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Envisioning the Future
of Religious Life
as a Pioneer Community

CROSSROADS

The institutions and the world we live in are at a crossroads. This historical moment is redefining what it means to be in relationship with each other on a local, regional and global level. As the Internet, social media and other technologies continue to evolve; society also is redefining traditional relationships, connectivity, institutions and culture. In the process, we are being opened to the entire world on a daily basis. Each day the news and life questions are intertwined between local and global connections. While each nation tries to maintain its unique culture, the world is becoming more interconnected.

The crossroads for religious life is like that of the world. In the past three decades, religious have moved away from being the primary leaders and shapers of Catholic institutions such as healthcare, education and social services due to increased lay participation and leadership. The passing of leadership and responsibility to lay collaborators is freeing religious to reimagine their lives, capacities and presence in the world. As religious have aged, congregations have moved toward redefining who they are; what their sacred work is, and how to go about their mission given the shift in their demographics.

As one looks into the figurative crystal ball over the next ten to fifteen years, this transformative process will continue as the congregations become smaller, financial well-being shifts, and support of their elders continues to be a high priority. Religious are faced with profound questions: How will we define our lives, live our charism, and be on mission with fewer active members? In reality, they have moved into an age where the pioneer spirit once again will be the path that reignites the religious charism. The adventure will ask them to risk and to envision a future that we have not seen. Religious are becoming the new Moses or like the first followers of Jesus in Acts. They are being asked to rethink, refound and reimagine religious life in a more global and technological age. Entering this new moment will require walking the paschal mystery of both celebrating and letting go of a successful past, feeling the pain of disconnection, and being open to the surprise of the resurrection.

This means envisioning and embracing a small Pioneer community as the future that they are being called to create. Characteristics of this small Pioneer community are:

- Smaller communities committed to living and sharing the spirit of the charism
- Intergenerational and intercultural in composition
- Commitment to people on the margins, especially women and children
- Simpler and more intentional community life enriched by faith sharing and contemplation
- Interconnection by a network of relationships that are passionate and committed to the congregational charism and the gospel message
- Technological savvy

In order to create this future, congregations will need to become designers of a future that they cannot see. They will need to become designers or, as the Disney Company calls its

creators, “Imaginers.” Disney World was created through the power of collaboration, imagination, storytelling and embracing an interdisciplinary process. The direction setting enabled architects, engineers, artists, construction workers and land developers to collaborate to create a theme park. Walt Disney died before that vision was completed and thus left his work to the next generation. His brother Roy and generations of others realized Walt’s visionary direction, which has transcended Walt and has touched annually millions of lives.

This is the reality of today’s religious congregations. Religious are called to create new prototypes of religious life that in the future will be taken for granted. Though intentionally small, religious congregations can choose to be influential in the larger global reality. Religious will need to have the internal fortitude and the trust in a vision that will make sense only in its evolution rather than in its definition. It will be a spiritual pilgrimage of faith upheld by the providence of God.

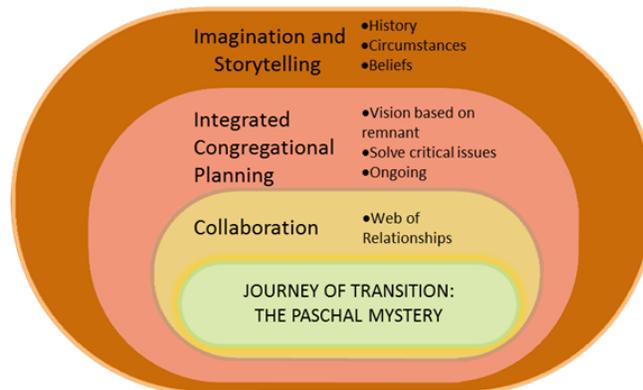
The planning challenge facing religious congregations is similar to Disney’s. The challenge is to imagine a vision that enkindles the hearts while inviting the many gifts and talents of others to achieve the dream. This collaborative model of planning and implementing is based on the creation of a pioneer vision. In reality, this is the continuous evolution and story of religious communities. We have taken for granted today’s institutions and visions from our foremothers and fathers, and God is inviting us to once again create a direction that will emerge over time.

In order to develop a prototype of a Pioneer community, general chapters, implementation of chapter initiatives, and next general chapters need to be seamless. The current planning processes are based on the general chapters being the source and summit of all planning. Significant time, energy and resources are used in preparing for them. Often the implementation is delayed, the collective energy is lost, and the initiatives become isolated activities rather than an integrated implementation plan. In order to move away from this pattern and to create a new reality, congregations need to see their decision-making and governance as continuous.

This type of planning process is based on five integrated and critical components:

- The paschal mystery with an emphasis on Holy Saturday, that liminal space where pain, grief, darkness and sorrow are experienced in order to create inner space for the resurrection
- Transition from large congregations based on an institutional ministerial model to a Pioneer community model that focuses on leveraging the web of relationships and where the very core of consecrated life is a new inter-relatedness between community life and ministry
- Contemplative imagination and storytelling that foster communal discernment
- Integrated organizational planning process, which means developing the strategic, operational and human capacity of the congregation in an organic and simultaneously way
- Collaboration among the religious congregation’s extensive web of relationships that have passion and commitment for the charism

TRANSITION



Religious today need to redefine the vision based on their charism and fewer members. The call is to let go of the past model of religious life and to enter the neutral zone. This is a time when congregations still have large numbers and yet in ten to fifteen years will have significantly fewer members, a pioneer of current members.

In order to create this evolving and changing model of religious life, religious are being asked a new set of strategic questions based on today's needs and times.

In our Christian Heritage we have a profound model of transition based on the Paschal Mystery. This spiritual path calls us to die to old models, enter a liminal time and allow the resurrection to emerge. From Good Friday to Holy Saturday to the Resurrection is a seamless journey. In many ways, this is the power of the Paschal Mystery. Jesus' death and letting go moved the disciples into Holy Saturday, the liminal space that evolved into the resurrection and a new beginning.

The chart below depicts the paschal journey that religious communities have been walking for the past three decades.

PASCHAL MYSTERY	RELIGIOUS LIFE TODAY Good Friday Letting Go	TRANSITION Holy Saturday Current Reality	PIONEER COMMUNITY Resurrection New Beginning
COMMUNITY LIFE	Institutional and small houses with regular congregational meetings	Increase of smaller communities – based on fewer sisters	Critical strategic question: How do we want to live community together?
MINISTRY	Sponsored and individual ministries	Individual ministries and letting go of traditional sponsored ministries in education, healthcare and social services Move toward being with the poor	Critical strategic question: What does it mean to be on mission?
FORMATION	Congregational Novitiate and Formation Programs	Congregational and transcending traditional Congregation Boundaries	Critical Strategic Question: What does formation look like for a pioneer community?
WORLD VIEW	Provincial/Congregational Closed System	Provincial/Congregational and if international then with those Provinces Networks as well as social media	Critical strategic question: How might religious live in an open system where social networks and collaboration go beyond traditional boundaries?
PROPERTY	Large Motherhouse Ministry constrained to brick and mortar	Letting go of Motherhouse and reconfiguring property use leads to a great deal of grieving Ministry moving to a more Virtual World with less brick and mortar	Critical strategic question: What type of facilities and property do we need for a pioneer community to be on mission?
VISIONARY DIRECTION	Communities had the resources, both financial and human, to create various directions	Diminishment and letting go of sponsored ministry, property, with a great deal of energy on sustaining congregations and healthcare Balance tension and worldviews of both Vatican II and John Paul II realities seen in Pope Francis	Critical strategic question in the next five to ten years: How do we live our charism in a global and borderless world with social issues that transcend one nation?
RELATIONSHIPS	Sponsored Ministries Associates/Oblates Advisory Groups	Letting go of sponsored ministries – struggling to find the connections	Critical Strategic Question is: How do we maximize the congregation’s extensive web of relationships for mission?

PIONEER COMMUNITY PLANNING

The planning for a Pioneer community demands a more integrated approach to envisioning the future of religious life. The model below depicts the shift in the planning process.

- The goal is to balance the needs of both the older religious needing healthcare and the mission and work of a smaller Pioneer community.
- Increase focus on younger members of the congregation and their desires for the future
- Define the capacity needed to care for the senior and move toward a more Pioneer model of community
- Facilitate the grief process of letting go of a very successful past that led to and implemented Vatican II and define religious life that is operative today.

The previous chart identifies congregation's strategic questions. The chart below describes the movement from what is to the emergent Pioneer community.

From – Current Religious Life Model	Toward – Pioneer Community
Large Community	Smaller
Life based on local geographical reality	Both local and global
Focus on core with many large institutions	Focus on core of the life based on new needs and fewer institutions
Aging members and strong focus on healthcare	Stronger intergenerational mix
Congregation or Province	Congregation/ Province/Federation/ Intercommunity focus
Individual charism	Increase collaboration and cooperation beyond individual charism
Vatican II	Post Vatican II
Closed System	Open System
Associates and Oblates	Maximize web of relationships at multiple levels including Associates, Oblates and collaborators

EMOTIONAL IMPACT

Change is never easy. It is especially more difficult when there has been success in shaping one's reality. Today's change must be radical and transformative. It is a profound and sacred journey that involves four important elements: contemplative silence, prayer, empathy for the individual and communal discernment. The development of a Pioneer community will mean entering an emotional journey of grieving and letting go so new models can emerge both with their successes and failures. Communal discernment needs to be an absolute part of this sacred journey, which calls for the integration and respect for the individual aspirations with the creation and response to a communitarian call.

Contemplative silence is important because in the personal and collective stillness people connect to their heart and deeper aspirations. This quiet allows the charism to be open in new ways and illuminates new possibilities for being on mission. In addition, in the silence the individuals and community can open their heart to the invitation of the spirit. This openness strips away the barriers that need to be taken down in order to create the space to risk the new. This path is both an individual and collective walk.

Grief and new beginnings are interconnected pieces of being open to a new vision. The entering of the deeper emotional pain of letting go and this discomfort allows for the new to emerge. This path is not for the faint of heart because it tests every fiber of the individual and collective soul living through the darkness back into life.

CONTEMPLATIVE IMAGINATION AND COMMUNAL DISCERNMENT

Contemplative Imagination and communal discernment are important ways of creating a new narrative that envisions an emerging vision from the dream phase into a conceptual reality. As Walt Disney's imaginative model was "Dream, Believe, Dare, Do," this is the communal call today to dream a new vision, believe it with passion, dare to risk its creation and in the end create the impossible.

Contemplative and Communal Planning is the call to discern the movement of God's will for these times. Struggling with dwindling resources, religious congregations need to acquire a fiery passion and belief like the early members who began the various congregations. This pioneer spirit and energy can forge a vision that in the future will be taken for granted much as their ancestors did. As stated before, this is an ongoing and organic process that demands contemplation and stillness that listen to the spirit as it advances within the religious congregation and the external world. Congregations are called to enter into contemplation to gain the internal courage to risk creating a visionary direction and set of actions based on their charism. This discernment process demands the rigors of being a pioneer venturing into the unknown and taking risks as did the early founders and foundresses of religious communities.

The significant contemplative practice of planning is to observe, use imagination, listen with an open heart, and integrate. As scripture says and what foreshadows the planning process is the experience of the reality of the “kingdom is and not yet.” Given this reality, a plan is only a collective snapshot in time that remains organic.

- **Observe:** When a congregation observes the environment and historical times, it picks up the subtle shifts and changes which enable one to respond to God’s call. For example, relationship connectivity and education are taking new forms through the use of technologies. We now are sharing and reflecting on Facebook, attending seminars through webinars and having meetings through SKYPE. The critical question becomes, how can we understand these trends and their impact on sharing one’s religious charism with others in this unfolding paradigm?
- **Imagination:** This is the ability to imagine a future that does not exist by benchmarking off existing models, testing new technology and risking the unknown in an integrated fashion. For example, the computer easily could be seen as the integration of a TV screen and typewriter keyboard that is powered by a small electric motor. A computer is innovative, creative and reimagined yet has been developed through the integration of existing tools. The integration of these elements has truly transformed the world.
- **Listen with an open heart:** This is an invitation to enter into the heart space which opens the congregation to its meaning and purpose. Groups often become blinded by their mental models, assumptions and comfort that can keep them from seeing the evolving change in the environment. An open heart allows religious to hear God calling through changing events and circumstances that calls for a transformative response. This is happening through the creative use of property and starting new ministries that support the marginalized.
- **Integration:** There are many new models being developed by religious for their property, ranging from protecting the environment to senior housing that fosters an intergenerational learning model to other collaborative models. These relationships represent partnership between congregations, healthcare, civic community and others to answer the needs of multiple stakeholders. These types of collaboration and partnership will be the norm as the direction of the Pioneer community unfolds over the next decade.

INTEGRATED ORGANIZATIONAL PLANNING

The creation of a Pioneer community will take place through an integrated organizational planning process. This process is important because we are moving from a closed system with few options to the explosion of opportunities in an open system. Stakeholders who once came to us for their spiritual and theological nourishment now are being exposed to and choosing from an array of options. For example, Nike has tailored its running shoes to the needs and wants of the individual rather than the idea that one shoe fits all. The importance of an integrated model is that it allows for the strategic, operational and structural needs to be developed and implemented simultaneously. In addition, this approach allows for the direction to be adaptable, fluid and flexible and evolve with the times. Finally, for integrated planning to be successful, there needs to be ongoing evaluation and accountability.

With our culture experiencing significant change in every discipline, the traditional planning models are often too slow and rigid to meet the pace of change. Thus, a more integrated planning approach is needed that allows the congregation to remain rooted in its charism while being flexible enough to adapt in a changing society. For example, we have moved in the past decade from email to texting to twitter. Each of these new communication tools has redefined connectivity. For a religious congregation to share its gift, it must adapt to these new realities and to the speed of change.

One of the transitional challenges for the Catholic community is moving away from an institutional model where most Catholics would come to us to recognize their evolving needs. For example, in the past, the religious congregations and dioceses established grade schools, high schools, and colleges, hospitals and social service agencies to meet the Catholic community's needs. This closed system was created because of the large cohort of Catholic immigrants coming to the United States in the 1800s. Society's prejudice toward Catholics, language barriers, and other factors led religious congregations to create a one-stop shopping model to meet the faithful. The Catholic community thus created a strong and effective Catholic subculture that took care of the spiritual and social needs of its population. The planning mental model for this era was based on the institutions having a strong Catholic identity, financially sustainable, and being supportive of the Catholic demographics. In the past three decades, this paradigm has no longer been able to meet the growing and diverse needs of the Catholic population, challenges from government regulations and new service delivery models.

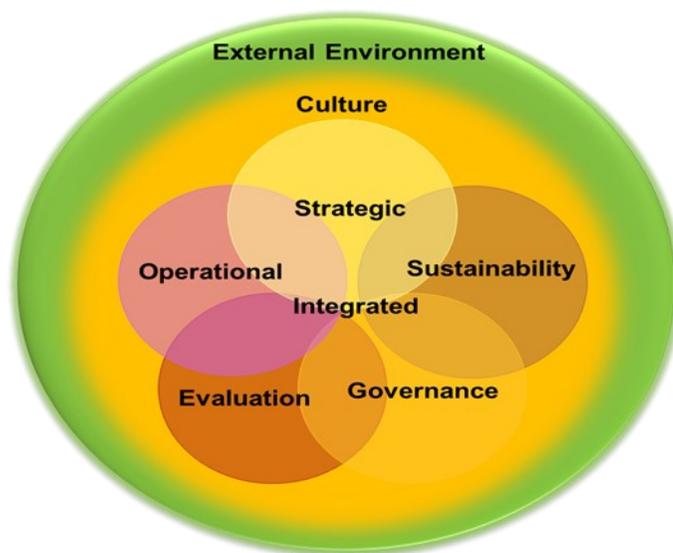
As society has become more diverse and Catholics have been exposed to other spiritual and theological approaches, they have integrated these concepts into their lives. The Catholic population became accepted in mainstream America in the 1960s with the election of John Kennedy as President. His election created an entirely new understanding of Catholicism in the United States. This historical shift along with Vatican II's call to be the "church in the world" and increasing global connectivity exposed Catholics to a wider range of cultures and spiritual disciplines. These experiences created more choices for Catholics and they began to integrate this into their faith practices.

Yet, in many ways, even though society was changing, the Catholic community kept planning from a closed system model. For a Pioneer community to be successful in the future, it needs to find ways to be rooted in one's charism while appreciating the technological evolution and societal trends over the past three decades. These changes will only escalate in the coming decades and raise new questions.

Integrated organizational planning allows for an organic process that continually holds in tension the strategic (mission, vision, values) with the operational (strategies, action steps) and builds human capacity to achieve this vision with the appropriate structures. One of the critical aspects of integrated planning is focusing on the needs of one's primary stakeholders. Their concerns and needs are important considerations in any direction setting. Because they have choices if their needs are not met, they easily can choose other options. An organic process is important because the vision and dream will happen and evolve over time based on meeting the needs of stakeholders

An integrated organizational planning process is a disciplined approach that aligns the strategic, operational, stewardship, governance and evaluation aspects of planning. To have a congregational shared vision and operational alignment, these five elements need to be seen as an integrated whole. This alignment is essential in order to maintain relevancy of the charism for these times, meet the healthcare needs of the religious and create a dream for the Pioneer community.

Integrated Planning Model



The model speaks to the various aspects that are important to hold in tension while moving toward the Pioneer community. This model is focused on three important elements -- the ability to tell the story, strong research and benchmarking to find creative alternatives and a strategic focus on the system capacity to create the direction over time.

Engaging the heart lets the congregation focus on the creation, mission, vision and values based on the needs of both the religious community and the stakeholders. For the Pioneer community, the inclusion of the stakeholders is critical because of their importance to sharing the charism with others. With fewer members, it is important to leverage the various relationships in order to share the spirituality and charism of the congregation with others. It is the web of relationships that holds the story and shares with others. When a congregation comes from its heart space, there is a power that is shaped by the charism and its contemplative imagination meets the needs of the times.

There is a need to have strong research and benchmarking in order to create strong initiatives to achieve the direction. This research needs to be based on the internal realities as well as what is happening in the external world. There is a level of due diligence in honestly assessing current reality within the congregation whether it be demographics, finances, community and spiritual life or other facets. This is crucial in order to define the current and future capacity needed to achieve the vision of creating a Pioneer community. Congregations need to have a planning process that takes into consideration the healthcare needs of their senior members, large property and sponsored ministries while creating a direction for a smaller Pioneer community. These two realities need to be held in tension.

The exploration of the external world allows us to understand the trends and how they are shaping our stakeholders' faith experience and society at large. A congregation does not live in a bubble. Rather, it continually is being impacted by and influencing the external world. Often there are embers of ideas or thoughts in society that speak to the future direction. As noted before, in one generation we have moved from email to text to twitter. Another example we have moved from SKYPE to actual meeting spaces at a distance that have all the amenities of everyone being in the same room. All of this reflection is important in creating effective and measurable strategies to implement the vision.

Finally, for any congregational plan to be successful, there need to be clear benchmarks that create the foundation for evaluation and accountability. In order to have a flexible plan that remains relevant, there needs to be strong accountability and ongoing evaluation to adapt the plans to the changing times, especially to protect the fragile Pioneer community.

As the nuclear physicist Edwin Teller says, "Survival of humanity must also include the survival of human dignity. I believe that no endeavor that is worthwhile is simple in prospect. If it is right, it will be simple in retrospect. Belief in action will accomplish that which does not exist, but which in the future will be taken for granted." This is the pioneer spirit congregations are

called to embody as together they discern and create the future of religious life based on their charism. They are being asked to plan from a model that allows them to embrace change while being rooted in their charism. This will mean letting go of the past and embracing the unknown through faith, prayer and risking that will create a future that in some distant time will be taken for granted.¹

¹David A. Ramey, *Empowering Leaders*, Sheed & Ward, Kansas City, Missouri, 1991, page14.

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