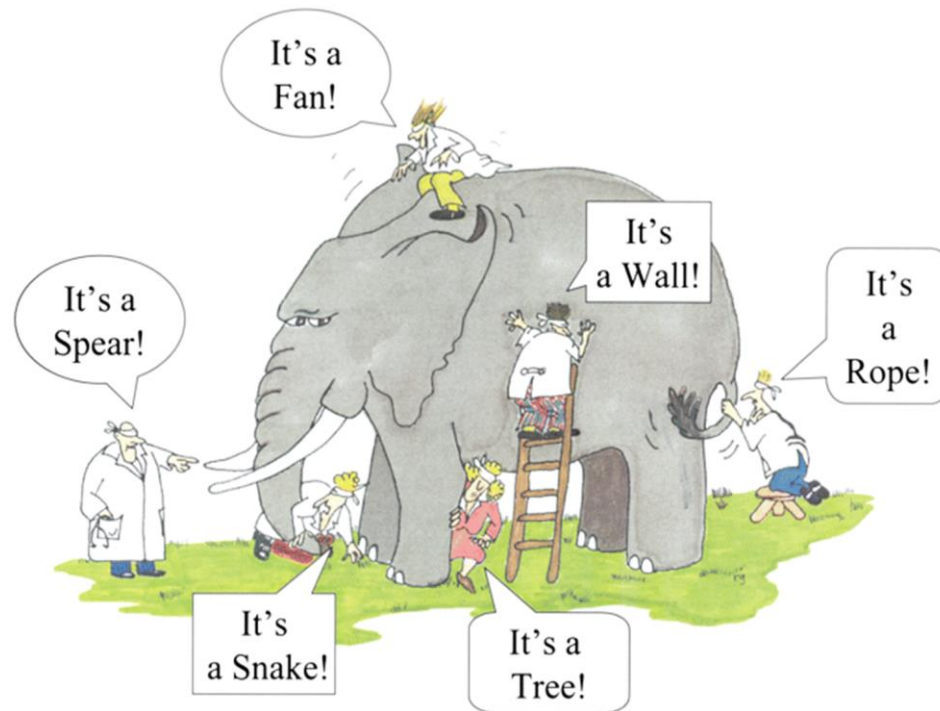
1. Realize our current situation
  2. Recall God's grace in our history
  3. Rediscover our mission and identity
  4. Reflect on signs of the times
  5. Recognize God's Call for the present time
  6. Respond in action
  7. Review our progress
- Follows the movements of Spex
  - A process of **transformation**

# 1. Realize our current situation



- How are we now?
  - What are the consolations and desolations in the province? Where do we find life? What has not been so life-giving?
  - What is God revealing to us about our current reality?
  - What graces do we rejoice in? What conversions do we need?
- 
- ❖ Method of situational discernment
  - ❖ Prayer, Reflection, Spiritual Conversation
  - ❖ Attentive loving presence to one another and to myself
  - ❖ Listening and sharing from the heart, rather than focusing on statistics

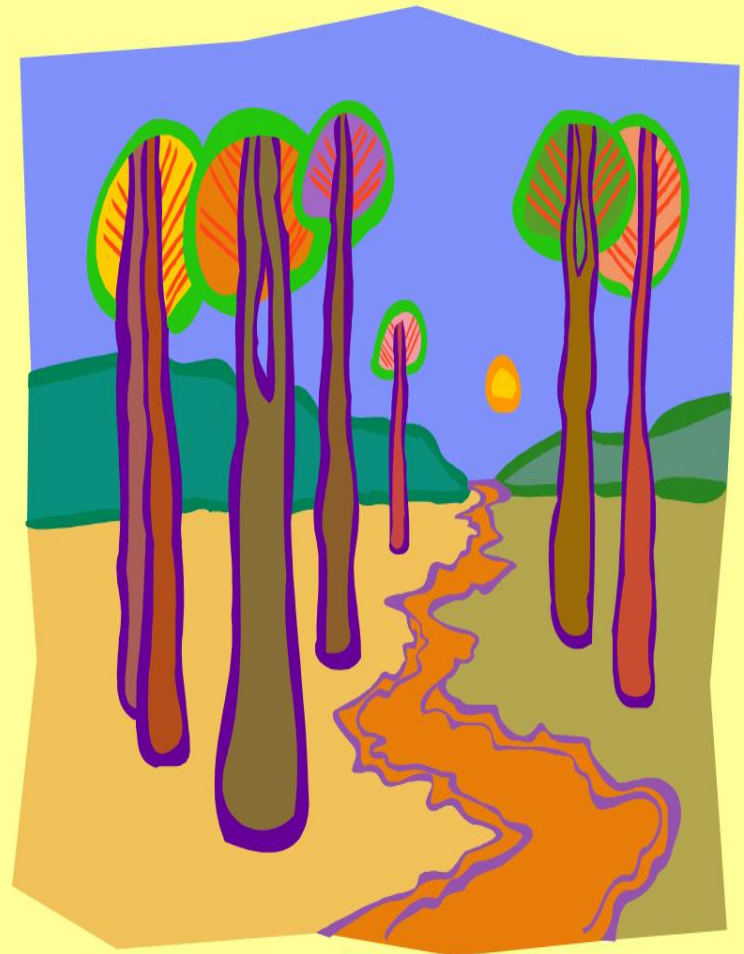
An authentic communal examen will bring to the surface resonances and contrasts in perspectives, feelings, experiences



- Welcome and listen to each one
- Seek to understand and empathize
- Gain insight into the collective reality
- Grow as a discerning body

## 2. Recall God's grace in our history

- Before we plan for the future, we need to appreciate the past
  - What were the significant milestones? The challenges and graces? The ways we have changed?
  - How has God been present?
  - What does that reveal about our life and mission, our identity before God?
- **Gratitude** for the past helps us to:
  - Regain a sense of our roots
  - Realize that change is a reality
  - Renew our confidence in God's fidelity
  - Acknowledge each others' contributions
  - Let go and be more open to moving forward



Institutions go through life cycles as the context evolves.

Recalling the past also helps us to locate ourselves along the journey



# 3. Rediscover our mission and identity

- The **compass** for planning
  - The *Missio Dei*, the Gospel vision
  - SJ mission and identity
  - Global orientations in current context: GC 36, UAPs
  - Local expression of SJ mission and identity
    - Enlightened by review of our graced history
    - The local realities



- More than just a written mission statement; **Mission and identity are alive and dynamic.** Our understanding undergoes development through time, inspired by God's Spirit
- We seek new life once again in the roots, seeing with new eyes, allowing God to move our hearts
- **Counters:** Individualism, populism, vain glories, dwelling in the past, being stuck in routines, and over-influence from funders and others
- Formative for both Jesuits and collaborators



# 4. Reflect on signs of the times

- Discernment is based on concrete realities
  - **Internal** situation, personnel, resources, fruitfulness, relationships, strengths and weaknesses
  - **External** contexts: current situation of world and church; emerging trends



- Listen in spirit of discernment
  - Invite voices inside the ‘box’; and also get out of the box to hear alternative views
  - Go to the margins, near to ground realities. Hear people’s stories. Look for both lights and shadows.
  - Listen with head and heart. Verify, reflect, ponder, pray. How is God moving in the context?
  - Pastoral listening leads to our conversion

# “Re-educating” our senses



# 5. Recognize God's call for the present time



- What is the Spirit asking of us?
  - Main direction for our life and mission in the next x years
  - Pertains to both apostolic mission and our conversions



## 5. Recognize God's call for the present time



- Main direction for our life and mission in the next x years
  - Needs to be a communal spiritual discernment
  - Shows us the way even in difficult times, unexpected storms, failures
  - Not to be changed in time of desolation
- Key priorities:
  - What needs closer attention in the next 5 years?
  - Apostolic priorities (Indicates the issue or concern you wish to address; the target groups; the transformation you desire, the particular role you play, etc)
  - Internal priorities (Improvements to *Cura personalis*, governance, resources, etc)

# 6. Respond in action

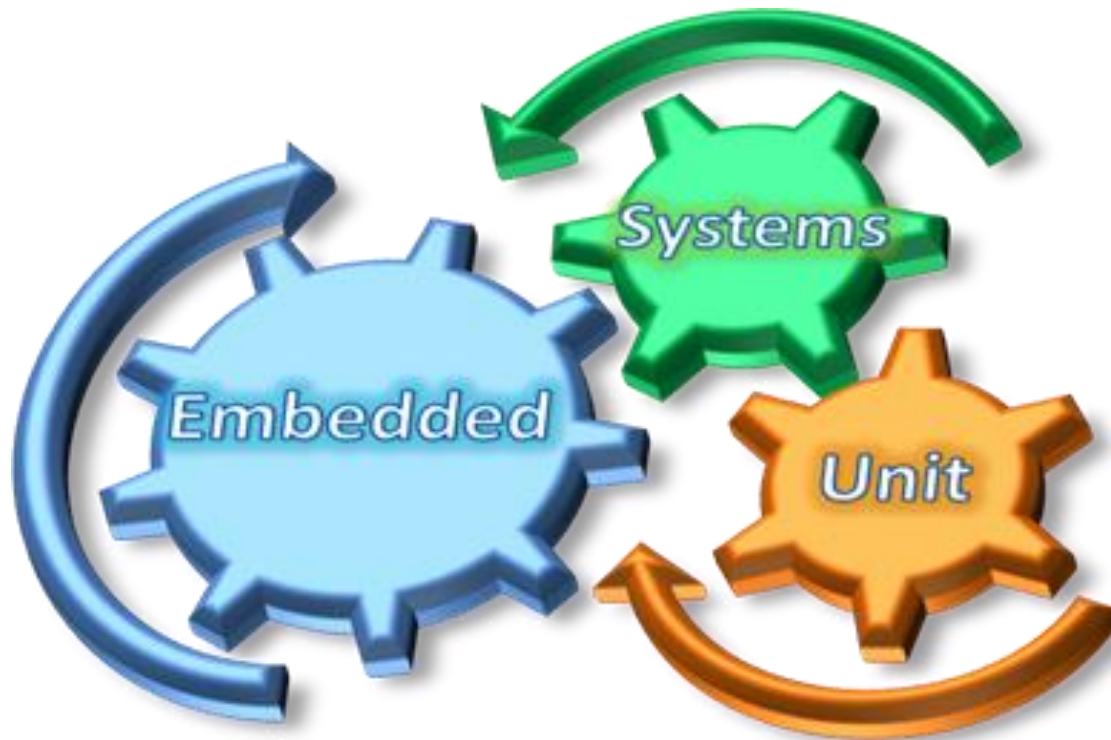
- Identify concrete goals:
  - What to change, strengthen, improve, start, discontinue?
  - Set targets where appropriate so as to guide allocation of personnel, time, and resources
  - Spirit of discernment
- Do action plan: What, Who, When
- Put in place the means for coordination and monitoring of implementation



# What changes are needed?

New priorities often do not fit with existing structures.

Hence need a systemic approach: What adjustments are needed in the current structures, policies, personnel, resources, activities in view of the new priorities?



# 7. Review our progress

- Regular communal spiritual examen of our life and mission. How are we growing (or not) towards the Call? How has God been present?
- Confirm or fine-tune priorities
- Make changes in the action plan if needed
- Widen the communication and collaboration
- Sustain growth as a discerning body
  - “Discernment in common is the prior condition for apostolic planning ... Thus, discernment in common and apostolic planning work in tandem to ensure that decisions are made in the light of the experience of God, and that these decisions are put into practice in such a way that they realize the will of God with evangelical effectiveness. (On Discernment in Common, 2017/11)

# Main steps of the process

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## General Outline of an Apostolic Plan

### I. Mission

....

### II. Context

.....  
.....

### III. Key direction for 2020-2030

...

### IV. Priorities (or "strategic goals") for 2020-2030

1. ....  
.....  
.....  
.....

2.

3.

### V. Targets (or "specific objectives") for 2020-2030

1. What, When (+who, where if relevant)

2.

3.

4.

5.

### VI. Action plan

Target	Main actions	Timeline	Responsible person and Collaborators
1.			
2.			
3.			
4.			
5.			

# How to incorporate the UAPs

- If you're going to begin apostolic planning:
  - Consider the UAPs when reflecting on mission (step 3) or when choosing apostolic priorities (step 5)
- If you're in the middle of apostolic planning:
  - Pray with UAP texts (Feb, Apr 2019 letters) before finalizing your apostolic plan. What is the Spirit saying?
    - Things to confirm
    - Things to deepen
    - Things to reconsider
- If you had already completed apostolic planning:
  - Have regular communal spiritual examen of progress. Pray with the apostolic plan and listen once again to the UAP texts. Do you feel moved to make certain adjustments to your apostolic plan? (eg. Specific goals, actions, target groups, etc)

# THE “THREE TIMES” FOR APOSTOLIC PLANNING:

1. As a regular process of renewal
  - At least once every 5-10 years, depending on type of community, stage of growth, and context
2. When there is currently no plan, and the province seems to lack focus, clarity, direction, unity, energy.
3. When the previous plan or the current ‘flightpath-by-default’ no longer seems relevant in a changing context
  - Importance of on-going examen and attentiveness to reality
  - Don’t make the decision alone. Consult others.



# The “three times” for NOT doing apostolic planning yet

- **When there is an acute crisis**
  - Eg. Country in political crisis, war, natural disaster, pandemic. Unpredictable daily changes in situation and/or need to focus on emergency response
  - Eg. Crisis in province or institution; eg. Scandal, unexpected major change, significant conflict, very low morale, insecurity, etc.
    - Focus on crisis response and wait for time of more stability
- **When the leader or leadership team needs to establish credibility**
  - E.g. Past plans not implemented; members are disillusioned with planning; feeling “planning fatigue”; New leader just appointed
    - Focus on listening and getting the house in order. Build trust and credibility first

# The “three times” for NOT doing apostolic planning yet

- When most people are new and lack experience, skills, relationships or commitment to participate meaningfully
  - Eg. New or neglected communities, new organization/province, or recent turnover of many personnel
  - Facilitate basic formation, information sharing, and relationship-building first

Conditions for discernment:

- Interior freedom
- Union of minds and hearts
- Basic knowledge and skills
- Desire to commit

# Preparation

## **Role of the leader:**

- Discern thru consultation – When is suitable time to embark on apostolic planning?
- Form a coordinating team to manage the process
  - Ensure their availability to focus on this task
  - Propose steps and timeline
- Discern about participation (Jesuits and collaborators) and external partners (stakeholders, facilitators, etc)
- Ensure adequate resources
- Communicate about it, clarify expectations, address anxieties
  - Reasons for embarking on the process
  - Emphasis on communal spiritual discernment
  - Steps, timeline, activities
  - Participation, roles, responsibilities
- Ensure training and orientation where needed (eg. spiritual conversation, UAPs, etc)

## Pastoral Planning Through Communal Discernment

*This website offers reflections and resources for pastoral planning by communities and organizations in the Catholic faith tradition and beyond. The information has been written with a broad-based audience in mind, since pastoral planning frequently and rightly involve a wide and diverse range of persons, whether as group members, staff, volunteers, or network partners, who belong to various faith and spiritual traditions, or have no religious affiliation. The suggested [process](#) for pastoral planning in this website can be used as a guide for each group to design its own steps in accord with its contexts and needs. The [principles](#) section can be used as material for background reading and reflection to help prepare participants or orientate those who are less familiar with the Catholic faith tradition. It is hoped that this website will aid many persons, communities, and organizations to experience a meaningful renewal of life and mission.*



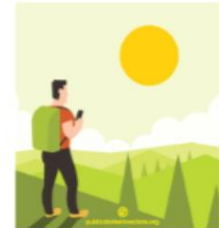
### **Who am I? Where am I going? What is life all about?**

These questions seem to be etched deeply in the human heart. They come to the surface whenever we face a personal crisis and the road ahead is not so clear. These same questions also come to mind when we desire to live and act intentionally and authentically. In each season of life, they resurface to beckon new answers.

For a community or organization, these questions are relevant too. **Who are we as a group? How did we come to exist? What is our common life all about? Do we have a unique contribution to make? Where should we go? What should we do now?** Just as for an individual, these questions are often triggered when there is a crisis, or when the group finds itself at the crossroads, and new stages of its journey require a re-examination of its priorities and way of proceeding.

Confronting these questions and following through on the answers is not easy because it often involves uncertainty, tension, letting go, and being open to change. However, this is the path that potentially leads to greater fullness of life. Conversely, avoiding the struggle or pain of dealing with these questions will only prolong the drift and dispersion of the group, and eventually lead to desolation and despair.

**Intentional and authentic living** as a community entails journeying through these questions on a regular basis, and carrying out their implications faithfully, evaluating along the way. It is a process that engages the whole community in heart, mind, and soul. As a result, the community grows fruitfully in its identity, values, life, and mission. A corresponding integration at the personal level among its members often happens as well.



## Step 1: Personal awareness and examen

### Guidelines for Personal Awareness and Examen

This is the first exercise in the pastoral planning process. Its objective is to help each participant become more interiorly centered, authentically present, and better prepared to participate in the pastoral planning more fruitfully and meaningfully.

You can set aside about half an hour for this private time of contemplation.

Find a quiet place where you can be in relative silence and interior attentiveness. If it helps, you can take a few minutes to quieten your mind, be present with God, or simply notice your breathing. When you feel ready, begin by asking for the grace of inner peace, openness, and insight.

Read the following questions and notice your reactions - What comes up in mind? How do you feel? What are your immediate responses? How would you answer these questions if you ponder them for a while longer?

- ◆ How am I doing? Where am I now?
- ◆ What have I been doing in the group? Where have I been spending most of my energy?
- ◆ What are my feelings as I embark on this process of pastoral planning? Why?
- ◆ Do I have any hopes, dreams, and desires? Or fears, anxieties, and discouragements?
- ◆ What might be some hindrances to my mind or heart?
- ◆ What might give me more inner freedom and confidence?
- ◆ How is God present to me now and what might be God's invitation to me?
- ◆ (Or: In a moment of deep silence and attentiveness, am I able to sense a Universal Life-force, or the loving presence of something larger than myself, or an Ultimate Source of Goodness? What might this Life-force be showing me or communicating to me right now? How do I feel about it?)

When you have finished reflecting on the above questions, hold in your mind and heart for a few minutes all the other participants who will be in the pastoral planning process, and acknowledge their presence as a profound gift.

Conclude by asking for the graces needed by yourself and your group in order to have a meaningful journey in pastoral planning.

After completing this exercise, it is helpful to review what happened, how you were loved, and what significant points struck you. You can write these down in a personal journal.



Apostolic planning is a journey of communal discernment and renewal  
It is *how* we make the journey that matters.  
God's grace renews us *during* the journey.

