

# GOVERNANCE AT THE SERVICE OF UNIVERSAL MISSION

## Introduction

1. General Congregation 35 establishes three principles to guide our consideration of governance in the Society of Jesus based on the experiences of recent decades and our apostolic mission:

a) *Our governance structures and ways of proceeding should flow from a perspective of greater universality.* This is in keeping with the directions set by previous General Congregations<sup>1</sup> and responds to the accelerated pace of globalization, the transnational and multicultural dimensions of the challenges facing the Church, and our desires to work more collaboratively throughout this universal Society.

b) *Structures of governance should be streamlined, modernized, and made more flexible where possible.* The Society is organized in function of its mission. We will serve that apostolic mission more effectively by simplifying some structures and procedures of governance, using modern methods of communication and collaboration, and introducing increasingly flexible structures at various levels.

c) *Changing circumstances require a better articulation of Ignatian values and ways of proceeding in our contemporary life and work.* Such changes as apostolic collaboration with others, the separation between apostolic institutions and community, and the development of an inter- and supra-provincial level of some ministries demand certain clarifications about how to exercise governance so that it might continue as genuinely Ignatian.

Following from these principles, we offer some concrete directions for the different levels and organs of our current structure of governance.

## I. GENERAL GOVERNANCE

### General Congregation

2. The General Congregation directs and authorises the General to undertake, in anticipation of General Congregation 36, a comprehensive revision of the *Formula of a General Congregation (FCG)*, and of the *Formulae* of the Congregation of Procurators and of the Province Congregation.

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<sup>1</sup> Cf. GC 31, D. 48, n. 8; GC 32, D. 4, n. 81; GC 33, D. 1, n. 46; GC 34, D. 21.

3. The revised *FCG* should be approved by GC 36 in its first sessions. After consulting with the Major Superiors and receiving the approval of the General Council by deliberative vote, Father General may approve revisions in the *FCG* that would take effect before GC 36, as well as any related changes in the *Formulae* of the Congregation of Procurators and the Province Congregation.

4. The revision should, in accord with the principles enunciated in the introduction (cf. n. 1), aim at better facilitating the effective, responsible, and adaptable use of the rich diversity of human and material resources that are employed in the preparation and conduct of a General Congregation, for the service of the life and mission of the universal Society. The revision should also respect, among other things, the following:

- a) The threefold character of the General Congregation as
  - a.1. the body which elects the General and which has a major role in the choice of the members of the General Council;
  - a.2. the highest instance of giving expression to the self-understanding of the universal body of the Society at a given moment; and
  - a.3. the supreme legislative body of the Society.
- b) Given the traditional conviction that a General Congregation is an exceptional occurrence in the governance of the Society, its work should be confined to “matters of greater moment” (*FCG* 1 § 2).
- c) The importance of the whole Society’s being represented in the General Congregation, especially in the Congregation *ad electionem*. In this context, at least two other matters are to be respected:
  - c.1. the number of elected members being greater than that of the appointed and *ex officio* members combined (cf. GC 34, d. 23 A, n. 1);
  - c.2. the presence of an adequate number of Brothers as electors.
- d) With regard to the duration of the General Congregation: the need to balance, on the one hand, a responsible use of limited resources, and, on the other, the creation of an atmosphere of Ignatian discernment in the proceedings.
- e) The need for a more thorough preparation of the General Congregation, especially in the work leading to the formulation of the *Relationes Praeviae* and the report *De Statu Societatis*, but without prejudice to the freedom of the General Congregation itself to determine the content of its deliberations. Such preparation may require the role of a Province Congregation in preparing for a General Congregation to be expanded.
- f) The rapid development of means of communication, as they affect both the preparation and the conduct of Congregations.

5. Of particular importance in preparing the General Congregation are the meetings of Major Superiors (cf. GC 34, d. 23 C, n. 4), of Presidents of Conferences (cf. GC 34, d. 21, n. 25), of electors of each Assistancy or Conference, and assemblies of various apostolic sectors. Each of these bodies could make a substantial contribution in the preparation of the General Congregation.

6. The Congregation of Procurators should be maintained, as representing the “rank and file” of the membership of the Society. As indicated above, however, its *Formula* should be reviewed along with and in consequence of the revision of the *FCG*.

## Central Governance

### *Principle*

7. The Superior General is a source of unity in the universal body of the Society.<sup>2</sup> The Congregation recognizes the rich diversity in the Society’s membership and the inculturation necessary and proper for carrying out our mission within the universal Church and in an increasingly globalized world. As governance in the Society is always measured in an appropriate balance of union and diversity, the office of General must be exercised in a manner which respects diversity while placing it at the service of our universal mission and identity.

### *Reorganization*

8. The General Congregation confirms the procedures to elect the four Assistants *ad providentiam* and to renew Father General’s Council determined by GC 34, d. 23 E, II, 1.

9. In order that the General may have the most effective support for carrying out his responsibilities, he is directed by this General Congregation to undertake a comprehensive review of the central governance of the Society, with a view to reorganization for the service of mission.

10. Included in the purpose of this review is the provision of the resources and staff needed to handle the ordinary business of the Society, while allowing the General the opportunity to do comprehensive apostolic planning and to animate the whole body of the Society.

11. This review should take account of but is not limited to:

- a) the framework provided by *NC* 380-386;
- b) the need for communication among the various persons and groups mentioned in *NC* 380-386, as well as between these persons and the General;
- c) the need for coordination and articulation of the functions of these persons and groups;

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<sup>2</sup> *Constitutions*, 666, 719.

- d) the importance of avoiding unnecessary “bureaucratisation” or unnecessary multiplication of officials and secretariats;
- e) the importance of developing appropriate job profiles, which would involve regular articulation of goals and expected outcomes, together with an effective mechanism for review and evaluation.

12. The General is encouraged to look to ways in which finances might be used more effectively and equitably for the service of the international mission of the Society.

13. A professional and comprehensive strategy needs to be developed to improve our internal and external communications, so as to facilitate governance, foster cooperation, and enhance the effectiveness of our universal mission.

14. The General is encouraged, in undertaking this review of central governance, to make use of the best professional assistance that is available within and outside the Society.

#### *Evaluation*

15. The General is asked to develop instruments and programs for assisting all those in governance (central, conference, provincial and local) to review the effective implementation of and accountability for their proper responsibilities. *Practica Quaedam* is to be updated to reflect these developments.

16. A review of the progress made in these matters should be included in the agenda of subsequent meetings with Presidents of Conferences. A more comprehensive report should be made at the next meeting with Major Superiors.

### **Conference of Major Superiors**

#### *Principles*

17. Since we are aware that “today many problems are global in nature and therefore require global solutions”<sup>3</sup>, we consider the Conferences of Major Superiors –at present Africa and Madagascar, East Asia/Oceania, Europe, Latin America, South Asia and USA– to be a significant initiative in the governance structure of the Society<sup>4</sup>. While recognising the authority of the General for universal mission, we hold the conviction that today cooperation among Provinces and Regions to realise the apostolic mission of the Society is an undeniable necessity.

18. The Conferences are expected to continue to be structural means that foster in all Jesuits a sense of universal mission, while facilitating union, communication, a common vision among the superiors, and inter- and supra-provincial cooperation. In order that the Conferences may respond more adequately to these aims, the following principles should be observed:

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<sup>3</sup> NC 395 § 1. Cf. also NC 395-400.

<sup>4</sup> Cf. GC 34, D. 21, nn. 21-28.

- a) Conferences are structures oriented for mission and not mere instruments of inter-provincial coordination. They must continue doing apostolic planning at the inter-provincial level, taking into account the apostolic preferences of the universal Society. This apostolic planning is the result of discernment among the Major Superiors of the Conference, should be approved by the General, and should be evaluated and revised periodically.
- b) Conferences are structures of cooperation among Provinces and Regions regarding specific inter- and supra-provincial aspects of mission (common works, formation centres, networking, inter-provincial teams, geographical regions, etc.). While Conferences do not constitute a new level of government between the General and the Provincials, they offer an opportunity to enhance the governance of Provincials by enabling them to care for the mission of the Society beyond their own Provinces.
- c) Conferences have followed varying courses of development in the Society due to regional differences. The Statutes of each Conference should, therefore, respect those differences and take into account the following:
  - c.1. The Statutes are to be approved by the General and should include the following points: the membership, their rights and duties, the matters that come under the Conference's competence, the method of making decisions, internal structures, the authority and duties of the President (in accordance with nn. 19-23), and in general, whatever is considered necessary for an expeditious and efficient functioning of the Conference.
  - c.2. Each Conference should adapt its Statutes in accordance with the orientations of GC 35.
- d) Conferences should have the resources necessary to attend to the financial needs of works and houses dependent on the Conference.

*President of the Conference*

19. The General appoints the President after appropriate consultation with the Major Superiors of the Conference. He has the faculties of a Major Superior to carry out the specific responsibilities entrusted to him by the Statutes of the Conference.

20. The principles of unity of governance (*cura personalis, cura apostolica*), subsidiarity, and sufficient authority to exercise one's office, are to be applied appropriately to the role of Presidents of Conferences in this way:

a) *Assignments:*

- a.1. In the area of his competence as defined in the Statutes, the President has authority to request and to assign persons from the Provinces or Regions needed for the activities and works dependent on the Conference. A basic criterion to make these

assignments is that, all other things being equal, the needs of Conference activities and works have priority over those of individual Provinces<sup>5</sup>.

a.2. Respecting the centrality of the account of conscience in missioning, any such assignment requires the consultation of the man's Major Superior, who is the one who makes him available for a mission in the Conference.

a.3. In those rare situations in which the President and the respective Major Superior cannot come to an agreement regarding an assignment, the matter should be referred to the General for resolution.

b) *Decision-making:*

b.1. In the area of his competence as defined in the Statutes, the President is to make decisions as he sees fit, after having heard and considered attentively the views of the members of the Conference.

b.2. Although the President is endowed with the proper faculties to make decisions, it is necessary to emphasize the importance of his moral authority with the Provincials, which will enable him to propose objectives for collaboration and to promote discerned consensus among the Provincials. He himself needs to be an especially good leader, prudent, tactful, and considerate (cf. *Const.* 667).

c) *Relations with Provincials and Regional Superiors:*

c.1. The existence of Conferences with their Presidents, as well as their decision making authority in the inter- and supra-provincial sphere, implies that Provincials and Regional Superiors are involved in a new way of interconnection and interdependency, and are oriented toward cooperation.

c.2. The President does not have any direct authority in the internal governance of the Provinces nor does he supervise it. Provincials depend directly on the General. They are accountable to him in what concerns the internal governance of Provinces; they are accountable to the President in the strict area of his competence.

c.3. In exercising apostolic leadership, the President should be involved, as appropriate, in the apostolic discernment of Provinces and Regions.

21. The President is also the Major Superior of the common houses and works of the Conference, which the General has designated as such. In this sense,

a) the President, together with the other Major Superiors, has the responsibility to provide the human and financial resources needed for houses and works dependent on the Conference;

b) the President hears the manifestation of conscience of the Jesuits assigned on a stable basis to common houses and works;

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<sup>5</sup> The second sentence of GC 34, D. 21, n. 24 is thus modified.

c) the President has the responsibility for the ongoing formation and health care of the Jesuits assigned to common houses and works.

22. The President of the Conference attends a General Congregation as an *ex-officio* elector.

23. The Presidents of Conferences shall meet together with the General at least once a year, or whenever called by him for consultation on important matters<sup>6</sup>.

## II. PROVINCE GOVERNANCE

### The nature of the Province

24. While our vocation is to the universal Society, Provinces have been established for greater apostolic effectiveness and more effective governance so that the specific articulation of a Jesuit's mission is the direct result of the animating leadership of the Provincial.

Essential in this governance is the manifestation of conscience, conducted in an atmosphere of transparency and trust that enable the Provincial to assign men to specific ministries after discerning carefully how the holy desires, needs and gifts of his men meet the needs of the Province's apostolic plan and works alongside those of the Conference as well as the apostolic preferences established by the General.

25. Through the centuries, the structure of Province governance has had much to commend it in apostolic and administrative efficiency; respect for varied cultural, linguistic, national and regional traditions; and the effective uniting of *cura personalis* with *cura apostolica*. Given today's globalized context within which Jesuits exercise ministry, sophisticated communications technologies, growing apostolic networks, and transnational realities, new challenges and new opportunities for ministry require reflection, formation, and concerted action that enables us to think and act across Province and even Conference boundaries.

This constantly evolving context calls for greater and better coordination and cooperation among Provinces (for example, in apostolic planning and financial administration) at the service of our universal mission. It also suggests a need for consideration of how Provinces can best be governed including the regular evaluation and review of effective governance, apostolic plans, administration of apostolic resources, and engagement with other Provinces through Conference structures (cf. *supra* nn.19-20).

26. With a view towards better serving our universal mission, the General Congregation requests the General to commission a process of reflection on Provinces and Province structures which will lead to practical proposals for adapting this aspect of our governance to today's realities. This commission's responsibility should include a comprehensive review of the criteria for the establishment (cf. *NC* 388), reconfiguration, and suppression of Provinces and Regions. The criteria would include numerical and geographic size, age distribution, availability of effective leadership for governance and formation, financial viability, and

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<sup>6</sup> Cf. GC 34, D. 21, n. 25.

capacity for developing a comprehensive apostolic plan which meets local, regional, and universal needs. The progress of this commission's work should be presented at the next meeting of Major Superiors.

### **Province and Local Church**

27. It is particularly important that the Provincial actively pursue good communication and harmonious relationships with the Bishops of the local Churches in which we serve. This would include the expectation that local superiors and directors of works be encouraged to do their part in the fostering of such relationships.

### **Province Planning and Decision-Making**

28. The Society's law (cf. especially *NC 354 § 1*) strongly encourages a participatory and discerning approach to decision-making at all levels, including that of the Province<sup>7</sup>. So that this approach may be even more effective, care needs to be taken that:

a) it remain clear that it is the appropriate superior, not a consultative body, that makes the final decision (cf. *NC 354 § 1*).

b) there be sufficient clarity about the process for planning and decision-making, with the specific roles of various commissions and officials being adequately communicated to members of the Province.

c) the role of the Province Consultors, as laid down in universal and proper law<sup>8</sup>, be respected. This role should not be eroded by the responsibilities rightly given to staff, officials, or commissions.

d) the Commission on Ministries (cf. *NC 260 § 1*) be an effective instrument for apostolic planning and its review, especially as this relates to established works and ministries of the Province, the creation of new apostolic works, and the ongoing apostolic formation of collaborators.

e) the legal and economic aspects of any decision should be considered.

f) there be structures for implementation and ongoing evaluation of the effectiveness of Province plans.

### **Apostolic Works of the Province**

29. Another critical aspect of the Provincial's governance is comprehensive care for the Province's apostolic works, including a thorough evaluation of their contribution to the Society's mission and of their Jesuit character. These works should be visited regularly by the Provincial (or his delegate) (cf. *NC 391 § 3*), a report of which is to be included in his letters

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<sup>7</sup> Cf. *Guidelines for Provincials*, 30-35, *AR 23,1* (2003) 297-298.

<sup>8</sup> Cf. *Guidelines for Provincials*, 30, *AR 23,1* (2003) 297.

to the General. When the director of a work is someone other than a Jesuit, that director is expected to report on the work during the Provincial's visitation. A comprehensive articulation of the relationship between apostolic works (including international works of the Society) and the Province is expected and would include written agreements as helpful or required.

### **Training for Leadership**

30. Leadership in the Society today is a very demanding ministry. The need for international cooperation, new structures for partnership with others, and heightened expectations about the quality of community life are only some of the factors that call for new attitudes and new skills in superiors and directors of works at all levels of governance. Specific formation for Jesuits and others in positions of leadership is needed.

31. Ongoing formation in such attitudes and skills will often take place at the Province level, although there will also be many occasions when Conference-wide programmes will be extremely helpful. Critical areas for such training include:

- a) Principles of Ignatian leadership, including the practice of apostolic discernment in common.
- b) Formation in an attitude that enables one to work as a member of a team<sup>9</sup>.
- c) Principles of leadership in general.
- d) Management skills in areas such as:
  1. financial administration
  2. human resources
  3. planning
  4. conflict resolution
  5. confrontation
  6. conducting meetings
  7. crisis management
  8. media and public relations
- e) Skills required for effective membership of a board of governance.

32. In addition to leadership training courses or workshops, there is great value in using forms of apprenticeship and mentoring. In appropriate ways potential leaders can be identified and be put in situations where they can learn from an experienced and wise leader.

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<sup>9</sup> Cf. *Guidelines for the Relationship between the Superior and the Director of the Work*, 16, AR 22 (1996-2002) 386-387.

### III. LOCAL GOVERNANCE

#### Local Superior

##### *Principles*

33. The effectiveness of the local superior is critical to the apostolic vitality of the Jesuit community as a sign to the world of the Reign of God which we proclaim by our lives together. For Ignatius, love for the members of his community was to be the distinguishing mark of the Jesuit Superior<sup>10</sup>. From that starting point, the Superior can encourage the mission of apostolic men and ensure the quality of religious and community life that enables them to fulfil their mission<sup>11</sup>.

In a spirit of service, the Superior supports the members in their apostolic responsibilities and religious lives as servants of Christ's mission. These duties require an intimate knowledge of each man made possible by regular spiritual conversation and, where appropriate, manifestation of conscience. With such aids, the Superior can help each Jesuit to see how his apostolic work, assigned by the Major Superior, is properly integrated into the universal mission of the Society, promoting the sense of apostolic solidarity of all the community members, even of those who may be engaged in very diversified activities<sup>12</sup>.

34. From his privileged place at the heart of the community, the superior is also responsible, together with each member, for developing its apostolic life. Concretely, this commits the local superior to lead his community in a Jesuit common life characterised by the celebration of Eucharist, prayer, faith sharing, communal discernment, simplicity, hospitality, solidarity with the poor, and the witness that "friends in the Lord" can make to the world.

The General Congregation insists once again on the importance of the mission of local superior and emphasises the relevance of the points described in the *Complementary Norms*<sup>13</sup>.

##### *Challenges*

35. Actual practice has not always followed the guidelines presented in the *Complementary Norms*. The General Congregation recognizes that several factors jeopardize the proper fulfillment of the mission entrusted to the local superior:

a) Communities are of different types: in some of them, Jesuits have received very different missions in a great variety of places; other communities are closely linked with the life of a particular apostolic work (directed by a member of the community or by another); other communities mix a number of Jesuits involved in the one apostolic work and other Jesuits whose missions take place in other institutions.

b) It is fundamental that every Jesuit be able to maintain a direct relationship with his Major Superior; but ready access to modern communication technologies can facilitate

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<sup>10</sup> Cf. *Guidelines for Local Superiors*, 11, AR 22 (1996-2002) 368.

<sup>11</sup> Cf. *Guidelines for Local Superiors*, 33, AR 22 (1996-2002) 373.

<sup>12</sup> Cf. NC 403 § 2.

<sup>13</sup> Cf. NC 148, 151, 226, 323, 324, 349-354, 403, 406-407.

bypassing the local superior to directly communicate with the Major Superior in ways which undermine the proper relationship with the local superior.

c) It is often too easy to minimize the importance of decision making at the local level by concentrating too much authority at the provincial level, in apparent violation of the principle of subsidiarity in governance.

d) In some circumstances, relationships between local superiors and the director of the work, whether Jesuit or not, are a source of confusion and even conflict.

### *Recommendations*

36. The General Congregation recommends that, in each Province or Conference of Major Superiors, formation sessions be developed in order to assist new superiors to come to an understanding of their mission and to learn practical ways of carrying out that mission.

37. The General Congregation recommends that Major Superiors set up regular meetings of local superiors; with the following objectives: to promote mutual support among superiors; to encourage discernment among those in charge of apostolates; and to facilitate ongoing formation in the mission of local superior.

38. The General Congregation recommends that Major Superiors allow for proper application of NC 351 by assuring that the Superior's primary responsibility is the animation of the local community.

39. The General Congregation recommends that superiors acquire a good knowledge of the *Guidelines for Local Superiors*. They are to make a responsible application of the *Guidelines* (i.e. adapted to the local situation), with particular attention given to the proper use of the house consult<sup>14</sup>.

### **Superiors and Directors of the Work**

40. The relations between superiors and directors of the work must be developed in accordance with the *Guidelines for the Relationship between the Superior and the Director of the Work*; these must be adapted to the local context in dialogue with the Major Superior.

41. The superior must have a clear awareness of his responsibility regarding apostolic works and be prepared to exercise it. The director of a work must know to which superior or Provincial delegate he is called to give an account of his apostolic action.

42. It is important for the Major Superior to consider ahead of time the ways in which the relationship between the director and the relevant local superior will develop<sup>15</sup>. Often this relationship will also be formed with those in charge of institutions which are under the jurisdiction of civil law. Account must be taken of the requirements of both civil and canon law, and the relations between the two.

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<sup>14</sup> *Guidelines for Local Superiors*, 18, AR 22 (1996-2002) 369-370.

<sup>15</sup> Cf. *Guidelines for the Relationship between the Superior and the Director of the Work* 18, 19, 23, 26-29, AR 22 (1996-2002) 387-388; NC 406 § 1-2.