

THE STRUCTURE OF THE DOCUMENT

By HOWARD J. GRAY

SOME YEARS AGO ELISABETH SCHÜSSLER FIORENZA called attention to the interpretative principle that context is as important as text. 'What we see depends on where we stand. One's social location or rhetorical context is decisive of how one sees the world, constructs reality, or interprets biblical texts.'¹

What is true of biblical texts is even truer of an ecclesial text like *Directives on formation in religious institutes*. Scripture is for all times; this instruction is basically a document for contemporary religious women and men. It is important to keep the relativity of the document in focus even when its authors cite enduring values and important principles. The document does what it claims to do, i.e., to deal 'with provisions and orientations approved by the Holy Father and proposed by the *dicastery* with a view to clarifying the norms of law and assisting in their application' (*Directives*, Introductory Note).

I insist on the relativity of the instruction because the document itself does no less: 'These provisions and orientations presume the juridic prescriptions which already are in effect, referring to them on occasion, and in no case derogating from them' (*Directives*, Introductory Note.)

There are three contexts which help us read the document. Each context offers a different way of structuring the contents and the emphasis of *Directives on formation in religious institutes*. The three structural interpretations I suggest are the legal-institutional, the psycho-religious developmental, and the apostolic. These three structural interpretations are related to one another and can be and should be integrated. Nonetheless, people in formation are going to come to the instruction with different concerns and expectations. Where they stand will determine what emphasis they read in the document. Moreover, any authentic synthesis of meaning will depend on how one respects the variety of approaches, of structures, which hold the directives in creative tension.

Legal-institutional structure

The first reading depends on the structure which emerges from the technical character of the instruction. The anonymous authors of the

document call it *Directives* but with 'the weight of an instruction according to the code of canon law' (*Directives*, Introductory Note). Its publisher is the Congregation for Institutes of Consecrated Life and Societies of Apostolic Life (CIVCSVA). We have, in sum, a Vatican document. The questions are: how official? and what kind of document?

Vatican congregations, including CIVCSVA, have administrative, not legislative, authority.² These congregations act, as CC. 334 and 360 remind us, 'in the name of' and 'by the authority of' the pope. Regarding the *Directives on formation*, papal approbation is clearly cited at the close of the entire document:

In an audience granted to the undersigned cardinal prefect on November 10, 1989, the Holy Father approved the present document of the congregation for institutes of consecrated life and societies of apostolic life and authorized its publication under the title *Directives on formation in religious institutes*.

The term 'directives' has no particular canonical significance. It is like the term 'guidelines'. 'Guidelines' is perhaps more descriptive of what the congregation intends the document to be than is the canonical term 'instruction'. Nevertheless, the canonical term which is significant is that of 'instruction'. The canonist Francis Morrissey has written a helpful clarification about canonical instructions:

A rather common form of pronouncement by the Roman Curia is the instruction which clarifies the prescription of laws and elaborates on and determines an approach to be followed in implementing them (c34). The canon also states that 'regulations found in instructions do not derogate from laws, and if any of them cannot be reconciled with the prescriptions of laws, they lack all force'.³

Morrissey later comments that this form of document, i.e., the instruction, along with the declaration, has caused the greatest difficulty in interpretation in the post-Vatican II era. Moreover, because these texts are not strictly speaking legislative, their application 'allows for more leeway than would a decree'.⁴ Consequently, the present document, issued by the congregation with the pope's approval, is an important statement about formation. It reveals the mind of the Holy See and is intended to be taken seriously by those charged with enforcing current canon law. At the same time, the instruction has its limits; it serves existing law and is subordinate to it.

What I have encapsulated here is the inspiration for the fundamental, most obvious structure of the instruction. It is a document organized to clarify, to elaborate and to help implement existing laws. Indeed, the typography of the text we have received reinforces this emphasis on law and on institutional good order: an *introduction* which underscores the intention to give *valuable directions for religious life in its entirety* followed by *six sub-divisions* covering religious consecration and formation, aspects common to all stages of formation, the stages of religious formation, contemplative-life formation, some specific questions about formation, religious candidates for orders; and then a brief conclusion. This finality—to serve existing law—and this arrangement of topics suggest a structure organized around order and closure, by superiors to the next, lower rung of superiors. The text reinforces this structural interpretation:

The Congregation for institutes of consecrated life and societies of apostolic life deems it useful, and even necessary, to address this present document to major superiors of religious institutes, and to their brothers and sisters charged with formation, including monks and nuns, all the more so since many of them have requested it. It does so in virtue of its mission of giving guidance to institutes. This can help them to elaborate their own programs of formation [*ratio*], as they are obliged to do by the general law of the church.[4]

There is, of course, a danger in limiting our reading to juridical and institutional ordering. In fairness it must be asserted that the instruction urges more than good order and closure: it presents a reverent awareness of the mystery of a religious vocation.

At the origin of the religious consecration there is a call of God for which there is no explanation apart from the love which he bears for the person whom he calls. This love is absolutely gratuitous, personal, and unique. It embraces the person to the extent that one no longer pertains to oneself but to Christ. It thus reflects the character of an alliance.[8]

The exploration of this personal call and its development in the history of religious women and men constitutes a second, more interior structuring of the instruction.

Psycho-religious developmental structure

In a recent study of holistic Christian spirituality, Wilkie Au describes the essential experience which characterizes a second way

of reading the instruction:

Like a map, spirituality is useless if it is not based on the existential terrain those following it must traverse. But, even more critical is the realization of travellers that a map is indeed necessary. And this realization results only when they are in touch with their enmeshments, their way out of a perplexing entanglement which blocks progress.⁵

There is a religious structure which centres on experience, on the pilgrimage quality of life, on the gradual awakening to the directions one is summoned to follow, on the emerging choice, so personal to each heart, which can mean life or death to the spirit. Such a structure is less the imposition of an order or the result exclusively of legal obedience and much more a psychological acceptance of a call whose meaning and exclusivity grow and define how a woman or man will live. It is a structure based on uncovering relationships. When it is founded on God, it is, of course, a profoundly religious structure.⁶ The instruction can, and should, be read from this religious context. For as the introduction to the instruction notes: 'Men and women religious have the right to know the position of the Holy See on the present problem of formation and the solutions it suggests for resolving them'[4]. The operative word in that citation from the instruction is 'problem'. It is one reality to lay out laws and to sustain institutional order; it is another reality to recognize the human progress required to incorporate law into an identity that gives life and inspiration:

The primary end of formation is to permit candidates to the religious life and young professed, first to discover and then later to assimilate and deepen that in which religious identity consists. Only under these conditions will the person dedicated to God be inserted into the world as a significant, effective and fruitful witness. [6]

Discovery, assimilation, and deepening—these constitute a kind of wisdom structure.⁷ If one uses that structure in approaching the instruction, something like the following emphasis will emerge from the text.

Parts I and II of the instruction, which deal, respectively, with religious consecration and formation and then with aspects common to all stages of formation, have parallel sub-structures, i.e.:

Part I

[8]-[9]: Call from God out of love to which a person freely responds

[13]-[15]: This response needs a pedagogy, an education, a training in the vows as constitutive elements of religious life

[16]-[18]: From this cultivated call emerges a variety of charisms which enrich the community of the Church

Part II

[19]: Spirit acts within the human heart to inspire humility and discernment

[20],[27],[30]-[32]: Progress in religious life needs an environment which exemplifies the meaning of religious life

[25]: This progress finds continued verification in an increasing openness to be in communion with the Church and one's particular religious institute

Three psycho-religious realities have been emphasized: God's call/inspiration, furthermore, needed human co-operation in order to develop into an intentional communion with others and with God.

Parts III and IV treat various developmental issues which are part of psycho-religious growth. For all the concern with law, the authors of the instruction realize as well that 'it certainly is not required that a candidate for the religious life be able to assume all of the obligations of the religious life immediately, but he or she should be found capable of doing so progressively' [42]. This respect for the developmental character of religious formation is echoed in the treatment of the novitiate as 'a time of integrated initiation into the form of life which the Son of God embraced and which he proposes to us in the gospel . . . ' [45]. Formation directors are reminded that novices differ among themselves in their degrees of human and Christian culture. Therefore, those charged with formation of novices have to be sensitive to individual pacing and to the adaptation of content and modes of communication to the graces, temperaments, and talents of the novices [51]. There are other sections in the instruction which similarly emphasize this developmental process as, today, a component of sound formation: e.g., [55], [56], [58], [59] and, concerning continuing formation of the professed, [66]-[71].

Inherent in the care for psycho-religious development is a sensitive awareness of 'the conditions of youth in the modern world' [43]. The instruction quotes Vatican II's assessment of young women and men as 'the hope of the church' [86], attesting to their idealism, energy, and generosity [87]. But the instruction also cautions that contemporary youth's 'doctrinal and ethical frames of reference tend to be relative' [88]. This kind of doctrinal-ethical relativity confronts vocation promoters with special problems:

It is the discernment of vocations that is of concern here. Above all, in certain countries, some candidates for the religious life present themselves because of a more or less conscious search for social gain and future security; others look upon religious life as an ideal place for an ideological struggle for justice. Finally, there are others of a more conservative nature who look upon religious life as if it were a place for saving their faith in a world which they regard as being hostile and corrupt. These motives represent a reverse side of a number of values, but they need to be corrected and purified. [89]

The above reflection on the parameters of mixed motivations for entering religious life strike me as both perceptive and fair. The sensitivity of the authors of the instruction towards the need to accommodate ideals to reality is obvious in their insistence on adaptation, e.g., [58]-[61] and, of course, all of Part IV which treats contemplative-community formation.

While the developmental emphasis provides an attractive alternative to the legal structure of the instruction, developmental reading also has its limitation. 'Whatever the insistence placed upon the cultural and intellectual dimensions of formation by this document, the spiritual dimension retains its primacy' [35]. The reason for the primacy of the specifically spiritual over the merely psychological has been spelled out earlier in the document: the Spirit whose action is 'of another order than the findings of psychology or visible history' may work through psychology and history but 'works with great secrecy in the heart of each one of us' [19]. It is this geography of the heart which the instruction not only recognizes but invites religious to explore. It is also the reason that I call this second structure *psycho-religious* developmental.

Apostolic structure

The instruction speaks to all religious, contemplative as well as active [4]. Nonetheless, major superiors and formation directors

from apostolic institutes will necessarily read the document with their particular missions in mind. The instruction has an apostolic structure as well as legal and psycho-religious developmental ones. In what follows I underscore two aspects of the apostolic structure: what is said positively and what appears more ambiguous in its appreciation of the apostolic dimensions of formation.

First, the instruction makes an effort to incorporate the reality of apostolic mission or service as an essential element, for many, of religious life.

The formation of candidates, which has as its immediate end that of introducing them to religious life and making them aware of its specific character within the church, will primarily aim at assisting men and women religious realize their unity of life in Christ through the Spirit, by means of the harmonious fusion of its spiritual, *apostolic*, doctrinal, and practical elements. [1] [Emphasis added]

The inclusion of the apostolic as partly constitutive of sound formation—for apostolic religious—is also emphasized in the ways in which the instruction treats integration [3], insertion into the world [6], transformation of the world [12], the vow of evangelical poverty and the preferential option for the poor [14], obedience and mission [15], the variety of services religious perform in imitation of Christ [16], in the love of neighbour, salvation of the world, and building up of the Church which should characterize religious commitment [17]. In the final paragraph of Part I of the instruction, its authors urge that religious formation today should effect a *unity of life* founded on *four great fidelities*: to Christ and the gospel, to the Church and its mission in the world, to religious life and to the charism of the particular institute, and, finally, to humanity and our times [18].

Later, in inviting religious to live fully 'within the church' as 'people on a journey', the instruction offers six characteristics of this pilgrim people. The last of these six characteristics is to be 'a missionary people . . . ever seeking to have the gospel announced to every human being' [24].

In describing content and the ways to implement initial formation, the instruction suggests programmes which propose high ideals in order to form religious who can meet the requirements and expectations of the contemporary world [61]. In that same section concerning the formation of the temporarily professed, the instruction enunciates a sound apostolic pedagogy:

Finally, the maturation of a religious at this stage [i.e., of temporary profession] will require an apostolic commitment and a progressive

participation in ecclesial and social experiences in keeping with the charisms of their institutes, and taking into account the aptitudes and aspirations of individuals. [62]

The document does also caution that these apostolic experiences be formational and not a premature insertion of a young religious into full apostolic activity [62]. A similar caution about how even formed religious are to respond to apostolic needs is sounded. The instruction calls professed religious to consider the need for enrichment in order to retain 'an intelligent attention to circumstances and an outlook cautiously directed to the signs of the times' [67].

These citations from the text of the instruction illustrate a pattern of positive approach towards the role of apostolic service in formation. The pattern argues to a structure. At the same time there are other areas where the pattern is more ambiguous, perhaps in places even uneasy, about apostolic demands interfering with formation.

An example of this ambiguity (perhaps uneasiness) appears in Part III of the instruction. Here the authors enumerate the legal requirements for admission into the novitiate [43]. None of these requirements touches the apostolic desires of a candidate to serve others, to do the work of the kingdom, to be part of a mission. The instruction merely repeats a canonical list which, for apostolic religious, represents a serious omission. In fairness, I should also indicate that the instruction calls attention to what it will later develop about the 'conditions of modern youth' (i.e., in [86]-[88]); and in that subsequent treatment many of the attitudes cited could be read as potentially apostolic qualities. Still, these are never cited specifically as qualities which a vocation director should look for in a candidate. Within the tradition with which I am most familiar, for example, Ignatius Loyola has placed a process 'very much like the (*Spiritual Exercises*, conducted with the same care for withdrawal, direction, and discernment',⁸ the so-called General Examen. In this process the candidate to the Society of Jesus is able 'to sound out the depths or the solidity of his election of this way of life'.⁹ The General Examen places this description of the Jesuit vocation before the candidate:

The end of this society is to devote itself with God's grace not only to the salvation and perfection of the members' own souls, but also with that same grace to labour strenuously in giving aid toward the salvation and perfection of the souls of their fellow men (and women).¹⁰

This apostolic intentionality governs the entire discernment of a Jesuit candidate. It is what is meant by being called to apostolic

service. From my experience in Jesuit formation and governance, I cannot insist enough that from the outset candidates for an apostolic institute be tested to exhibit a charism for helping other people, for being active labourers for the kingdom, for being men and women for others. Self-transcendence must be a requisite for any religious vocation; but it is an especially sensitive locale for discernment in assessing a vocation to an apostolic community. The end of an apostolic community includes the cheerful readiness to transcend the comfort and, yes, the safety of community life when the needs of other women and men cry out to apostolic religious.¹¹

While the instruction lauds community life as having 'a privileged role in formation at every stage' [26], it does not develop as well the privileged role of apostolic service in forming apostolic religious. Indeed, at times there seems to be a bias towards community as being the ideal place for formation. Thus, in speaking about inserting a formation community among the poor, the instruction, while acknowledging such insertion could be helpful, warns

that the requirements of formation should prevail over certain apostolic advantages that come from an insertion into a poor *milieu*. It must be possible to realize and maintain solitude and silence, for example, which are indispensable during the whole time of initial formation. [28]

It would have been good had the document also developed how contemplation can also take place within activity as well as in solitude and that an essential part of apostolic pedagogy is to help young religious or those religious who are young in religious life to learn *from experience* how to find God in all things—even realities beyond community and solitude. Such experiences need supervision and reflective analysis. But they have to be provided early in religious life.

While the instruction, quoting *Renovationis causam* of 1969, commends 'that cohesive unity whereby contemplation and apostolic activity are closely linked together' [47], it does little to explore what that unity means. I suspect that the reason community, solitude and silence are emphasized and apostolic service muted as constitutive elements within formation is that the authors of the instruction wanted to offset the activism which marks the lives of many contemporary candidates (e.g. [50]). But there is profoundly ascetical training in having a person, still young in religious life, confront his or her former secular *milieu* but now with little money, no title and in simple garb. In the area of apostolic formation, the instruction is cautionary where it could have been creative.

Finally, the document treats a sensitive area for apostolic religious, the role of the local bishops *vis-à-vis* the missions of an apostolic congregation. To get at this sensitivity it would be helpful to trace how the instruction handles the relationships between bishops and apostolic religious superiors. In Part V of the instruction which treats some specific questions around formation there is a sub-division entitled *Episcopal ministry and religious life*. Several working principles are enunciated in this section:

1. That the ministry of bishops and that of religious superiors are not in competition. Religious institutes possess an *internal* order which has its own competence to uphold and to develop religious life. But this autonomy must be exercised 'within the framework of organic ecclesial community' [94].
2. On the other hand, bishops have a responsibility 'for the doctrinal teaching of faith both in the centres where the study is promoted and in the . . . means to transmit it' [96].
3. While bishops must respect 'the autonomy of life', particularly internal government, of religious institutes, they are not dispensed from 'watching over the progress' religious make 'toward holiness' [97].
4. Concerning the apostolate, the bishop's relationship to religious institutes 'is more deeply rooted in his office as a minister of the gospel, a promoter of holiness within the church and as a guardian of the integrity of the faith' [97].

These principles reflect a model of religious life fundamentally centred on contemplation and internal community and presume this model as operative for all religious. Religious superiors are described as 'spiritual directors' [95]. Superiors, as it were, keep community life vital and recollection regular. Now for religious who call themselves *apostolic*, the apostolic charism which they possess comes to life, as it were, when they act out of the gift, when they leave community to be involved in mission. The principles emphasized in the instruction seem to place activity outside community 'under the guidance of the pope and bishops' [110].

Since the instruction itself allows that questions have been raised in the text which have not 'all received definitive response' but which will still 'provoke reflection' [110], it deems to be consonant with the

intention of the authors to contribute some reflection. Nowhere is reflection needed more, at least for apostolic religious, than in the area of apostolic initiatives. Religious have to feel that they have some voice in the living interpretation of their vocations, their emerging histories, and corporate service of the Church. These elements touch on apostolic planning, a crucial incentive for practical, Spirit-inspired direction in formation, community life and specific ministries. As I have underscored above, apostolic religious women and men have come to their respective institutes to labour for the Kingdom, not just to contemplate its significance.¹² Moreover, while no religious superior of fidelity and prudence would urge her or his membership to assume an apostolic direction independently of the bishops involved, the vast majority of religious superiors know from their history and from their own immediate experiences that to be an apostolic religious frequently puts a woman or man into professional pastoral specializations about which many bishops know little. This is not a putdown; it is the recognition of the limited apostolic-professional competency we all experience in an increasingly complex world. It is this complex world which apostolic religious have to enter. In other words, while the instruction recognizes the need for apostolic religious to have apostolic formation, it appears to place the effective implementation of such formation outside the religious institute. Apostolic religious men and women are, as it were, to be guided in their ministry by the chief custodians of the communion of the Church, the bishops. How this will work out is unclear, creating some ambiguity for those called to implement the directives.

The three structural themes which I have suggested and described—the legal-institutional, the psycho-religious developmental, and the apostolic—must be integrated by the particular charism and style of each religious institute. There may be other structural themes religious can employ. But these three strike me as basic. With the authors of the instruction one can only hope that the document will be an occasion of ‘greater authenticity . . . solidity . . . and joy for [our] mission in the world’ [110].

NOTES

¹ Schüssler Fiorenza, Elisabeth: ‘The ethics of biblical interpretation: decentering biblical scholarship’, *Journal of biblical literature*, vol 107/1 (1988), p.g.

² I am indebted to the Rev. James F. Riley, S.J., a graduate student in canon law at Catholic University, for his help in this section.

³ Morrissey, Francis G., O.M.I.: ‘Papal and curial pronouncements: their canonical significance in light of the 1983 code of canon law’, *The jurist*, vol 50 (1990), p 115.

⁴ *Ibid.*, p 116.

⁵ Au, Wilkie, S.J.: *By way of the heart, toward a holistic Christian spirituality* (New York/Mahwah, 1989), p 11.

⁶ Cf Edwards, Denis: *Human experience of God* (New York/Ramsey, 1983).

⁷ On such a reading see my 'What kind of document?', *The Way Supplement* vol 61 (Spring 1988), pp 22-24.

⁸ Buckley, Michael J., S.J.: 'Freedom, election, and self-transcendence: some reflections upon the Ignatian development of a life of ministry', in *Ignatian spirituality in a secular age*, edited by G. P. Schnier (Waterloo, 1984), p 75.

⁹ *Ibid.*

¹⁰ *The Constitutions of the Society of Jesus* (English translation and edition by George Ganss, S.J., St. Louis, 1970), [3].

¹¹ Cf the fine analysis by Lozano, John M., C.M.F.: 'The theology and spirituality of the apostolic life', in *Ministerial spirituality and religious life*, edited by John M. Lozano et al (Quezon City, 1988), pp 1-43.

¹² On the historical significance of the apostolic vocation and its neglect in present church thinking, see O'Malley, John W., S.J.: 'Priesthood, ministry and religious life: some historical and historio/graphical considerations', in *Tradition and transition, historical perspectives on Vatican II* (Wilmington, 1989), pp 127-171.