Cultivating Fertile Soil:

Formation for Canonical Governance

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A thesis submitted in total fulfilment of the

degree of

Doctor of Philosophy

School of Educational Leadership

Faculty of Education

Australian Catholic University

Date of Submission: April 23, 2012

Acknowledgements

Abstract

The fall in the number of religious staying in or joining religious life has become a significant issue for the governance of Church ministries, especially those in health, education and social welfare. Increasing numbers of lay people are becoming involved in senior management and governance responsibilities. The level of involvement of the laity had not been envisaged in the Code of Canon Law. Further the nature and importance of such roles raises the question of appropriate formation of the laity in governance informed by, and under the jurisdiction of Canon Law, i.e., canonical governance.

This study researched the formation needs of lay people to undertake canonical governance roles and sought to develop a framework which would be relevant to address their needs.

Church documents used in formation for priesthood – *Pastores Dabo Vobis* (Pope John Paul II, 1992) and ecclesial lay workers – *Co-Workers in the Vineyard of the Lord* (United States Conference of Catholic Bishops, 2005) provided the basis for identifying areas of need for formation of canonical governors as well as for developing a framework applicable to this new field of endeavour in the Church.

A constructivist paradigm was chosen as the epistemological basis for the research and an interpretivist perspective was adopted. A survey was designed nominating traits as qualities for canonical governors. These traits were drawn from the areas identified in the core documents. The survey items invited respondents to nominate agreement or otherwise on a Likert-type scale on the desirability of the traits for canonical governors and whether they perceived the traits in evidence currently. The survey was administered on-line and offered to people with expertise in the field. Responses came from seven countries, the majority from Australia and the USA.

A selection of survey item results was then used with interviewees with expertise in canonical governance for their insights on the traits in the light of the survey responses.

The survey findings strongly supported the desirable traits but did not as strongly report that the traits were currently seen in action. The structure of the survey also provided support for developing a framework for formation of canonical governors.

The findings from the interviews also strongly supported the nominated traits as desired and expressed concern at the discrepancy in the survey responses between the desired and perceived enactment of the traits. There was concern at the perceived lack of understanding by those with canonical governance responsibilities of ecclesiology, missiology and Canon

Law; and how these elements are connected to canonical governance and the nature of Church ministries in which they are involved.

On the basis of the findings from the survey and the interviews a framework for formation for canonical governance is proposed. This framework draws from Vatican II documents for formation – *Optatam Totius* (Abbott, 1966f) on priestly formation and *Apostolicam Actuositatem* (Abbott, 1966b) on lay formation and where formally nominated in the core documents: *Pastores Dabo Vobis* and *Co-Workers in the Vineyard of the Lord*.

Findings from this study indicate that there is an urgent need for a formation framework for canonical governance to be articulated and understood by Bishops, leaders of Religious Institutes, formators and canonical governors, present and future. The recommendations from this study are that:

1. the scope of formation for canonical governance needs should be broad and clearly defined. The four dimensions of formation need: human, intellectual, pastoral and spiritual provide a basis for identifying these areas of need.

2. A framework for formation for canonical governance should have the following components: a recognized and valid base in ecclesial literature and related Church teaching, a means of identifying formation needs, and principles to underpin the collection and analysis of data about formation needs and how the results of such analysis are used.

Table of Contents

List of Tables

List of Figures

Glossary

Baptism: "The sacrament of rebirth by which one becomes a member of the Church and a new creature in Christ" (McBrien, 1994, p. 1234).

Bishop: A cleric appointed by the Roman Catholic Pope to lead a diocese in the Church. The Bishop is responsible for the governance and spiritual life of the faithful in the diocese. Bishops are the link to the first apostles commissioned by Jesus Christ to lead the Church from the period called "Apostolic Times" (Roman Catholic Church, 1983, Code of Canon Law: Cns 375, 376).

Code of Canon Law: The promulgated law (1983) of the Roman Catholic Church for the good order of the operation of the Church (Latin Rite) to assist it to achieve the mission of the founder, Jesus Christ (see Coriden, 2004).

Canonist: A person who has undertaken studies in the law of the Roman Catholic Church – Canon Law – and is qualified to offer advice on the law (Coriden, 2000).

Canonical Governance: The carrying of the responsibility of the ministry in the light of Code of Canon Law of the Roman Catholic Church.

Canonical Governor: A person given responsibility in accordance with Canon Law to maintain the requirements of a ministry, theologically and canonically, for the mission of the Church.

CHAUSA: Catholic Health Association of the United States of America

CICLSAL: Congregation for Institutes of Consecrated Life and Societies of Apostolic Life. The official body in the Vatican bureaucracy responsible for the oversight and approval of Religious Institutes and newly created Public Juridic Persons for the governance of ministries (The Congregation for Institutes of Consecrated Life and Societies of Apostolic Life).

Congregation Leaders: People appointed as leaders of Religious Institutes under Canon Law (Roman Catholic Church, 1983, Cns 617-630). The terms "Congregation", "Religious Insitute" and "Religious Order" are used varingly by different interviewees. The researcher sought to be consistent with "Religious Institute".

Ecclesiology: The branch of Theology that studies the Church, its meaning and operations (see McBrien, 1994, p. 1238).

Formator: One who undertakes to prepare others for the responsibilities of a future task – in this case, preparation of another for the responsibilities of canonical governance.

Governance: The role of responsibility for and stewardship of the purpose and meaning of an organisation in the light of the relevant law (canonical or civil) and the expounded mission of the organisation (see Chait, Ryan, & Taylor, 2005, p. 3).

Lay People or Laity: People who have a membership of Christian life because they have been baptised. This means all Christians, including clerics; lay people are usually described as the members of the faithful have not been ordained to the ministerial authority of priesthood (See Hahnenberg, 2003, pp. 12-18).

Members of Religious Institutes: People who have joined a Religious Institute and live their life in accordance with the rule of that Institute. They may be clerics or lay.

Ministry: "The public activity of a baptized follower of Jesus Christ flowing from the Spirit's charism and an individual personality on behalf of the Christian community to proclaim, serve, and realize the kingdom of God" (O'Meara, 1999, p. 150).

Mission: The purpose for which an organisation exists. In this study mission "is proclaiming, serving, and witnessing to God's reign of love, salvation, and justice" (Schroeder, 2008, p. 3).

Missiology: The branch of Theology which studies how mission is understood and enacted. Also called Theology of Mission (Bevans & Gros, 2009).

Moral Person: An entity which comes into existence without any legislator (Morrisey, 2009).

Priest: A man (in the Roman Catholic Church) ordained and empowered to lead the religious rites of the Church. The role has been a basic requirement for governance over several hundred years (Roman Catholic Church, 1983, Cns 273-289). Bishops, priests and deacons are defined as 'clerics'.

Public Juridic Person: An entity which is created by a legislator. Canon Law gives the juridic person status to the entity in the Church in the same manner that corporation law allows for such entities in civil law. In the Catholic Church, the person's goods are deemed to be owned by the Church (Morrisey, 2009, p. 18). It is identified by the abbreviation PJP.

Religious Institute: A body which has been approved by the Church to allow for "the Consecrated and Apostolic Life" (Coriden, 2004, pp. 99-106). The members who voluntarily join the Religious Institute usually live a life in common, take vows, and engage in ministries in the name of the Church.

Sponsorship: "The formal relationship between a recognised Catholic organisation and a legally formed entity, entered into for the sake of promoting and sustaining the church's mission in the world" (Rosemary Smith, Warren Brown, and Reynolds, 2006, p. ii Foreword). However, it is also seen as "an evolving concept" (CHAUSA, 2007b, p. 6). The term is particularly used in Catholic Healthcare governance in the USA. For the purposes of this research, the term was avoided and 'canonical governance' was consistently used.

Stewardship: Acknowledgement that resources are held and administered in sacred trust (Grant & Vandenberg, 1998, p. 122).

Theologian: For the purposes of this explanation a theologian is described as "a scholar, an academic, a highly trained specialist with a wide knowledge of Christian tradition and the history of doctrine and with a number of linguistic and hermeneutical skills" (Bevans, 2002, p. 18). However, it is recognised that theology is a study of the search for God. Bevans then suggests that the trained professionals serve an auxiliary role for ordinary people in their search for meaning in life.

Theology: The ordered effort to understand, interpret, and systemize our experience of God and of Christian faith. It is "faith seeking understanding" (Anselm)" (McBrien, 1994).

Second Vatican Council or Vatican II: The Council of the Catholic Bishops of the world held between 1962 and 1965 which addressed issues for the Church and provided 16 major documents for change and development for the future of the Church.

Vatican City: An independent nation, headquarters of the Roman Catholic Church.

All Scripture quotations are from *The New American Bible with Revised New Testament (Confraternity of Christian Doctrine, 1988).*

Chapter 1   Introduction

1.1   Introduction

The purpose of this research is to investigate the formation needs for people to become members of the Public Juridic Persons in the Catholic Church so that they understand the responsibilities in the role as canonical governors for the mission of the Church in the 21st century.

This formation is now a need because of complex changes in the Church, in the civil world, and in the relationship between the Church and the civil world over the past 60 years.

The research is based on the assumption that the Catholic Church has a responsibility to carry out the mission given by its founder, Jesus Christ, to be a messenger of God's love in the world and, in exercising this responsibility, people are believers in the Christian message.

1.2   Background to the Research

The event which gave articulation to changes for the Church flowed from the writings of the Church leaders gathered at the Second Vatican Council (1962-1965). This Council, to which all Catholic Bishops were invited, was called by Pope John XXIII to renew the Church.

From the Council came pronouncements which called for a change in how the Church saw itself, looking with a different ecclesiology, and how it interacted with the world. In making this call, the Bishops were not casting out what was believed even though, to some, it seemed as though all they had been brought up believing was discarded. The Bishops were proclaiming a preference for an alternative ecclesiology from what was the current predominant way of seeing the Church (Bevans & Schroeder, 2004; Cunningham, 1986).

The Council re-examined the traditions of the Church and discerned an over emphasis in the way the Christian message was being interpreted for living to the exclusion of other ancient legitimate ways (Bevans & Schroeder, 2004). The Bishops called for a new approach to how the Church proclaimed the good news of Jesus Christ in a way that was more appropriate to the current times (Kirkwood, 2012b).

The results of the Bishops' call for change were tumultuous (Arbuckle, 1993, pp. 36-63). What was proclaimed by the Council had little preparation for being heard by people in the Church, whether they be members of the clergy or the laity. In particular, there was scant attention given to planned systems for formation of ministers to implement the changes (Confoy, 2008; Schuth, 1999). The consequences have taken decades to come to light and

have been intensified by changes which have taken place in the secular world, including the raising of the education level of the people in the Church (which has seen an increase in questioning of doctrines and procedures), and the increasing complexity of living evidenced by science enabling life to be extended through medical development, computers revolutionising communications, and globalisation changing markets and means and forms of production (Cleary, 2007).

In a concomitant to these changes, the last thirty years of the twentieth century saw a huge decline in the number of priests and religious in western countries through departures from 'religious life' (Reid, Dixon, & Connolly, 2010) and a dramatic fall in the numbers coming forward to join. The religious had conducted ministries in health, education and welfare which were for the good of people and a significant element of evangelisation, the spreading of the good news of Jesus Christ (Grant & Vandenberg, 1998). The Church had established governance structures to enable these religious, operating in established Religious Institutes, to conduct the ministries in the name of the Church. However, the fall in the number of religious, the aging of their members and the increased complexity of the professionalism and administration of the ministries, has seen lay people increasingly undertake leadership and managerial roles in the ministries (Kirkwood, 2012b).

The responsibility for governance of the ministries, both canonically and civilly, remained with the Religious Institutes. In the last twenty years, the capacity of the Religious Institutes to fulfil responsibilities in this area has fallen and seen the creation of new entities with lay people undertaking greater responsibility for governance (Austin, 2011; Grant & Vandenberg, 1998; Schweickert, 2002).

Canonical governance is stewardship of the Church's resources for mission (see Grant & Vandenberg, 1998, p. 122). In the eyes and mind of Church leaders for centuries, governance belonged to those "in sacred orders" (Canon 129#1). This has traditionally meant priests and Bishops, not the laity (Rinere, 2003). Canon lawyers have been debating the meaning of the phrasing in the Code in Canon 129#2 – "lay members of Christ's faithful can cooperate in the exercise of this same power in accordance with the law", and how broadly this canon might be interpreted (Beal, 1995; Coriden, 2000; Di Pietro, Undated; Huels, 2000; Sweeney, 2005). As these debates continue, lay persons are increasingly being thrust into canonical governance roles with significant stewardship responsibilities. Leaders of Religious Institutes are seeking to ensure that the ministries for which they have responsibility have governance 'handed over' appropriately in order that such ministries continue to serve the mission of the Church (Grant & Vandenberg, 1998; Gray, 2005).

The leaders of Religious Institutes have had their canonical power of governance in the Institute recognised in Canon 596#3. However there is uncertainty in how this authority can be passed from their responsibility to new entities – Public Juridic Persons, a term for corporate existence in the Roman Catholic Church under Canon Law (See Morrisey, 2009, p. 17) which have lay people accountable under 129#2. A key complication in dealing with this issue is that the understanding of 'governance' in the Church is changing as the Church encounters this new context (Wood, 2009). Along with these changes, the formation needs for those newly called to canonical governance are yet to be appropriately identified and planned for (Cleary, 2009; Morrisey, 2002; Sweeney, 2005).

These circumstances call for a "renewed understanding of what constitutes ecclesial ministry and new manifestations of ministerial grace appropriate to our time" (CHAUSA, 2005b, p. 25). This means that the Church needs to adapt from what was taken for granted as the traditional domains and roles of priests and religious in canonical governance, to the growing leadership role of the laity (Arbuckle, 1995; Fox, 2005a, 2010b; Hahnenberg, 2003; Kirkwood, 2012a, 2012b; Lakeland, 2007; Morrisey, 2002, 2011; Ranson, 2006; Wood, 2003). This latter role is understood as "a specific affirmation of the vocation all Christians share to witness to the Gospel by deeds of love and service in the world and within the Church" (CHAUSA, 2005b, p. 25)

Important aspects of addressing this question are the perceptions of stakeholders regarding programs of formation and the issues and challenges associated with such programs. The stakeholders include the Bishops in whose dioceses the ministries operate, given their canonical responsibility for all ministries in their diocese (Canons 678; 790), the Religious Institutes who have been stewards of the ministries (P. Smith, 2006a), and the whole Church for whom the ministries are expressions of the mission of bringing the good news of God's love to all people (Bevans, 2009; Karam, 2008; Morrisey, 2002).

The framing and emphases of the major research question for this study emerged from the researcher's personal history and vocation. I am a member of the Congregation of Christian Brothers, a Religious Institute in the Catholic Church. I have been an educator for some forty years as teacher in primary and secondary schools, subject coordinator, sports master, year coordinator, principal for seventeen years, and a consultant in a diocesan schools office. Over the last ten years, I have been involved with civil and canonical governance development for the Congregation in New South Wales and on a National Planning Committee for Schools Governance for the future governance of Christian Brothers' schools in Australia.

This has involved a developing appreciation of the complexities and strengths of the Code of Canon Law in its role of assisting the mission of the Church through the ministerial work of many Religious Institutes and the change in governance of the ministries of Religious Institutes is the focus and limit of this research. I found myself delving not just into Canon Law, but also into missiology, ecclesiology, history and the governance of the Roman Catholic Church. The weaving of these disciplines provides the rich texture for the commitment in faith to the mission for which the Church was established by its Founder, Jesus Christ. This has led me to consider the formation needs for people involved in the future governance of the ministries in the Church. It is appropriate to call this "the ministry of governance" (Mallett, 1986).

1.3 Research Problem and Research Questions

The research problem is that there is a lack of clarity and definition regarding the role of people to undertake the responsibilities in the role in the ministry of governance in the newly formed Public Juridic Persons and a lack of understanding of how such individuals can be formed.

The purpose of the research is to assist those with responsibility for the canonical governance to come to a deeper understanding of the need for formation and the means by which such formation might be achieved.

Consequently in light of the changing context in the Church – and especially those changes and issues relating to canonical governance described above, the major research questions for this study are:

- What are the needs in forming individuals for canonical governance in Public Juridic Persons?

- What is an appropriate framework for formation for canonical governance on the basis of these identified needs?

1.4 Justification for the Research

The research addressed an emerging need in the Catholic Church regarding the formation of people for the ministry of canonical governance. The specific interest groups were Bishops, leaders of Religious Institutes, canonists, theologians, formators and lay people involved in the newly forming Public Juridic Persons. This research dealt with governance formation in the Church where governance is seen as a ministry, not just a matter of authority

(Cunningham, 1986; Willis, 1986). This study aimed to provide material for developing the understanding of the practitioners working in the fields of canonical governance and Church ministries especially those in the areas of health and education: whether these people are looking to hand over ministries, reflecting on how to respond to an invitation to undertake a governance role, or are in senior management positions and require a more detailed understanding of the canonical responsibilities of those to whom they answer.

The newness of the area was highlighted by Morrisey (May 3, 2007b) at the Congress on Catholic Health Care at Vatican City:

> For me, the key to the success of the PJP lies in the quality of its leadership. Therefore, it must become a major priority to see that a worthwhile formation programme for leadership is established and put in place, or that a good existing one is used. This can take different forms, but what counts is that it be adapted to the local situation, while keeping in mind broader Church issues. (p. 16)

Placing priority on understanding new governance arrangements and associated formation requirements is necessary to address the emerging challenges from the changes outlined in the context above and, if not addressed, could see key Church organisations in health and education lose the Catholic identity and the resources for mission.

The significance of this research was highlighted in response to a paper that the researcher presented exploring some elements of the research at the National Conference of Catholic Health Australia, held in August 2009 (Thornber, 2009). The paper was entitled "Catholic Governance – Carrying Leadership Forward". The 150 participants included 3 Australian Bishops, The President of Catholic Healthcare Association of the United States of America, several members of Trustees of Australian PJPs and intending PJPs, Board members and Chief Executive Officers of same. The feedback and follow on enquiries indicated that the questions raised were just appearing on the horizon for some people involved in these issues concerning development in the Catholic Church.

1.5   Methodology

A constructivist paradigm was chosen for this research. In this paradigm, Cleary (2007, p. 104) explained that "realities are understood to be in the form of multiple, intangible mental constructions, socially and experientially based, local and specific in nature and dependent for their form and content on the individual persons or groups holding the constructions" (2007, p. 104). She noted that, in the constructivist paradigm, "the investigator and the investigated are interactively linked so that the 'findings' are literally created as the investigation

proceeds" (2007, p. 104). This was borne out in the research when, in the second stage of the data gathering, interviewees reflected on the survey data and these reflections yielded further insights.

The interpretivist theoretical perspective comprises a range of elements. Cleary (2007) examined the difficulty of researching religious organisations and created a theoretical framework for analysing religious organisations. Interpretivism acknowledges that culturally derived and historically situated interpretations can alter. This research examined the impact of a change in culture and world view at a particular time in history. In particular, the study researched the formation needs for people in the leadership of that change and in the leadership role in canonical governance. These needs have changed over the past 30 years. The study interpreted the responses of knowledgeable and informed people in the field about what they were seeing and what they saw as desirable. This was then interpreted from the survey data and interview data.

As this study addressed new situations in the Catholic Church from changes in the Church itself and the interaction of the Church with the post-modern world, particularly flowing from the second half of the 20th century, the interpretive perspective was deemed to be appropriate.

Case study is a research strategy which focuses on understanding the dynamics present within single settings (Eisenhardt, 1989, p. 534) but allows for multiple sites or cases to collect data for the setting. The multiple site design can normally be expected to be "more powerful and provide more insights" (de Vaus, 2002, p. 227).

For data gathering, a survey was designed to create items to test whether nominated traits were regarded as important for canonical governors and whether the traits were in evidence.

The survey allowed the researcher to send the questionnaire to more than 100 participants and increased the likelihood of an adequate return rate. This in turn assisted in the development of an appropriate questionnaire for the second stage of the data collection, which was the one-on-one interview.

A significant delimitation has been to keep the research dealing with the responsibilities which flow from canonical governance of the ministries. In many situations, but not all, the people involved also have civil responsibilities for the operation of the ministries. There has been no effort to analyse the formation needs for the civil aspects of the role. The research involved theology and an understanding of Church. While the research used relevant models of theology and Church, the scope excluded evaluations of the models as the emphasis was on

formation needs for people to understand whether theology and Church were relevant. The same delimit applied to the use and interpretation of Canon Law.

1.6   Outline of the Study

This introductory chapter is followed by a literature review. The review firstly explores the literature relating to the changing context which has been the cause for the research and then explores the literature regarding formation for other Church roles and their relevance for a framework for the research topic of formation for canonical governors.

Chapter 3 deals with the research design and methodology which was used for the study. Chapter 4 reports the quantitative findings while Chapters 5 and 6 report the qualitative findings integrating the responses of interviewees. Chapter 5 deals with the human and spiritual aspects and Chapter 6 with the intellectual and pastoral aspects of the formation needs and framework. Chapter 7 presents the research findings and Chapter 8 explores the implications, conclusions and recommendations for further research.

This chapter has given an overview of the study. The research problem of formation needs for canonical governors has been introduced and research questions which flowed from the problem have been set up. The justification for the research in the light of the complex changes in the Church and civil society has been provided, definitions have been presented and the methodology has been described. The study has been outlined and the delimiters noted.

Chapter 2 – Literature Review

2.1 Introduction

The purpose of this research was to identify the formation needs of potential members of the bodies of Public Juridic Persons responsible for the canonical governance of Catholic Church ministries. The term Public Juridic Person referred to the corporate status given to a body created under the Code of Canon Law, to enable the organisation to act in the Church. It is, in effect, church language equivalent to civil law that allows for the creation of companies which are, in reality, juridic persons under a relevant companies' legislation and have the right to act, buy, sell, sue and be sued. Natural persons are the canonical leaders and stewards either by being members or representatives of members if the creation of the Juridic Person allows only Juridic Persons to be members (Austin, 2011; Morrisey, 2009, pp. 17-28).

Public Juridic Persons are phenomena which have been developing in the Church over the past twenty five years since the introduction of the category in the revised Code of Canon Law in 1983. As leaders who are involved in the creation of Public Juridic Persons grappled with the requirements of their form and operation, the formation needs of the people to lead the new entities and take responsibility for them do not seem to have been the subject of research (Austin, 2011).

Research into the area required an approach which engaged several disciplines including sociology, theology, ecclesiology, missiology, canonical governance, leadership, law, history and cultural change. There was the need to examine existing governance systems in the Church and identify what significant elements needed to be incorporated into the new governance leadership. There was also the need to determine what will come from new ways of creating the leadership of the ministries with the involvement of people formed in lay spirituality rather than years of formal preparation in religious spirituality (Fox, 2010b; Oakley & Russett, 2004; Wood, 2003).

Some programs have been developed in the United States of America and Australia for the formation of lay leaders in ministry, but the general focus of these programs has been for senior management and sometimes board members. There are a few known formation programs for the senior role of membership of the body which holds the canonical authority and responsibility, whose task is to ensure and promote the mission for which the organisation has been created in the Church. Often, the same people will hold the civil responsibility as well, but that area is not a matter for this research. Over the period of the research (2008 –

2011) there were an increasing number of programs created addressing formation for senior leadership in USA and Australia.

This research sought to articulate essential elements for a formation program for leaders and potential leaders and proposed a framework for formation for those lay people undertaking the canonical responsibilities of governance.

The Literature Review was arranged to show the changes in the Catholic Church and society which led to the creation of new forms and organisations for ministry, including the establishment of the legal notion of a Juridic Person as a relatively new phenomenon as the Church itself underwent radical changes:

- The Changes in the Church and the world 1960 – 1990;
- The Changing Role of Religious Institutes – theologically, sociologically, ministerially;
- Changes in Theological approaches;
- The Changing Role of Laity in the Church;
- The Formation Needs of Laity for New Roles in Governance.

An exploration of this historical development was important to provide the context for the changes that have taken place and the range of societal factors which have played a part in the issues in the governance of Church ministries for the past 30 years and the increasing need for adaptation in the coming 20 years.

Sections 2.2 to 2.5 provide the context for the investigation of the nature of formation and the nature of formation needs. The remainder of the chapter overviews the literature related to formation, formation needs and governance on the basis of that context.

2.2   Changes in the Church 1960 – 1990 in Theology and Ministerial Practice

Regarding changes within the Church, areas examined included governance, leadership and spirituality, comparing what was happening in the late twentieth century with new needs. The purpose of this study was to consider the formation needs that might be identified for canonical governance and a framework which might underpin the formation to meet those needs.

2.2.1   Vatican Council II

The major literature from the 1960s to influence the changes in the Church came from the Documents of Vatican Council II.

Pope John XXIII, (as cited in Alberigo & Komonchak, 1995) within ninety days of his election as Pope in 1958, announced to a group of Cardinals his intention of calling a council of all the Bishops of the world "motivated 'solely by a concern for the good of souls and in order that the new pontificate may come to grips, in a clear and well-defined way, with the spiritual needs of the present time'" (p. 1). This became the Second Vatican Council, or Vatican II.

In his *Opening Speech to the Vatican II Council*, the Pope spoke of the role of the Council in strengthening the Church so that "she will look to the future without fear. In fact, by bringing herself up to date where required, and by the wise organization of mutual co-operation, the Church will make men, families, and peoples really turn their minds to heavenly things" (Pope John XXIII, 1962).

The outcomes of the Council had far reaching effects in the Church as they challenged and affirmed the Catholic faithful. However, the outcomes of the Council interacted with the changes in attitude going on in the secular world and the interaction of these two led to changes which were unimagined in 1965, but now provide the basis for this research.

For the purposes of this study, several documents of the Council were significant in the literature. They include *Lumen Gentium* (Abbott, 1966e), on the nature of the Church, *Perfectae Caritatis* (Abbott, 1966g), on the renewal of religious life, *Apostolicam Actuositatem* (Abbott, 1966b) on the apostolate and role of the laity in the Church, *Optatam Totius* (Abbott, 1966f) on priestly formation, *Ad Gentes* (Abbott, 1966a) on the missionary activity of the Church and *Gaudium et Spes* (Abbott, 1966d) on the role of the Church in the modern world.

These documents looked at the Church in a fresh manner in the light of its long story, looking past the practices and approaches which had accrued over the past few centuries. This resulted in examinations of the theological underpinnings of practices and the practices themselves which often led to a jettisoning of approaches that had been used for centuries.

Figure 2.1 indicates the historical timeline of the events and the relationship of the Vatican documents relevant to this research with regard to the timing of their development and release. In *Lumen Gentium*, the Bishops overviewed all the major topics they wished to address and the following year published documents expanding on the particular elements they had addressed.
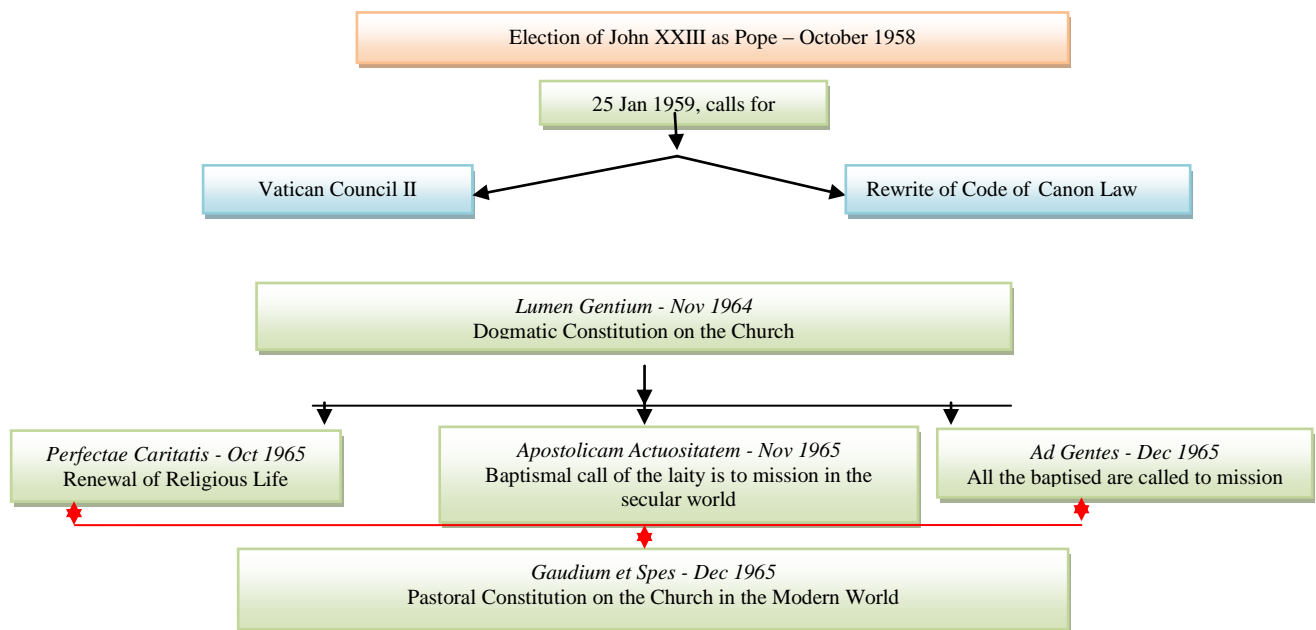
Figure 2.1   Historical Context for the Study of Canonical Governance – 1

2.2.2   Culture and Social Forces

One of the major changes at Vatican II in addressing the place of the Church in the world was the recognition in its final document *Gaudium et Spes* (The Church in the World) that culture was a relevant factor in coming to terms with the world. The accepted philosophical approach for centuries, particularly in dealing with modernism, had been one that assumed that everything was stable. It was "defensive, deductive, neo-scholastic and ahistorical" (Gallagher, 2003, p. 41). Arbuckle (1993) pointed out that the neo-scholasticism which provided a very coherent intellectual framework had one serious disadvantage in that "it was so self-contained that its supports saw no need to listen to, and learn from, other philosophies" (p. 23).

In moving away from a total dependence on neo-scholastic philosophy, the Church recognised modernism or modernity. Toulmin's characteristics of modernity (as cited in Brueggemann, 1993, p. 4) describe it as an approach which identified "the kinds of knowledge that qualify as real knowledge in the horizon of this moment called modernity" (p. 5). He identified the characteristics as a move from oral to *written*, so that what is reliable is what is written; a move from the particular to the *universal*, so that real truth is what is true everywhere; a move from local to *general*, so that real truth had to be the same from locale to locale; and a move from the timely to the *timeless*, so that the real is the unchanging (p. 5).

This description of modernity fitted an approach that the Church had actually adopted and lived in with regard to universality, truth and timeless truths. However, the growing life of modernity had been created outside the framework of the authority of the Church, and

ecclesiastical claims about what could be regarded as true and universal held diminishing sway in the Age of Enlightenment. The scientific, geographical, industrial developments from the sixteenth century onwards did not fit the world view which the Church had continued to proclaim into the twentieth century (Gallagher, 2003).

These proclamations in the documents of Vatican II came at a time when modernism itself was coming to an end as a way of seeing the world, at least in the Western cultures (Gallagher, p. 96). Geertz (cited in Arbuckle, 1993) defined culture as "a pervasive 'pattern of meanings embodied in symbols, a system of … conceptions expressed in symbolic forms by means of which [people] communicate, perpetuate, and develop … attitudes toward life'" (p. 37). Thus, matters such as Mass in Latin, practices such as "fish on Fridays", Lenten fasts and sodalities all gave meaning to the culture in the Catholic Church as defined and the Council call for liturgy in the vernacular disturbed the symbolic forms of communication.

The clash of the cultures in Church leadership and thinking came to a dramatic head in the Vatican Council on the vote as to whether the role of Mary, the Mother of God, would be dealt with in *Lumen Gentium* describing Mary's role in the Church, or in a separate document expounding the role that had grown up in Mariology which placed Mary in a significant role in salvation as Medaitrix of all graces. From the closest vote in the Council – 1,114 to 1074 – in favour of incorporating marian teaching into the schema, "commentators…note that, seen theologically, the mentality of non-historical, authoritarian orthodoxy accompanied by a piety that focused on the world to come was outvoted by the forces for renewal that called the church to enter into history and engage the social and political implications of the gospel" (E. Johnson, 2003, p. 127). Twelve months later, the final document was passed with five voting against it (p. 128). This graphic example of the call for change, and the tension in having a new vision accepted, highlighted the difficulty of any call for cultural change in the Church.

This narrative can be applied to questions of formation and formation needs about the nature of the content, and the processes to be used and the nature of negotiation about needs of formation for canonical governance.

2.2.3   Catholic Identity

The changes in theological and cultural outlook from the Vatican Council impacted on the established Catholic identity in a manner that caused turmoil for Catholics across the range from those who looked for change and tried to enact it in their lives and communities, to those who sought to maintain the structures and practices of the past (Leckey, 2006, p. 37). Anthropologist Arbuckle (1993) described the period as one of chaos and, culturally, an

'inevitable experience" (pp. 36-63). The Council had proclaimed change, but there was no formation plan in place to enact the changes. Seminaries were still forming priests under the pre Vatican model, with no instruction on how to change or what to change to (Confoy, 2008; Schuth, 1999). Thus, what people took for granted in culture that formed Catholic identity "crashed in the late 1960s and early 1970s beyond anything that could have ever been imagined back in 1961" (Arbuckle, 1993, p. 36).

This change in proclaimed focus, displayed by the changing practices in the liturgy and piety, led to confusion in theology, religious life, parish life and teaching (Arbuckle, 2010; Gallin, 2000). The certainty of what it meant to be Catholic, defined by practices, was either lost or taken away. Church leaders were still using an authoritarian approach, but from the late sixties, many of the laity and lower clergy were not listening (Greeley, 2004, p. 82). Their more extensive education and the questioning approach of that education saw them more openly defiant of the authority and capable of articulating their own claims. Theologically and spiritually, there was a move from an emphasis on transcendence to immanence in the ensuing search for holiness – which is the purpose of the identity – in the here and now (Taylor, 1999). For Lennan (2005) "Holiness expresses the life of grace, the life of God within us. That life, which the tradition associates most directly with the Holy Spirit, is a gift from God" (Lennan, p. 401). The task of bringing the message of the Kingdom of God into the world was about to deal more fully with the incarnation of Jesus, moving away from the promise of a transcendent future life. That task would also influence how 'holiness' would be described and seen.

Putney (2008) explored the meaning of Catholic identity for the sake of the mission in a post-modern world and noted that the question "is a far more complex and profound question than is sometimes realised" (p. 1). He stated that Catholics, along with other Christians in dialogue, were rediscovering "the heart of their identity, which is Jesus Christ and the unique and universal salvation that he achieved for the world, and also to rediscover, through him, that God is triune, Father, Son and Holy Spirit" (p. 28). However, he noted that identity is hard to define as it does not depend on one single insight into theology and relationships with God (p. 16).

Gallin (2000) researched the meaning of Catholic identity in the journey of Catholic universities in the USA from the mid-20th century. Arbuckle (2007a) investigated Catholic identity for Catholic healthcare in the Australian Church.

2.2.4 Postmodern Influences

While Vatican II acknowledged that the world had changed and the Church needed to change to engage the world for the sake of mission, the world was changing from what the Church thought it needed to engage (Gallagher, 2003). The emerging new way has been given the title of "Postmodernism" because it has reversed the view of the world of the Enlightenment and modernity.

The implications for canonical governance and formation were that, in moving from universal to local, formation needed to be flexible to build in the needs of local communities and their understanding of Catholic identity. This reflected the Vatican Council call to 'discern the signs of the times'.

Thus, Toulmin's model, as described by Brueggemann (1993, p. 6) moves back from written to oral, universal to particular, general to local, and timeless to timely. Brueggemann claimed that, in a postmodern world, our knowledge is now characterized by contextualisation, localization and pluralism (p. 8). Arbuckle (2007b) highlighted this, proffering "The Good Samaritan" parable as the essential model for Catholic identity in the ministry of health care .

This is significant for formation for canonical governance because people undertaking the role need to understand the responsibility to reflect from the tradition of the Church on the freedom to read the signs of the times and act accordingly as was called for in *Gaudium et Spes* (Abbott, 1966a, 4)

The approach in moving away from certainty to questioning the sources led to the re-reading of the core Christian biblical texts and looking at them in context rather than as universals. This saw the development of Narrative Theology as an approach to interpreting the Scriptures (Brueggemann, 1997, pp. 1-114). The questions are asked as to why the story was remembered? Who was the audience? Why was it written and re-interpreted? This seeking of the meaning of the ancient documents in their context fitted well with the call to interpret them in the present context. This was seen as a positive result from the postmodernist development.

The implications for formation for canonical governance are that the questions asked in scripture interpretation are relevant for the narrative of the ministries, their relationship to Church, the understanding of the current audiences and their needs and the capacity to read the signs of the times in the light of the history.

Figure 2.2 offers a diagram of the historical journey of the Church's outreach to the world through *Gaudium et Spes* and the interaction with the changing world in the second half of the 20th century.
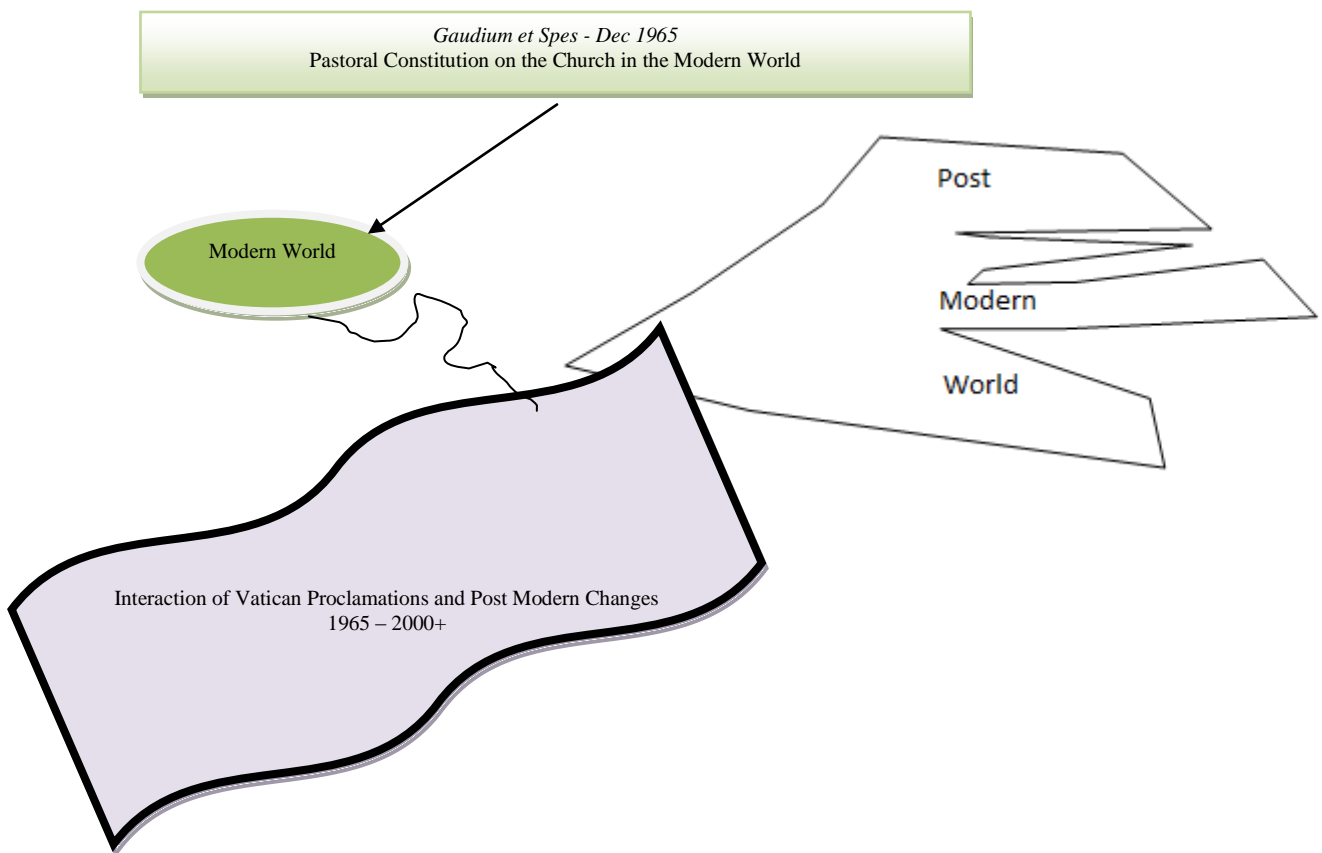
Figure 2.2   Historical Context for the Study of Canonical Governance – 2

2.3   The Changing Role of Religious Institutes

In the period under discussion, major changes occurred in the life of Religious Institutes in the Church. Some of the influences are now examined.

2.3.1   Vatican Council II

Following the call for change for religious in the context of the whole Church and the Modern World in Chapter 6 of *Lumen Gentium*, the Bishops of Vatican II went on to explore more fully these principles and changes in *Perfectae Caritatis*. Here, they outlined two key concepts for change in section 2. The religious needed to be involved in a process of *renewal* – "a continuous return to the sources of all Christian life and to the original inspiration behind a given community". The religious also needed to *adapt* – "an adjustment of the community to the changed conditions of the times" (Abbott, 1966g, p. 168).

Perfectae Caritatis was directive over a wide range of matters which were seen as needing to be addressed including governance, manner of living and praying, preparation for ministry and dress (Confoy, 2008). These were calls for far reaching change, and, as with all other areas of the Council's calls, the religious were ill prepared for implementing the change (Confoy, 2008). Combined with the revolutionary cultural changes occurring in the western world, "many religious and their communities went into a state of cultural malaise, confusion or anomie – or what is popularly called culture shock. This triggered off the movement in which thousands withdrew from religious life and the priesthood" (Arbuckle, 1987, p. 3). As well as the withdrawal of the religious, there was a very significant decline in the number seeking to join religious communities. The call for change had consequences far beyond what had been envisaged and in very different directions (See Reid et al., 2010). This research explored one of those different directions in the shape of the resultant call for lay people to undertake the governance of the ministries which the religious had built up in the name of the mission of the Church in education, health and welfare.

Figure 2.3 is a diagrammatic expression of the impacts of Vatican II, the postmodern civil world and the resultant implications for the ministries which the religious had canonical responsibility for.
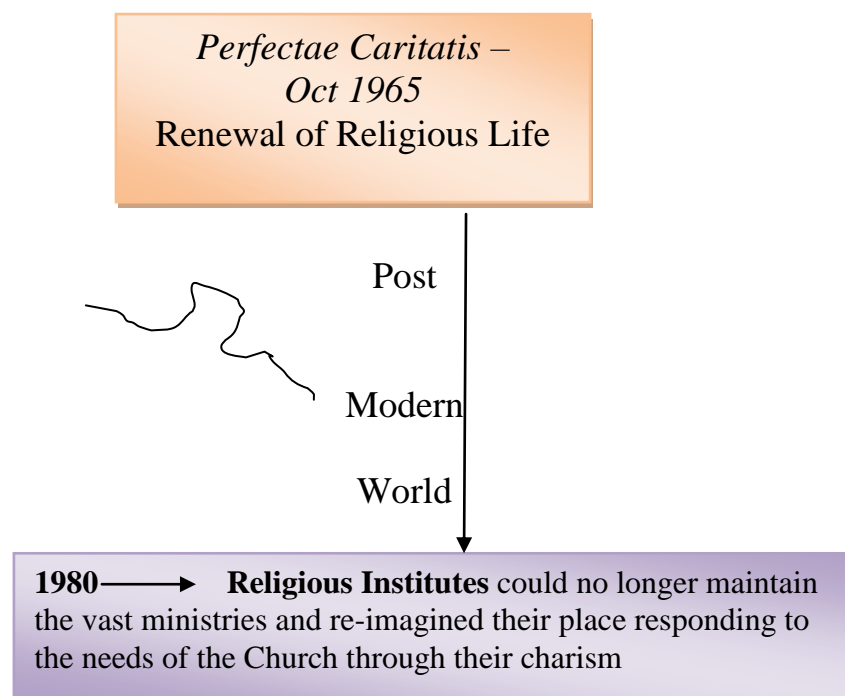
Figure 2.3   Historical Context for Religious Institutes 1965 – 2000+

2.3.2 Place of Religious in the Church

While Vatican II called for change and adaptation, the Bishops reaffirmed the role of religious in the Church as men and women who, as a result of a call from the Holy Spirit, sought to lead their lives following Christ in a particular way with vows of poverty, chastity and obedience with the goal of personal holiness and salvation. This way was usually in a community life and the purpose was dedicated to the building up of the Church through ministries as wide ranging as prayer, teaching, healing, caring in missionary situations that encompassed inner city, the following of migrants to new lands and the going out to lands where the Christian message has not been heard. In the tradition of the Church's social teaching and mission, the service has been directed to the poor and misplaced. The Bishops saw that "such a life as a necessary role to play in the circumstances of the present age" and stated this in *Perfectae Caritatis* (Abbott, 1966g, n 1).

Historically, new forms of religious life emerged in response to new needs in the Church and the world context, succinctly summed up by Schweickert (2002) as the movement from "the virgins and widows, the desert ascetics, the monastics, the mendicants, the apostolic congregations, the ministerial orders" (p. 1). The 16th to 20th centuries saw a huge increase in the number of religious and the expansion of the ministries (Seasoltz, 2003). One of the changes that accompanied the increase after the mid-19th century was the dispensing of the services "not by individuals on a one to one basis, but through large-scale institutions" (Wittberg, 2006, p. 9). This framework of institution, both in service and in community living, was all that those joining religious life knew for the next century until the revolution of the postmodernist world and Vatican II. Wittberg (2006), following Weber, showed that these people have a sociological identity as *religious virtuosi* whose role, in most faith traditions "have usually focussed on attaining, or helping others to attain, some form of inner spiritual perfection" (p. 5), or holiness. She explored the impact of the change from the religious living their lives for people through the ministry and seeing what the new role is for religious as a result of the leaving behind of the traditional ministries.

As the religious moved on to new calls, the question to be faced was the canonical leadership of the ministries and the formation needed for the task of continuing the leadership of the ministries and institutions which the religious had set up and operated. This research investigated what formation was needed and proposed a formation framework based on that seeking to outline the basic competency and skill set to undertake the responsibilities of canonical governance.

2.3.3 Relationship of Religious Institutes with Diocese and Bishop

Religious Institutes can be established by the Holy See or by a Diocesan Bishop (Canon 579). Whatever the origins, an Institute may only operate in a diocese with the permission of the Diocesan Bishop (Austin, 2011). It is important to note that the religious and their ministries are in the service of the Church which operates through a diocese under the leadership of the Bishop who has the responsibility to coordinate "all apostolic works and actions, with due respect for the character and purpose of each institute and the laws of its foundation" (Canon 680). The Religious Institute also has rights under Canon Law. However, there is a "fluidity" to be used in addressing matters of responsibility where the law is not clear as to who has authority to make certain appointments (Cusack, 2006). History has examples of where religious who had been invited into a diocese by a Bishop, saw the need to leave when the Bishop seemed not to support the character and purpose of the institute. However, there is a long history of religious working with deep commitment to the ministry and the people of the diocese in harmony with the hierarchical leader with pastoral responsibility for the people of his diocese. The emerging changes in the governance of the ministries saw Bishops needing to relate to leaders who do not come from a particular institute but are committed to the Catholic identity of the ministries. This research sought to address some of the implications for both parties.

2.3.4 Ministries as Strategies for Mission

The apostolic Religious Institutes which ministered to people's needs in the name of the Church for the sake of the Kingdom of God had, as their primary purpose, the mission of God and the salvation of the souls of the individuals who joined the life. People "wanted the life of dedication to God and to neighbour that was lived by the religious they knew" (Schneiders, 2001, p. 145). The ministries they conducted were usually strategies to achieve the mission. For example, the Congregation of Christian Brothers' Constitution 24 (1996) states that, through their Congregation, the brothers "are missioned by the Church for the evangelisation of youth, particularly the materially poor". The Congregation was not missioned to conduct schools. That was one of the very significant ministries by which it sought to be true to the mission. This involved them in running Teachers' Colleges to prepare brothers to teach. Education was very much a ministry focus which both created and used resources. The interaction of the life and the ministry shaped what Cleary (2007) explored, as the "meaning system" of the congregation and was shaped by and shaped the charism of the congregation. This was the usual pattern for Religious Institutes of pre Vatican II era. The post Vatican II era was to prove to be something quite different for the institutes. They lost the connection

with the institutional ministries and they lost their connection with the institute which provided the meaning system (Wittberg, 2006).

2.3.5 Sociological Realities – Call to the New

The mixing of Vatican II's call to change and a postmodern view of the world was generally seen as the catalyst for the response of priests and religious who left the way of life in the twenty years following Vatican II (Confoy, 2008). In the midst of these impacts on religious life were writers who spoke clearly of a call to rethink (Turner, 1986), re-evaluate (Schneiders, 1986) and re-found (Arbuckle, 1987; Wittberg, 1991).

This task has been undertaken courageously and with great pain. Images used have been *crossroads* (Schweickert, 2002), *journey* (Barnett, 2005) and *letting go* (Gottemoeller, 1991; Grant & Vandenberg, 1998). In each case, the writers were dealing with the changes in the meaning and purpose of the religious life when it was no longer focussed on the institutional ministries that the members had taken for granted. Ministries' needs had moved beyond the skills and capacities of the members yet the Religious Institutes still had the canonical and civil responsibility for the institutions which were providing the ministries. The tasks for the religious were to find ways to ensure that the ministries were governed differently yet continued to serve the mission of the Church (Fox, 2008; Gottemoeller, 2005; Hehir, 2008; McArdle, 2010).

The task, in the 21st century, for the Religious Institutes which were focussed on ministries, has been to discern the new needs in the Church for the members of the institute to address (Barnett, 2005). These needs and the dealing with them are expected to be much less institutionalised (Schneiders, 2001; Wittberg, 2006). As they undertake this task, the leaders of the Religious Institutes are also conscious of the need to ensure that the sacred tasks in ministry for which the institute has held responsibility in the name of the Church, are passed on and over to others who understand what is being asked of them. This change and their preparing for it in terms of forming others, has been a significant element of this research. This study enquired into the new needs in canonical governance for the new people to take up the mission and the governance of the ministries.

2.4 Models of Theology and Church

As the mission of the Church is the good news of God's kingdom, a significant element of the context is an understanding of God, expressed in theology. Macquarrie (as cited by Lennan, 1998, pp. 13-14), set out the elements and study of theology as proceeding from a 'religious

faith'. Macquarrie claimed that this proceeding required an understanding of 'faith', that it is a human activity; is not the preserve of any one religion; and is done by people who bring their personal faith into dialogue with an already existing tradition.

From this base, Lennan (1998) proposed that the dimensions of Catholic theology:

- embrace the human desire to seek meaning;
- encompass the conviction that God can be known by human beings and that God is known to us most fully in Jesus Christ;
- believe God's life giving presence continues in history through the Holy Spirit, the Spirit of the risen Jesus who sustains the Church and moves the human heart to be open to God, particularly the God revealed in the Bible;
- believe faith in Jesus is lived within the community of the Church and that those in authority within the Church – the College of Bishops under the leadership of the Pope – have a particular responsibility for nurturing the Church in unity;
- believe the faith leads to shaping the understanding of self and neighbour, seeking engagement with the world in mission .

This approach to theology shaped the practices, liturgical expressions and many doctrines which gave life to Cleary's (2007) "meaning systems" for the Catholic Church. Vatican II did not dismiss any of the elements, but it did call for the return to the understanding of the fundamental Christian relationship which is established through baptism.

2.4.1   Ecclesiology – Models of the Church

The study of the Church is called 'ecclesiology'. It stems from the efforts of people to understand and express what it means to be a Church and a member of the Church. As will be seen in several significant fields, while there is agreement in faith on the following of Jesus in bringing the good news of God's kingdom to the world, there is an acceptance that this will occur in several possible ways.

McBrien (1994, p. 1238) defined ecclesiology as "the theological study of the Church".

Dulles (1987) explored ecclesiology and nominated five models of Church; they are listed in Table 2.1.

Table 2.1   Models of Church

The Church as Institution
The Church as Mystical Communion
The Church as Sacrament
The Church as Herald
The Church as Servant

It is beyond the scope of this research to examine the models more fully, but it is important that the different models are known to exist, are acceptable and operate in the human sphere. Without an awareness of the different ways of being church, individuals and groups may become dogmatic that their model is not a model, but the only way of getting to God and doing God's work. Dulles (1987, p. 11) referred to his work as "examples of certain avenues of approach to the mystery of the Church". This pattern of difference is seen in types of theology and the cultural mindset that produced the way of seeing life in different contexts as reported in the types of theology.

2.4.2   Types of Theology

Just as there are different legitimate ways of understanding church which gave rise to different models, there are also identifiable approaches to theology or the study of a deity. In the Catholic tradition, three major approaches or types have been identified. Table 2.2 of Gonzales, cited by Bevans and Schroeder (2004, p. 37) gives an overview of significant approaches to theology over much of the life of the Church and their historical origins. The models describe ways of interpreting theology.

Table 2.2   Outline of Three Types of Theology (Gonzales,1999)

	Type A Theology	Type B Theology	Type C Theology
Origin	Carthage	Alexandria	Antioch
Culture	Roman	Hellenistic	Near Eastern
Key Figure	Tertullian	Origen	Irenaeus
Key Word	Law	Truth	History
Trajectory	Augustine	Abelard	Francis of Assisi
	Anselm of Canterbury	Schleiermacher	Early Luther
	Aquinas	Liberal Protestantism	Wesley
	Protestant Orthodoxy	Mohler	Barth
	Fundamentalism	Lonergan	Teilhard de Chardin
	Neo-Thomism	Rahner	Gutierrez
Christology	Person: High	Person:	Person: Low
		Premodern: High	
		Premodern: Low	
Ecclesiology	Institutional Model	Mystical Communion	Herald/Servant
		Sacrament	
Eschatology	Futurist	Realized	Inaugurated
	Individual	Individual	Historical
Salvation	Spiritual	Premodern: Spiritual illumination	Holistic
		Modern: Holistic	
Anthropology	Negative	Positive	Positive
	Hierarchical	Premodern: Hierarchical	Premodern: less Hierarchical
		Modern: Equality	Modern: Equality
Culture	Premodern: Classicist	Premodern: Classicist	Premodern: Classicist
	Counter-cultural	Modern: Empirical	Modern: Empirical
	Or translation models	Anthropological model	Praxis or moderate counter-cultural models
Figures in Mission	Francis Xavier	Cyril and Methodius	East Syrian Monks
		Matteo Ricci	Francis of Assisi
		Max Warren	Liberation theologians
		John Mbiti	

The important point about these three types of theology, or Christian ways of seeing the world, is that they are all ancient traditions in the Church. The theology of the pre-Vatican Church of the 19th and 20th centuries was very much Type A. Type A had become the dominant mode, and the danger from a dominant mode is that it can deem alternative views not just as alternative, but unorthodox, even wrong (Bevans & Schroeder, 2004, p. 37).

Type A can be said to be based on "keep the law and the law will keep you". The people who make the law like things nice and tidy. This creates an institution that can be controlled. The "god-ness" or divinity of Jesus, the "God-man", is emphasised rather than the humanity of Jesus – hence, the High Christology language. While the belief is that humanity is basically good, the capacity to get it wrong is highlighted and emphasised, so the law is there to command rather than guide and bring the followers to spiritual fulfilment. Thus, the different emphases across the models reflect different emphases about theology.

O'Meara (1999) claimed that Type A had been the major influence for most of the history of the Church:

For fifteen hundred years a structure of the Christian churches, the form (often the sole form) of the diversity has been not Christ and his Body, not the Spirit with its gifts, but clergy and laity (pp. 158-159).

The Vatican Council articulation re-imagined the Church, not with something entirely new, but with an emphasis on the alternative ancient traditions as described by Bevans and Schroeder (2004, pp. 65-66):

In many ways, the ecclesiology of the Second Vatican Council was influenced by Type B theology. The revolution at the Council was the move from an understanding of the church as a hierarchical, perfect society (Type A ecclesiology) to an understanding of the church as a community, the people of God mystically united to Christ (Type B)

Bevans and Schroeder suggest further that the seeds of Type C were also there in two documents – Decree on the Church's Missionary Activity and the Church in the Modern World (p. 66).

However, the formation for governance and ministry going on all around the world in 1965 was still in Type A ecclesiology. While change did take place to reflect the Council's call, by the early 1990s, Arbuckle (1993) was already building similar models to the one here and expressing fears about the Restorationist activity going on in the Church, designed to bring the world back to Type A dominance (pp. 18-20).

2.4.3   Models of Theology in Context

Vatican II's call for a change in approach saw the move away from the neo-scholastic theology which had dominated church thinking, practice and governance the previous centuries. The Postmodernist world saw the development of "practical theologies" (D'Orsa & D'Orsa, 2010; Lynch, 1998; Tracy, 1983) which are diverse and local rather than global where "local theologies give priority to criteria drawn from the cultural or political experience of particular groups rather than to the more traditional academic and, usually, male dominated categories that presented themselves as timeless and independent of any one culture" (Lynch, 1998, p. 168). This pluralism, in the unity and diversity of the Church, acknowledged the perspectives of women, the poor and the indigenous. It also explored the perspective of the laity in finding God in the secular world as well as in their increasing ecclesial role (Muldoon, 2009).

The breadth of the perspectives was demonstrated by Ormerod (1997), in outlining the approaches of several theologians such as Kung, Moore, Schillebeeckx, Rahner, Lonergan, Metz, Guiterrez, Boff, Fiorenza, Johnson and Ruether, demonstrated the diversity in starting points, contexts and conclusions of people who still hold to the unity of belief.

Bevans (2002) analysed the contextual approaches to theology and described six models:

Translation
Anthropological
Praxis
Synthetic
Transcendental
Countercultural

It is beyond the scope of this research to examine all of these models, but this range highlighted the point that there is not a single approach that fits all situations. Leaders, canonical governors included, need to be aware of the differences and what is relevant in the particular situation in reading the signs of the times for ministry leadership.

2.5 The Changing Role of Laity in the Church

Just as the Bishops gave a section on Religious Life in *Lumen Gentium* and then dealt more fully with religious life in *Perfectae Caritatis*, they used the same approach reflecting on the role of the laity in the Church in the world.

2.5.1 Vatican Council II

The Decree on the Laity was entitled *Apostolicam Actuositatem*. The radical recovery expressed in this document was the statement of the responsibility of all Christians, not just the clergy, for the spreading of the good news and the bringing about of the kingdom of God (Leckey, 2006). This aspect of renewal placed the proclamation of the salvific mission of the Church through the sacraments of baptism and confirmation, not through the sacrament of orders which had been the view which had dominated the operation of the Church.

This significant shift in thinking recovered the role of all Christians and dignified the place of all members of the Church as carriers of the good news (Leckey, 2006; Muldoon, 2009). Moreover, it articulated that the place of carrying out this task was in the secular world. "The laity's relationship to the world gives the lay apostolate a special character. The emphasis here is on identity, not function … The laity, because of their secular character, make the Church present and operative in the world in a way distinct from that of clerics and religious" (Hagstrom, 2003, pp. 155-156). The proclamation of the laity's role in their typical life in

family, workplace and social life, contributed to the development of a theology of the laity which had been growing through the work of theologians such as Yves Congar who saw that the ministries of the Church were activities of the whole community of believers (Fox, 2003, p. 140; Lynch, 1998, p. 173).

This renewed understanding of the community of the Church as the People of God was given further depth in *Apostolicam Actuositatem* as the Bishops fleshed out what they had said in *Lumen Gentium* as noted by Hagstrom (2003, p. 156).

> If the life of the laity in the world is *in itself* an instrument of the Church's mission, then the everyday activities of the laity can take on a redemptive value. Thus, temporal activities are not simply a *means* but also an *end* in themselves to exercising the apostolate of the laity.

The secular nature of the life of the laity was being expressed as a theological reality that it was through this life that the laity found God and carried the message of hope to the world. The concomitant of this thinking was the need for formation of the laity for the role.

2.5.2   Emerging Practice in Theological Education

Where theology had previously been taught mainly in seminaries to men in priestly formation, chairs were established in universities and classes in both seminaries and universities were made up of religious and lay people (Leckey, 2006, p. 10). It was particularly significant for those seeking to become teachers in Catholic schools, leaders in health ministry and the growing number of lay people who were to become the lecturers and professors in theology, not only at the universities, but at the seminaries themselves. This occurred in the 30 years post Vatican II when the number of religious was dramatically falling in the western world and their work and leadership in the ministries was being carried out by lay people if it was going to continue to contribute to the mission of the Church.

2.5.3   The Coming of New Leadership in Ministry

The call for change by Vatican II had provided no readiness for the changes to be enacted at either a theoretical or practical level. Ricoeur, who had authored the phrase "hermeneutics of suspicion", had also said that "if you want to change behaviour, you must first change imagination". The Bishops had given the words to change imagination, but the confusion that this call had on existing imagination would take some 30 years to change behaviour. People needed this time for the creative interpretation of what had been said and ongoing implementation, particularly in countries where the rapidly increasing educated Catholic lay

people were seeking new ways of taking up the call (Wood, 2003). They were creating a range of paths with limited formation in the new understanding of the ancient tradition.

Grant and Vandenberg (1998) set out the history of the movement from the world of ministries operated by Religious Institutes in which the meaning system was created and operated with religious in governance, management and operations to lay leadership in management and eventually in governance. With the change came the introduction of the term in the USA "Sponsorship of the ministries". This term has some confusion as a developing concept (CHAUSA, 2007b, p. 6), but it will suffice, for this research, to equate it with the role of the canonical governance of a Public Juridic Person and the people who are the members of the Public Juridic Person.

Table 2.3, describing the changes in Catholic healthcare management and leadership in the USA, shows the development from the pre Vatican world of the 1960s where all roles were wrapped up in the members of the Religious Institutes to changes which saw the separation of workers, managers, administrators and governors of the ministries.

Table 2.3 Evolution of Sponsorship (Canonical Governance) (Grant & Vandenberg, 1998, p. 16)

Period	Governance	Management	Sponsorship	Organization
Pre-1960	Local superior and council	Local superior as CEO	Not clearly defined; frequently identified with number of religious	Stand alone, independent healthcare facilities; school "systems" within congregations
1960s	All-religious boards; lay advisory hospital boards; school boards	Predominantly religious, few Laypersons; appointment by the religious congregation's leadership	Beginning of formal definition: tied to appointments of CEOs and boards; still synonymous with numerical presence	Beginnings of centralized services for healthcare facilities, generally through motherhouse offices-similar to education
1970s	Formal boards - religious and laity serving together	Approximately 50% lay hospital CEOs; growing numbers of lay principals, presidents	Continued search for definition; influence role emerging	Healthcare systems developing, generally based within single congregation; withdrawal from congregational sponsorship of schools
1980s	Boards fully integrated: lay and religious	Co-partnership of religious and laity serving in executive leadership	Searching for the most effective locus: management or governance	Alliances, networks and multi-congregation; arrangements; health systems; college university consortia
1990s	Professional boards, some paid members in health (generally religious)	Professional management; full incorporation of laity into ministry	Two models: lay and religious congregation	Mega health systems regionally or nationally; fully integrated systems college mergers or co-sponsorships
2000	True governing boards; in healthcare with fiduciary responsibilities for integrated health system	Little change: professional managers in both hospitals and in educational administration	Increasingly more models of lay sponsorship; few solely religiously sponsored organizations	Continued consolidation in health and education ministries; in healthcare with emphasis on critical mass at regional level

This research dealt with the changes reflected in the section marked in grey under Governance: *Increasingly more models of lay sponsorship; few solely religiously sponsored organizations.*

In 2011, CHAUSA reported that, in response to a survey, 85% of members of Catholic Health Association USA who currently do not have lay canonical governors expect that by 2016 they are most likely to have moved to that position (Catholic Health World, 2011a).

As religious have relinquished, or been unable to fill various roles at all levels of the ministries, lay people have become involved. Table 2.3 showed the pattern moving first in management, then governance, associated with huge changes as ministries lost not only the religious but the ability to stand alone. This brought about mergers with other Catholic ministries which saw the ministries lose their distinctive charism and bring out the need to

identify that which made the entity "Catholic" and serving the mission of the Church as ecclesial ministries (Wood, 2009).

This also saw lay people engaged not just in the secular world as envisaged by *Apostolicam Actuositatem*, but in Church ministries as ecclesial workers. Figure 2.4 offers a diagram of the change.
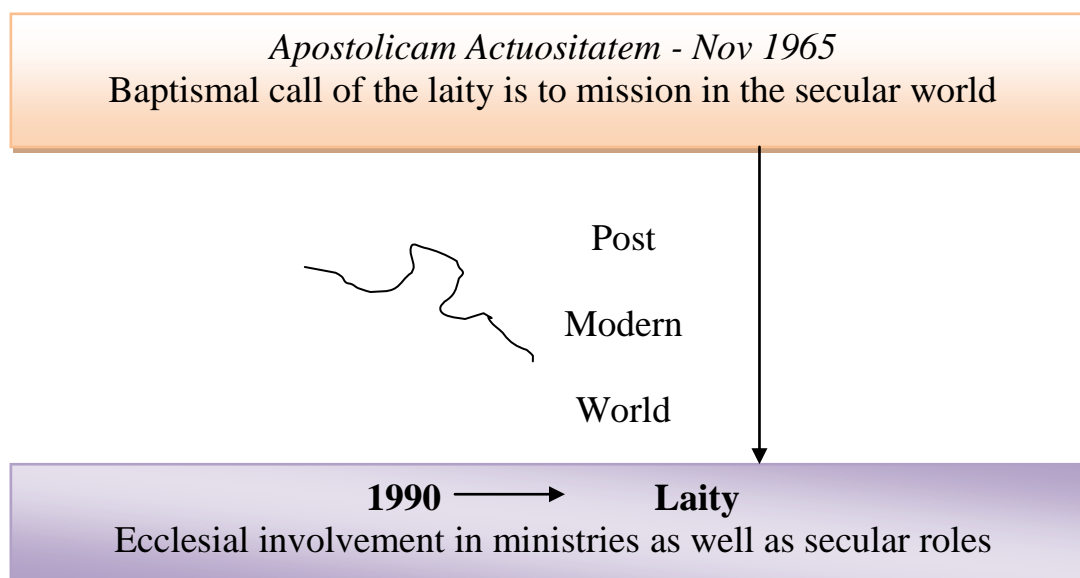
Figure 2.4   Historical Context of Lay Involvement

2.5.4   Examples of the Public Juridic Persons

The significance of the question of formation for canonical governors can be assessed from the size of organisations the 'mega health systems' that people are asked to lead in the name of the mission of the Church. The data for Table 2.4 has been obtained from websites or documents using 2010 or 2011 Annual Reports, depending on the organisations accounting period.

Table 2.4   Examples of Catholic Health Systems

Organisation	Annual Revenue	Employees	Reference
Catholic Health East	$US4.1 billion	54,000	Catholic Health East (2011)
Ascension Health	$US15.5billion	113,500	Ascension Health (2011)
Trinity Health	$US7 billion	53,000	Trinity Health (2011)
Catholic Health Initiatives	$US10.6 billion	N/A	Catholic Health Initiatives (2011)
Covenant Health Systems	$US547 million	N/A	Covenant Health Systems (2011)
Catholic Healthcare	$AU44.5 million	3,454	Catholic Healthcare Limited (2011)

Where possible in the research, annual revenue and full time equivalent employee numbers have been sought, although the latter were not always available. Figures on USA health systems show that 6 of the 20 largest systems are Catholic and had revenues between $US3 and 13.9 billion in 2010 (Modern Healthcare, 2011). These examples indicate the enormity of

what is being asked of people when invited to be stewards of these Church ministries as canonical governors.

2.5.5   Overview of the Historical Movement

Figure 2.5 gave an overview of the relationships in the historical processes which have been outlined above. It also included the historical flow of the canonical changes which eventually intersect with the changing cultures and practices, and the implications of new needs in governance in the Church which led to this research.

Election of John XXIII as Pope – October 1958

25 Jan 1959, calls for

Vatican Council II

Rewrite of the 1917 Code of Canon Law

*Vatican II (1963 -65) re-imagined the Catholic Church from **A Perfect Society** to **The Pilgrim People of God**.*

Relevant Vatican II Documents for this research

Lumen Gentium - Nov 1964
Dogmatic Constitution on the Church

Perfectae Caritatis - Oct 1965
Renewal of Religious Life

Apostolicam Actuositatem - Nov 1965
Baptismal call of the laity is to mission in the secular world

Ad Gentes - Dec 1965
All the baptised are called to mission

Gaudium et Spes- Dec 1965
Pastoral Constitution on the Church in the Modern World

Modern World

Interaction of Vatican Proclamations and Post Modern Changes

Post

Modern

World

**New Code of Canon Law
25 Jan 1983**

New language for a Legal Entity – Juridic Person *Cns 113 - 123*

Religious
Couldn't maintain the vast ministries and re-imagined their place responding to the needs of the Church through their charism

Laity
Ecclesial involvement in ministries as well as secular Roles

Mission
Local as well as for the world

(See Grant & Vandenberg, 1998)

1983 – 2010 The Need arose to use Canons 113 – 123 to create new forms of PJPs to govern the Ministries

Early 1990ies – 2010 PJPs established by pontifical, provincial, diocesan authorities in USA, Canada, Australia, Ireland

Figure 2.5 Historical Contexts for the Study of Canonical Governance

2.6   Formation Needs for Laity in New Governance Roles

The nature of formation and formation needs are intimately connected to the nature of governance. In this research, governance was defined as responsibility for the ministries of the Catholic Church in the light of the Church's law as set out in the Code of Canon Law. The Church has documented formation frameworks for those in ordained clerical ministries, and lay people in ecclesial ministries in the USA, but none as yet for those involved as lay people for the governance of ecclesial ministries. This research investigated whether the framework used in those two areas provided an appropriate framework for formation for canonical governance.

The 1917 Code of Canon Law reserved jurisdiction, or governance to "clerics" (Austin, 2011; Beal, 1995, p. 8). Thus, the laity had no role in governance in Church matters. While Vatican II, with its different theological approach promoted and proclaimed the significance of the laity and their responsibility from baptism, the wording in *Lumen Gentium* 33 did not give a clear mandate as to how this might happen or what roles might occur or what roles might be filled (Beal, 2006).

This ambiguity provided a major problem, both in the Council and in the years preceding the proclamation of the new Code of Canon Law in 1983. Two schools of thought existed in the canonical debate – one firmly of the belief that there was no suggestion of delegation to laity of governance powers and the other that there were clear intentions for laity to be involved in governance not associated with priestly responsibilities (Beal, 1995, pp. 18-52). This debate culminated in the wording in Canon 129 of the 1983 Code as: "Those who are in sacred orders are, in accordance with the provision of law, capable of the power of governance, which belongs to the Church by divine institution. This power is also the power of jurisdiction." (Clause #1).

In Clause 129#2, a new concept flowing from Vatican II was added: "Lay members of Christ's faithful can cooperate in the exercise of this same power in accordance with the law" (1983).

These canons still left room for interpretation as to the part that laity could play in governance at a time when, as seen in Section 2.5, the historical reality was that clerics and religious could no longer undertake the roles of governance in many of the ministries. For some, this is firstly a theological question rather than a legal question (Beal, 2004). Huels (2000) put a case for lay involvement in governance from a juridical approach. Beal (1995, p. 85) indicated that there was a recent trend to reflect on the Church as *communio* rather than a perfect society, which is the model that underpinned pre Vatican thinking and theology

(Austin, 2011). The case was put strongly by Coriden (2000, p. 129) that there was ample evidence from *Lumen Gentium* that Vatican II intended to reclaim a place for the laity in governance roles. He gave examples of lay people in significant positions in the Church as judges in tribunals, principals and directors of social services. "The Canons of the Code explicitly provide for many of these offices. To pretend that these key leaders of the Church's ministry do not share in the power of governance is to perpetuate a fiction" (p. 126).

While the theological and juridical questions are still unresolved and noted in the literature, the reality is seeing lay people take on governance roles in the Public Juridic Persons that have been created in the period after the proclamation of the 1983 Code of Canon Law.

The post Vatican II era has seen the increase in Catholic lay people undertaking theological and spiritual formation for themselves, and have been encouraged to do so in the light of their baptismal responsibilities and the need for ministry (Dixon, 2005; Hahnenberg, 2009; Lakeland, 2009; Leckey, 2006, 2009). This has been particularly evident in teaching, welfare and health ministries and was extremely important for those working at the coalface of the ministries where the studies have been undertaken for professional career development as well as personal spiritual development. There has not been such a clear focus on the formation needs of people in canonical governance, where the responsibility was for the maintenance of the mission of the Church. For such formation there is a twofold task of defining the elements needed in formation and preparing programs for suitable, possible candidates. This is challenging given that these leadership roles are becoming more complex in the ministries as the formation needs are being determined.

Much of the literature of the past twenty years told the *story of how change to lay involvement in canonical governance was enacted* (Bonnell, 1992; Burns, 2006; Eck & Morris, 2005a, 2005b; Ferrera, 2000; Gray, 2005; Kaiser, Tersigni, Serle, & Dover, 2007); *concerns about Catholic Identity for mission* (Arbuckle, 2006, 2007a, 2010; Gallin, 2000; Gascoigne, 1995; Gottemoeller, 1991, 1999, 2007; Hehir, 2008; Morrisey, 2001a); *what needed to be in formation programs for sponsors* (Abeles, 2008; Canales, 2008; Golden, 2006; Grant and Kopish, 2001; Homan, 2004; M. Kelly, 2007; Peters, Conroy, Lunz, Mollison, & Munley, 2003; P. Smith, 2006a); and *some developing programs for sponsors* (M. Kelly, 2007; Kelly & Mollison, 2005; Maltby, 2007).

There has been significant writing on the need for the *development of a theology of sponsorship* (Bouchard, 2008; Casey, 1991, 2000, 2005; Downey, 2003; Grant & Vandenberg, 1998; Hester, 2000; Lynch, 1998; O'Meara, 1999; Peters, 2005; Place, 2004; Rinere, 2003; Talone, 2004, 2005); and increasingly, on the *place of lay spirituality* (Bechtle,

2005; Downey, 2005; Fox, 2005a, 2010b; Fox & Bechtle, 2005; Hahnenberg, 2003; Hellwig, 2005; Pirola, 1995; Rush, 2007; Statuto, 2004).

The literature revealed the search, the trials, the learnings of what existed and what needed to be further understood particularly with regard to mission and Catholic identity. What then was revealed was the interaction of the personal development and formation of individual people and the needs for leadership of the ministry. Lay people were on a very new journey for the needs of the mission of the Church, bringing their own life story and spirituality. They were being asked to be the 'sense makers' (Chait et al., 2005, p. 106) articulating the story of ministries to which they may be very new. They may be invited to take governance responsibility for a health system and yet never sat beside a patient in a hospital. The literature was very much about the search, rather than research.

CHAUSA had initiated some research (Beale & McMullen, 1998; Larrere & McClelland, 1994; Sullivan Clark, 2005) and used it to develop some formation programs (CHAUSA, 2005a, 2005b, 2007b, 2007c) which sought to differentiate the needs for Sponsors or canonical governors (PJP members), Board Directors and Senior Management in executive roles.

2.6.1   Leadership for Mission and Ministry

The leadership of Catholic ministries sits in a broader setting of leadership in non-profit entities. While these entities encompass a huge range of activities from international aid agencies to small social clubs, all of them are driven by a mission based on a belief that is designed to effect some good for the community. The significant characteristic is seen in the title of non-profit which demonstrates that the activity is not operated to provide returns in the form of dividends from profits generated for the benefit of those who have invested money in the expectation of increasing their personal income (Chait et al., 2005). Governments recognise the difference and enact laws which allow civil identity and often a range of concessions by way of tax exemption. While there is a wide range of motivations which are acknowledged as legitimate, "it is recognised that religion has been a significant motivator of non-profit activity in much of the western world" (Cleary, p. 73).

Given that the focus of the religious activity is mission, there is no surprise here. Often, it was the Religious Institutions in the 18th and 19th centuries which saw needs in health and universal education and set out to do something about it when the state or nation did not. Those functions have now been recognised in most societies as a responsibility of society and provided by government for all. Some, such as health, have moved so far as to be seen as

profit making opportunities so that non-profit mission based organisations not only find themselves in competition, but are objected to by the "for profits" because of their tax advantages from the state.

Leadership for Catholic ministry often needs the skills of conducting a large and sophisticated business. The skills, competencies and vision must, at the same time, be grounded in the understanding that the bottom line of profit is not the driving motivation of the mission and that the mission comes from the Church which has given validity to what people in the ministry have dreamed as possible in the past. There is a view that the leadership role of governance of many organisations, both for profit and non-profit, has been taken over by management (Chait et al., 2005, p. 2) and that the governance leaders were acting as managers (Chait et al., p. 4). These writers set out to explain the right relationships and the role of governance in leadership and sense making for the organisation. The history of Catholic ministries showed that the religious were in multiple roles (Grant & Vandenberg, 1998) so that defining the differences in roles as suggested by Chait takes on increasing importance for the ministries in the new governance scenarios.

The separating out of the governance and leadership roles away from the religious institutes whose leaders saw themselves as ministers, has raised the question as to whether the new leadership responsibilities need to be seen as a ministry in itself – the ministry of governance. This question was raised by the Canon Law Society of America (Mallett, 1986), Austin (2000) and Grant (2001b) and considered by CHAUSA (2006a, 2007a) but does not seem to have attracted much attention in the literature since. In the light of the governance responsibilities for the mission of the Church and O'Meara's (1999) definition of ministry as "the public activity of a baptized follower of Jesus Christ flowing from the Spirit's charism and an individual personality on behalf of the Christian community to proclaim, serve, and realize the kingdom of God", the concept presented as worthy of further exploration.

2.6.2   New Professionals in the Church

While Vatican II proclaimed and confirmed the secular nature of the life and spirituality of the laity, and that this was to be witnessed in their employed life in factory or office, the reality of the following years was that more people were employed in the Church in roles that either were previously filled by clergy and religious, or did not exist in previous times. Roles have been created in parishes and filled by employed lay people such as Pastoral Assistant, Director of Mission, Sacramental Coordinator and Youth Coordinator. In the Diocesan Offices (Curia) similarly, there are lay people in significant roles in Mission, Finance,

Spirituality, and Social Justice, depending on the priorities and resources of the Diocese (Klimoski, O'Neil, & Schuth, 2005; Lucas, Slack, & d'Apice, 2008). In Catholic universities, lay people hold chairs in theology, a scenario never imagined by the Bishops of Vatican II.

Some writers were concerned that this was creating a new class of Catholic lay person as a professional elite (Pirola, 1995). In the USA, The Conference of Catholic Bishops (USCCB) produced a document outlining the place of the ecclesial ministers in that country – *Co-Workers in the Vineyard of the Lord* (USCCB, 2005). The emphasis of the document was on parish based employees exercising ecclesial roles. Their follow up work on their website detailed the elements of the role of a lay person to be that of an ecclesial minister. It involved:

- *Authorization* of the hierarchy to serve publicly in the local church;
- *Leadership* in a particular area of ministry;
- *Close mutual collaboration* with the pastoral ministry of Bishops, priests, and deacons;
- *Preparation and formation* appropriate to the level of responsibilities that are assigned to them (USCCB 2006).

The relevance for this research is whether canonical governors exercise a ministry – the ministry of governance – and have an ecclesial role with the implications for formation that would follow from that role.

2.6.3 Governance in the Church

The official Church writings about formation are usually around formation for ministry and mission and not around formation for governance. The power of governance is set out in Canons 129 – 144 but not accompanied by any indication of formation for the exercise of the power. Canon 375 is the first Canon on the role of the Bishop and states, among other responsibilities, that they are 'ministers of governance'. This is the only reference to the term in the Code (Willis, 1986, p. 160).

2.6.4 Formation for Mission and Ministry in the Church

In the development of the research question on formation for canonical governance, a difficulty was identified with a definition of "formation". The literature usually spoke about the expected outcomes from formation (Giganti, 2004; M. Kelly, 2007; Mudd, 2005; Pope John Paul II, 1988; P. Smith, 2006a) or assumed that the meaning of the word is understood (Roman Catholic Church, 1983 – Canons 569-661).

In the relevant literature, *Pastores Dabo Vobis* spoke of priestly formation, nominated four dimensions to be addressed as human, spiritual, intellectual and pastoral, but it was difficult to discern anything more than the assumption that formation was necessary. *Co-Workers in the Vineyard of the Lord* for ecclesial lay ministers nominated the same four dimensions as forming the framework for formation.

In the light of this data, the researcher composed a definition for formation of persons for canonical governance as follows:

> *a reflected development on one's gifts and how the gifts contribute to the need in hand providing an holistic preparation of a person for a role – human, spiritual, intellectual, pastoral – including reflection on the experiences of their own life which might highlight some lacks in development or knowledge that are essential for that need.*

Since the commencement of the research, Bouchard (2009) provided a definition of formation which was similar in many respects. He fixed it in religious language, but provided the term 'transformative process' indicating that some change is to be expected from the process (p. 40)

> *"'Formation' is a transformative process, rooted in theology and spirituality, that connects us more deeply with God, creation and others. Through self-reflection it opens us to God's action so that we derive meaning from the work we do, grow in awareness of our gifts, see our work as vocation and build a communal commitment to the ministry of health care."*

The commitment to formation of people for the responsibility of mission and the tasks of ministry has been deeply embedded in the history of the Church and failures to attend to the responsibility often led to severe consequences. The Council of Trent dealt with the formation needs for Scripture study for priests in Session 5, June 17, 1546 (Roman Catholic Church) and Keogh (2008, pp. 24-33) detailed the difficulties in 18th century Ireland with the lack of priestly formation and the failure to implement the reforms of the Council of Trent.

2.6.4.1   Formation for Priesthood

Vatican II set out the decree *Optatam Totius (Abbott, 1966f)* on priestly formation, acknowledging the debt it owed to the Council of Trent in the area and proclaimed an emphasis on training for "the whole human being" (Confoy, 2008, p. 104). In Section 6 the decree stated the areas of formation which need to be attended to (Abbott, 1966f, p. 443):

> With watchful concern for the age of each and for his stage of progress, an inquiry should be made into the candidate's proper intention and freedom of choice, into his spiritual, moral and intellectual qualifications, into his appropriate physical and psychic health-taking into consideration also possible hereditary deficiencies. Also to be considered is the ability of the candidate to bear the priestly burdens and exercise the pastoral offices.

It is here that the four dimensions of human, spiritual, intellectual and pastoral had their basis and are used in subsequent documentation.

The 1983 Code of Canon Law set out the requirements in formation for men to become priests. It required the harmonious blending of "spiritual formation and doctrinal instruction" (Cn 244) so that the students "develop the requisite human maturity and acquire the spirit of the Gospel and a close relationship with Christ" (Cn 244).

The students are to be educated over a period of six years in the branches of theology, philosophy, sacred Scripture and languages as well as ministerial skills in homiletics, parish administration and pastoral understanding (Cns 250 – 258).

The shape of formation was addressed by Pope John Paul II nine years later in *Pastores Dabo Vobis* (1992). The framework for priestly formation was set out under four dimensions – *Human, Spiritual, Intellectual,* and *Pastoral*. These dimensions reflected the elements required for formation in the Code of Canon Law mentioned above but flowed from the Vatican Council decree on priestly formation.

2.6.4.2   Formation for Religious Life

While the Canons were not as specific on the formation requirements for religious (Cns 641 – 661), they did require that the formation be "systematic, adapted to the capacity of the members, spiritual and apostolic, both doctrinal and practical" (Cn 660). The same Canon calls for members to obtain "suitable ecclesiastical and civil degrees … as opportunity offers".

In response to the reflections and recommendations of a Synod on Religious Life in the Church, John Paul II published the Exhortation *Vita Consecrata* (1996) "The Consecrated Life". While the scope was broader than formation, formation was a key point of focus:

> Moreover, the formation of consecrated women, no less than that of men, should be adapted to modern needs and should provide sufficient time and suitable institutional opportunities for a systematic education, extending to all areas, from the theological-

pastoral to the professional. Pastoral and catechetical formation, always important, is particularly relevant in view of the new evangelization, which calls for new forms of participation also on the part of women (58).

The formation needs for religious brothers were dealt with separately:

This requires an appropriate and integral formation: human, spiritual, theological, pastoral and professional (60)

The point of interest for the research was that the headings for a framework for formation were very similar to that used for priests in *Pastores Dabo Vobis*.

Later, this was followed by an "Instruction" from the Congregation for Institutes of Consecrated Life and Societies of Apostolic Life (CICLSAL 2002) where the encouragement was for an awareness of on-going formation for the spiritual life (15) without any framework as set out in the earlier documents.

2.6.4.3   Formation for Laity in Church Roles

With regard to formation for the laity, The Code of Canon Law is very sparse:

Can. 231 §1 Lay people who are pledged to the special service of the Church, whether permanently or for a time, have a duty to acquire the appropriate formation which their role demands, so that they may conscientiously, earnestly and diligently fulfil this role.

For priestly and religious formation, the responsibility and resourcing for members lies with the Church institutions. Here, for the laity, the responsibility for formation is personal. It implies that they will be responsible for the resourcing of any formation. It implies that they understand what formation is needed for whatever 'special service' they are 'pledged to'. Involvement in canonical governance requires such a commitment.

However, the Canons recognise that if lay people are employed in the Church – ecclesial people – they have civil rights in accordance with Catholic social tradition:

Cn 231 §2 Without prejudice to the provisions of can. 230 §1, they have the right to a worthy remuneration befitting their condition, whereby, with due regard also to the provisions of the civil law, they can becomingly provide for their own needs and the needs of their families. Likewise, they have the right to have their insurance, social security and medical benefits duly safeguarded.

In Cn 228, lay people are capable of being admitted "to those ecclesial offices and functions" which they can lawfully discharge.

Coriden (2004, p. 63) stated that "these obligations and rights of the laity have provided the basis for much of the expanded participation of laypersons in the worship, witness, governance, and ministries of the church since the promulgation of the Code".

This study focussed on the formation needs for lay people for canonical governance. While there was little in the literature about formation for laity for governance or what shape the lay formation should take for this role, the seeds of a framework for formation use the language of the nominated dimensions are in *Apostolicam Actuositatem* (Abbott, 1966b). In Chapter 6, "Formation for the Apostolate", the Bishops set out that formation for the apostolate required "a certain human and well-rounded formation" (n29); "Spiritual formation" (n29); and "solid doctrinal instruction in theology, ethics and philosophy" (n29); and dealing with "the reality of the temporal order" (n 29) – a requirement for the pastoral dimension.

Lay formation was dealt with by the 1987 synod – a meeting in Rome called by the Pope with representatives of the Church throughout the world. The resultant document from the Pope was the Exhortation *Christifideles Laici* (Pope John Paul II, 1988). The focus was strongly on the secular nature of the lay state (Hagstrom, 2003) and thoughts on formation are throughout the document. The formation is for spiritual and apostolic purposes (29); to help form mature ecclesial communities (34); it is for the maturation of faith (57); it should have spiritual and doctrinal dimensions, particularly Catholic social doctrine (60); and it would be for personal formation (63) (see Nicholson, 2011).

The document did not use the framework that characterised the documents for priestly and religious formation, nor did it deal with the needs of the ecclesial workers – a role which was just beginning to emerge in 1988.

2.7   Four Dimensions of a Formation Framework

The Human, Spiritual, Intellectual and Pastoral Dimensions, as used in the documents *Pastores* and *Co-Workers*, were compared with sample content.

Pastores referred to "Traits" and *Co-Workers* referred to "Elements" when outlining what were regarded as effective qualities, conditions or skills.

One of the discoveries from reflection on the data from the interviews was that interviewees were using a wide range of meanings for significant terms when they were responding. This led the researcher to develop some further explanations in the literature

review. Words and concepts which flowed out of the four dimensions are explored in the sections below each relevant table. Tables 2.3-2.6 list sample concepts from the two documents by dimensions and key concepts from each are examined.

2.7.1   Human Dimension

In Table 2.5, excerpts from the two relevant documents regarding the Human Dimension were placed side by side. This allowed a comparison of the language used and concepts that were engaged. This process highlighted similarities and differences.

Table 2.5   Sample Comparison between Two Documents using Same Dimensions for Framework – Human Dimension

Pastores Dabo Vobis	Co-Workers in the Vineyard
Trait	Element
The priest should mould his human personality in such a way that it becomes a bridge and not an obstacle for others in their meeting with Jesus Christ the redeemer of humanity	Human formation seeks to develop the lay ecclesial minister's human qualities and character, fostering a healthy and well balanced personality, for the sake of both personal growth and ministerial service.
Love the truth	Understand self – Relate with God & others
Loyal	Psychological health
Affective maturity Respect every person – Capable of friendship to enable celibacy	Mature sexuality Genuine respect & concern for others – Rooted in the example of Jesus
Sense of justice	Physical health
Genuinely compassionate	Know gifts & charisms
Integrity	Understand family systems & dynamics
Balanced in Judgement & Behaviour	Ability to learn from praise & criticism

In the Human Dimension, the concepts and terms deemed worthy of further exploration were 'human maturity', 'justice', 'compassion', 'respect for persons' and 'self-awareness'.

2.7.1.1   Human Maturity

In *Co-Workers*, the Bishops outlined what they believed human formation was expected to achieve.

> Human formation seeks to develop the lay ecclesial minister's human qualities and character, fostering a healthy and well-balanced personality, for the sake of both personal growth and ministerial service" (United States Conference of Catholic Bishops, 2005).

The researcher summarised these qualities as human maturity.

Župarić (2010) described the concept of human maturity as relating to one's own identity and integrity. He explained that "maturity is a dynamic concept that includes development and the tendency toward fullness [physically and spiritually]" (p. 105). He added that human

maturity is never complete, nor is the process of maturity perfect, and therefore there is always a duty to improve. This understanding of human maturity included the view that individuals (canonical governors included) are able and willing to grow in maturity and that formation is an important means of fostering such growth.

2.7.1.2   Justice

From the reflections on justice, there emerged the awareness that the understanding of justice had a cultural basis. Individuals and societies deem what is considered to be justice. Some countries allow for capital punishment in their system of justice (Robinson, 1997), some allow for mutilation for theft (Shaykh, 2005), while other countries allow neither but are criticised by some of their citizens for the way immigrants are treated (Brennan, 2011). When it came to interpreting justice in a particular framework, the cultural milieu influenced the meaning of justice and that flowed through to how justice is practised in ministry.

The issue is not new. While the Acts of the Apostles told of the life of the early church and the passionate effort to help the poor, Paul's Letter to Philemon on how his friend might deal with his runaway slave Onesimus clearly showed that Paul saw slavery as part of the justice system of the time.

2.7.1.3   Respect for Persons

The rationale for respect for persons flowing from a belief in the dignity of the human person in itself seems not to have been deeply explored in the literature. Hursthouse (2007, p. 59) noted that the term "human dignity" is "surprisingly modern". She traced the use of *dignity* in relation to human beings back to Kant in 1785. The earliest formal use of the term *human dignity* she found was in the UN "Declaration of Human Rights" in 1948 (2007, p. 65).

Catholic Social Teaching had begun using the term in the mid-19th century, but in the context of the "dignity of the worker" rather than in an holistic sense (Aubert & Boileau, 2003, p. 77).

The ancient Christian concept of caring for the other, therefore, did not use the term "human dignity" or "dignity of persons". It did, however, use the theological term for respecting both self and the other as people being a "temple of the holy Spirit" (1 Cor 6:19).

2.7.1.4   Compassion

Hursthouse (2007) used the term "charity" rather than "compassion". After noting that justice is concerned with rights, she explained that "it is charity, not justice, that requires that we stop

to help the wounded stranger by the roadside" (p. 66). She explained that we would be within our rights, if not to pass by, at least to do a great deal less. Thus charity, as she uses the term, is the activity of providing support for the marginalised, an activity which falls under the definition of compassion.

The focus on the meaning and relationship between these traits is echoed in the literature. From a scriptural and theological point of view, Brueggemann (1978, p. 26) spoke of the relationship and the tension between compassion and justice.

White (2010, p. 1) dealt with "explicit values of justice or compassion (and derivatives of those words, known to have similar meaning)". White's use of the term "derivatives" of the words opens up the question of the relevant derivatives. "Mercy" and "charity" fit as expressions and several Religious Institutes have these terms as part of their name, for example, Sisters of Mercy and Sisters of Charity. These are among the Institutes which have conducted the ministries.

2.7.1.5   Self-Awareness

The concept of self-awareness addressed the movement in a person "toward human maturity, toward their own identity and integrity" (Župarić, 2010).

O'Connell-Killen and de Beer (1994) described the process of searching for meaning as a movement through which "we enter our experience, we encounter our feelings. When we pay attention to those feelings, images arise. Considering and questioning those images may spark insight. Insight leads, if we are willing and ready, to action" (pp. 21-22) This described the process of self-awareness or becoming aware of new insights. For this research, the insights were about linking values, decisions and actions; reflecting on needs created by a change in circumstances in the ministry operation; or an awakening of a deepening understanding of the meaning of the mission which the ministry serves. This process is aided by purposeful formation.

2.7.2   Spiritual Dimension

The concepts and terms in the Spiritual Dimension which were regarded as needing some further investigation included 'spiritual and spirituality', 'transcendence', 'baptismal call', and 'vocation'.

Table 2.6   Sample Comparison between Two Documents using Same Dimensions for Framework – Spiritual Dimension

Pastores Dabo Vobis	Co-Workers in the Vineyard
Trait	Element
The human individual is open to transcendence, to the absolute; he has a heart which is restless until it rests in the Lord	Spiritual formation aims to arouse and animate true hunger for holiness, desire for union with the Father through Christ in the Spirit, daily growing in love of God and neighbour in life and ministry, and the practices of prayer and spirituality that foster these attitudes and dispositions.
Living intimately united to Jesus Christ	A Living union with Christ – For lay ecclesial ministers, it is the ground of their ministry
The search for Jesus	Spiritual formation built on the Word of God.

2.7.2.1   Spiritual and Spirituality

O'Meara (1999, p. 231) defined spirituality as a way of seeing life – "spirituality is doctrine in praxis".

The word flows from the term 'spiritual' and McBrien (1994, p. 1019) claimed that "to be *spiritual* means to know, and to live according to the knowledge, that there is more to life than meets the eye". O'Meara reflected that "Life's and love's preferences lead one to select, to arrange, to emphasize a coherent gathering of teachings and images; That cluster, very much one's own, is a spirituality" (p. 232). The process of selection, arrangement and giving emphases comes from one's life experiences and include both formal and informal opportunities to gather such teachings and images. Hence, formation in spirituality, or spiritual formation, occurs from reflection on the life experiences and exposure to learning which nurtures the coherent gathering of teachings and images.

While noting that spirituality is not exclusively Christian, McBrien (1994) described Christian spirituality as

> *trinitarian, Christological, ecclesiological, pneumatological* and *eschatological*. It is rooted in the life of the triune God, centered on Jesus Christ, situated in the Church, ever responsive to the Holy Spirit, and oriented always to the coming of God's Reign in all its fullness at the end of human history. (p. 1020)

He noted that "there is not, and never has been, a single Christian spirituality, nor a single Catholic spirituality" (p. 1021), a position which O'Meara also affirms (p. 232). The plurality of Christian spiritualities reflected the earlier observation of a plurality of approaches in the Church to theology as shown in Section 2.4.

2.7.2.2   Transcendence

The meaning of transcendence was explored by McBrien (1994). McBrien defined the adjective transcendental as "pertaining to that which is above and beyond the ordinary, the concrete, the tangible – i.e., to God" (p. 1253). He referred to Berger's exploration of transcendence which spoke of "phenomena that are to be found within the domain of our 'natural' reality but that appear to point beyond that reality" (Berger, 1969, pp. 65-66, cited by McBrien). Berger identified five signals of transcendence which belong to the ordinary everyday experience. They were our propensity for order, our engagement in play, our unquenchable spirit of hope, our sense of outrage at what is thoroughly evil, and our sense of humour (McBrien, p. 218).

These signs are part of everyday experience and yet do point beyond everyday reality as experienced as individuals and as groups. In bringing individual experience to a group and articulating it in a manner which is agreed to by the group, we are able to look to act in an agreed manner with agreed values. When this happens, the group can be said to have a mission or purpose. Canonical governors need to be aware that their leadership requires an understanding of this concept.

2.7.2.3   Baptismal Call

The baptismal call is a general call to all Christians (Abbott, 1966b n 3) to be engaged in the bringing about of the Kingdom of God in the world. However, an individual may fulfil that call by living an ordinary life and giving witness to the gospel message through their relationships with family, friends and work associates, infused with a belief in the Gospel teachings. But others experience a deeper call or invitation to be involved, using particular gifts with which they are imbued to carry out ministries in the name of the Church (Fox, 2005b; Hagstrom, 2003; Hahnenberg, 2003, 2009).

The basis for this is an expectation that in being baptised as a Christian, there is a responsibility to respond to the baptismal call to engage with the Christian message of the good news of the kingdom of God as expressed in *Lumen Gentium* (Abbott, 1966e, pp., n 31,33). Such an engagement requires belief in the spiritual world and willingness for the people involved to be engaged with the values which have been articulated and are being lived out in the organisation which conducts the ministry in the name of the Catholic Church.

A point of discussion flowing from this response to the baptismal call was whether canonical governors of Catholic ministries needed to be Catholic or whether the baptismal responsibility allowed any Christian to undertake the role. Canonist Sweeney (2011) was of

the view that governors would be practising members of the Catholic Church. However, as the Australian Catholic Bishops, Leaders of Religious Institutes and Catholic Health Australia prepare a "Guide for Understanding the Governance of Catholic Health and Aged Care Services" (Catholic Health Australia, 2011), the statement in the final draft of August, 2011 was somewhat more guarded and stated "It is practically universally held by canonists that one must be a member of the Church before one can hold an office in the Church" (p. 11).

2.7.2.4   Vocation

Vocation implies a particular engagement of the person with a belief that the engagement will involve "work individuals need to do, the inner work which will allow the consciousness of call to grow" (Fox, 2005b, p. 14). The growth in consciousness and awareness of self with implications for the ministry are significant elements of formation for the many roles in ministry and differ from the seeking of a career (Winschel, 2008). Further, "an awareness of vocation often comes 'after the fact'" (Fox, 2005b, p. 13). The "fact" may be provided by planned formation input, or an experience or insight which is formative in itself, but also encourages the person to engage in further formation (Hahnenberg, 2010, p. 73).

For this research, the relevant question was whether engagement in the role of canonical governor is a spiritual encounter that flows from a Christian's baptismal call and expresses itself as a vocation to which the person gives themselves.

2.7.3   Intellectual Dimension

The concepts and terms which lent themselves to further investigation in the Intellectual Dimension included 'theological reflection', 'Word of God', the 'Catholic Intellectual Tradition', and 'missiology'.

Table 2.7   Sample Comparison between Two Documents using Same Dimensions for Framework – Intellectual Dimension

Pastores Dabo Vobis	Co-Workers in the Vineyard
Trait	Element
"If we expect every Christian," the synod fathers write, "to be prepared to make a defence of the faith and to account for the hope that is in us (cf. 1 Pt. 3:15), then all the more should candidates for the priesthood and priests have diligent care of the quality of their intellectual formation in their education and pastoral activity. For the salvation of their brothers and sisters they should seek an ever deeper knowledge of the divine mysteries."	Intellectual formation seeks to develop the lay ecclesial minister's understanding and appreciation of the Catholic faith, which is rooted in God's revelation and embodied in the living tradition of the Church. It consists chiefly of study of the sacred sciences but draws also upon a wide range of other disciplines: philosophy, literature and the arts, psychology, sociology, counselling, medical ethics, culture and language studies, business administration, leadership and organizational development, law, and so on.
Study of theology, the future priest assents to the Word of God, grows in his spiritual life and prepares himself to fulfil his pastoral ministry.	Formation for lay ecclesial ministry is a journey beyond catechesis into theological study Theology delves into the Church's faith in a scholarly way, interpreting it according to the witness of the Scriptures and Tradition and making it understandable to the times.
Human sciences" can be of considerable use, sciences such as sociology, psychology, education, economics and politics, and the science of social communication	

2.7.3.1   Theological Reflection

In Christianity, theological reflection "is the discipline of exploring individual and corporate experience in conversation with the wisdom of a religious heritage" (O'Connell Killen & De Beer, 1994, p. viii). The authors pointed out that, in this sense, one's intellectual formation is said to assist one's faith development. Faith development is about one's relationship with God. Theological reflection is trying to describe this circularity.

The corollary is that the study of theology is not expected to be undertaken as a purely intellectual exercise, but as an engagement in faith. This long tradition in the Church was expressed by St Augustine (354 – 430 CE) as "I believe, in order to understand; and I understand, the better to believe" (Quoted in *Compendium of the Catechism of the Catholic Church*, 2008).

Theological reflection, self-awareness and an understanding of transcendence are inter-related concepts which need to be part of the formation for canonical governors.

2.7.3.2   Word of God

The term "Word of God" is widely used in Jewish and Christian sacred literature. It also has two inter-related meanings for Christians and these are relevant for this research. In its first sense, word of God refers to the sacred tradition and the sacred Scripture which form "one

sacred deposit" of God's revelation to people (Abbott, 1966c, Dei Verbum 10). It also refers to the person of Jesus Christ, given the title with the upper case, Word of God, in whom "the history of the people continues as the history of God's words and God's works, that is, of God's revelation" (G. Kelly, 1998, p. 66).

Kelly (1998, p. 66) made the connection between the two elements stating that, through the Gospel accounts, "we are conscious that the people were gradually becoming aware that in Jesus a new image of God was being revealed to them". From this perspective, the formation of canonical governors views that the person to be formed is a believer in Jesus, has a relationship with Jesus, and is ready to have that belief and relationship nurtured. In other words, the person has 'faith' and is open to engage in deepening their faith.

2.7.3.3   Catholic Intellectual Tradition

In Smart's (1984) phenomenological analysis of world religions, he nominated seven dimensions which are usually found in the range of world religions. Smart named the dimension relevant for this element of the research as the 'doctrinal and philosophical' dimension. He described this as a "systematic formulation of religious teachings in an intellectually coherent form". The Catholic Church has a long history of systematic formulation and intellectual coherence of the basic beliefs (Lennan, 1998; McBrien, 1994). As stated in Section 2.7.3.1, theology is both an intellectual discipline and an articulation of faith by the group of adherents. The intellectual exploration and articulation flow from, and interact with, the experience of more basic dimensions including ritual, story and myth, experience and rules (Smart, 1984).

Grassl (2009) explored the existence of intellectual traditions with particular reference to a Catholic Intellectual Tradition. He identified nine principles which led him to believe that a characteristic of the 'Catholic Intellectual Tradition' was that it gave a priority to ontology over epistemology (p. 8). This means that there is a priority that 'being' is more important than 'knowing'.

The modelling for this priority can be found in the Christian scriptures where the founder, Jesus Christ, acted in healing and teaching without necessarily providing any theorising for the actions. Such example can be found in the cure of the blind man (Mk 8.22-26). The modelling is also seen in parables, epitomised in 'The Good Samaritan' (Lk 10.25-37) which provided the story of the complete stranger and outsider helping the person in need when there was no personal or cultural expectation to do so (Arbuckle, 2007b).

The community of Jesus' followers used the experiences and stories to build a theory that supported such behaviour. This approach supports Grassl's (2009) conclusion that there is a Catholic intellectual tradition which has, as essential elements in the model, "reasonableness, coherence and practical usefulness of its principles" (p. 12).

The two foundations which form the base for theological study are (i) Scripture, which is acknowledged as containing God's revelation of God's self (Kelly, 1998), and communication of God's self, and (ii) Tradition, which is "the living and lived faith of the Church" (McBrien, 1994, p. 63). For the meaning of Tradition in this sense, uppercase is always used to distinguish it from 'traditions' which are "customary ways of doing things related to faith" (McBrien, p. 63). Table 2.1 (Models of Church) and Table 2.2 (3 Types of Theology) are examples of the depth of the Catholic Intellectual Tradition with a range of expressions.

2.7.3.4   Missiology

Section 2.4 dealt with the broad view of the place of theology in canonical governance, and 2.4.1 outlined the particular sub-division of ecclesiology which is relevant to this research. Another sub-division relevant to the research is missiology.

Missiology is defined as a systematic theology of mission (Bevans & Gros, 2009; Bevans & Schroeder, 2004). Missiology is a recent theological discipline that examines the rationale and purposes of the mission of the Church (Kirk, 2000, p. 19). Schroeder (2008) defined the mission as the "proclaiming, serving and witnessing to God's reign of love, salvation and justice" (p. 3). This is the definition of mission taken to apply to this research.

Kirk (2000, p. 21) used the phrase 'Theology of Mission' as a synonym for missiology, and explained that it

> is a disciplined study which deals with questions that arise when people of faith seek to understand and fulfil God's purposes in the world, as these are demonstrated in the ministry of Jesus Christ. It is a critical reflection on attitudes and actions adopted by Christians in pursuit of the missionary mandate. Its task is to validate, correct and establish on better foundations the entire practice of mission.

The relevance of missiology to the research is that it is the study which underpins the meaning of mission which is in common use, sometimes referring to the mission of the Church and sometimes referring to the mission of a particular ministry. Mission is described as the good news in action (Brueggemann, 2000; Schroeder, 2008)

2.7.4 Pastoral Dimension

Consideration of concepts and terms for the Pastoral Dimension allowed for a broader reflection. In writing with 5 years reflection on *Co-Workers*, Fox (2010b), as editor, had the heading "Implications for Pastoral Practice" when introducing the chapters on the Pastoral Dimension (p. 157). Thus, the pastoral is seen as the outcome of the formation or what has been the purpose of the formation.

Table 2.8   Sample Comparison between Two Documents using Same Dimensions for Framework – Pastoral Dimension

Pastores Dabo Vobis	Co-Workers in the Vineyard
Trait	Element
57. The whole formation imparted to candidates for the priesthood aims at preparing them to enter into communion with the charity of Christ the good shepherd. Hence their formation in its different aspects must have a fundamentally pastoral character.	Pastoral formation cultivates the knowledge, attitudes, and skills that directly pertain to effective functioning in the ministry setting and that also pertain to pastoral administration that supports direct ministry.
Like all other branches of formation, pastoral formation develops by means of mature reflection and practical application, and it is rooted in a spirit, which is the hinge of all and the force which stimulates it and makes it develop.	*Pastoral ministry skills.* This skillset includes evangelization; promotion and organization of action on behalf of justice;
It needs to be studied therefore as the true and genuine theological discipline that it is; pastoral or practical theology.	*Effective relationship and communication skills.* Listening to others with skill, understanding and compassion is essential for the lay ecclesial minister. Equally foundational is the ability to speak to others: one on one, in small groups or in large groups, with all in the Church, and with non-Catholics and non-Christians. Lay ecclesial ministers also need to relate effectively with those whom they serve, partners (peers or those they supervise), and supervisors. Recognition and respect for different cultural styles of communication are also needed.
It is a scientific reflection on the Church as she is built up daily, by the power of the Spirit, in history; on the Church as the "universal sacrament of salvation,"(180) as a living sign and instrument of the salvation wrought by Christ through the word, the sacraments and the service of charity.	*Collaboration.* We reaffirm our statement in *Called and Gifted for the Third Millennium* that "the Church's pastoral ministry can be more effective if we become true collaborators."
The study of pastoral theology should throw light upon its practical application through involvement in certain pastoral services which the candidates to the priesthood should carry out, with a necessary progression and always in harmony with their other educational commitments.	*Discernment of the signs of the times.* Lay ecclesial ministers should study and be familiar with current social, economic, political, and cultural situations; reflect on them in light of their doctrinal and spiritual formation;
Awareness of the Church as "communion" will prepare the candidate for the priesthood to carry out his pastoral work with a community spirit, in heartfelt cooperation with the different members of the Church: priests and bishop, diocesan and religious priests, priests and lay people. Such a cooperation presupposes a knowledge and appreciation of the different gifts and charisms, of the diverse vocations and responsibilities which the Spirit offers and entrusts to the members of Christ's body. It demands a living and precise consciousness of one's own identity in the Church and of the identity of others.	*Gift discernment and volunteer ministry management.* Lay ecclesial ministers should help the faithful discern their gifts and charisms, affirm those gifts, and nurture their call to generous service. The secular skills of volunteer management can assist ecclesial ministers in fostering the baptismal call and ministry of all the baptized.
	Leadership and organizational development. Lay ecclesial ministers should cultivate leadership qualities modelled on the example of Jesus so that they can inspire and enable others to fulfil their baptismal calling.

In nominating the Pastoral Dimension as a part of the framework for formation, both Pope John Paul II and the USA Bishops explained the place of pastoral development in preparing people for roles of ministry in the Church.

The whole formation imparted to candidates for the priesthood aims at preparing them to enter into communion with the charity of Christ the good shepherd. Hence their formation in its different aspects must have a fundamentally pastoral character (Pope John Paul II, 1992, 57).

The use of "pastoral" as a term of description flowed from the model of carer which the Founder of Christianity used to describe his role as "carer of His flock" (John 10:11). This concept, in turn, derived from the Jewish writings portraying God as the shepherd of God's people (see Psalm 23, Isaiah 40, Ezekiel 15).

The USA Bishops explained that a 'carer' in this pastoral model for ecclesial ministry required formation to know how to ensure that the ministry functions appropriately. "Pastoral formation cultivates the knowledge, attitudes, and skills that directly pertain to effective functioning in the ministry setting and that also pertain to pastoral administration that supports direct ministry" (United States Conference of Catholic Bishops, 2005). These priorities of knowledge, attitudes and skills for pastoral leadership are reflected in *Lay Ecclesial Ministry* (Fox, 2010b) which is a collection of writings examining the impact of *Co-Workers in the Vineyard of the Lord*.

In *Co-Workers*, the Bishops' quoted Pope John Paul II on the need and responsibility on the Church and individual for formation (USCCB, p. 33):

"To set high standards," said Pope John Paul II, "means both to provide a thorough basic training and to keep it constantly updated. This is a fundamental duty, in order to ensure qualified personnel for the Church's mission."

These words, spoken for catechists (men and women fulfilling a broad range of pastoral duties) in mission lands, apply as well to the lay ecclesial ministers in any setting, including canonical governors. Effective formation methods address the whole person: emotions, imagination, will, heart, and mind. It is the whole person who ministers, so the whole person is the proper subject of formation.

The USA Bishops set out "goals, elements and methods of formation" for each of the headings – human, spiritual, intellectual and pastoral. The research sought to demonstrate that these headings were applicable to the establishment of a formation framework for those lay people being asked to undertake canonical governance of ministries in the Church.

2.7.5 Overview of the Formation Dimensions for Canonical Governance

This exploration of the four dimensions for formation for priesthood and lay ecclesial workers indicated that, while the framework headings or dimensions are the same, the content and depth expected varied considerably. Throughout the documentation, there was an emphasis on the need for a development of a personal spirituality informed by the Scriptures and a theology informed by the Church tradition. The pastoral emphasis varied with the ministry being addressed. However, the framework headings also have a weaving that is crucial for wholeness. A developing intellectual knowledge of Scripture and theology would be expected to influence the personal spirituality and relationship with God and Jesus. This would be expected to flow through to assist the person in shaping the response to the mission of the Kingdom of God for which the organisation exists and to which the person has been called to leadership.

By definition, Catholic ministries operate in the civil sphere as non-profit organisations (Cleary, 2007). By definition, non-profits operate in response to a defined mission (Sachs, 2000). From that, it is essential that leaders of Catholic, non-profit ministries understand and are committed to the mission given to the Church by its Founder, Jesus Christ – the bringing about of the Kingdom of God (Bevans, 2009).

Understanding the place of the Kingdom of God requires an understanding of oneself and the role one has in articulating the cause. Hence, leadership requires an understanding of the mission and providing the capacity to bring the mission about. Winschel (2008) described the difference in what is involved in creating the depth in formation for all levels and what is involved in the development of a career path. He noted that formation begins by recognising a call and being sent (p. 22). This echoed Pope John Paul II on the role of the Laity in *Christifideles Laici* (1988) – "The fundamental objective of the formation of the lay faithful is an ever-clearer discovery of one's vocation and the ever-greater willingness to live it so as to fulfil one's mission".

For this, leaders need an understanding of themselves as well as the mission of the organisation, a personal commitment to the mission and a willingness to articulate and decide for the mission. Senge (1990) had made the claim earlier that these skills and this attitude were necessary for leaders in management to be designers, stewards and teachers (p. 340). This was brought to the governance level, requiring collaboration with the management to achieve the mission (Chait et al., 2005).

2.8   Chapter Summary

In this chapter, the context of change in the Church and the world over the past 50 years was outlined. From this understanding of the context, the literature was reviewed for the research topic.

The literature provided no theoretical framework for formation in past, current or planned models in governance, leadership and spirituality for the new canonical leaders. Much of the literature described how organisations moved, how they cooperated with others, how they came to ensure the mission of the Church in their work; much of it dealt with the work of senior managers rather than governors. While some of the understandings are common, the work and involvement of the delivery of the services are very different from that of governance. The research, therefore, sought to address the lack of a clear set of relevant needs and the lack of a theoretical model for a framework for formation in the field. In Chapter 3, the research design and methodology used for the research will be reported on.

Chapter 3 – Research Design and Methodology

3.1   Introduction

The purpose of this research was to explore formation needs for people undertaking leadership with responsibilities for canonical governance of the ministries in the Catholic Church. The second part of the research was to develop a framework for formation for canonical governance in the light of the needs for formation that have been identified.

The purpose of this chapter is to describe the research design for the study and the methodology used to conduct the research.

3.2   Research Paradigm

A constructivist paradigm was chosen for this research. In this paradigm, Cleary (2007) explained that "realities are understood to be in the form of multiple, intangible mental constructions, socially and experientially based, local and specific in nature and dependent for their form and content on the individual persons or groups holding the constructions" (p. 104). She noted that, in the constructivist paradigm, "the investigator and the investigated are interactively linked so that the 'findings' are literally created as the investigation proceeds" (2007, p. 104). This was borne out in the research when, in the second stage of the data gathering, interviewees reflected on the survey data and these reflections yielded further insights.

This study sought to explore the formation needs for canonical governors. For this research, formation for exercising such responsible canonical governance was explored as a reflective process by which a person's development in the human, spiritual, intellectual and pastoral dimensions provided them with the relevant competence and understanding for the ministry of governance. The development of people in these dimensions fitted Cleary's (2007) description of realities understood in the form of multiple, intangible mental constructs or "meaning systems". The elements which make up the dimensions come out of the local and specific nature of the social realities of the Catholic Church. The study explored changes in that reality.

3.3   Theoretical Perspective

An interpretivist approach was chosen for the theoretical perspective for the study. Candy (1989, pp. 3-5) noted that the interpretive perspective is appropriate for research which deals

with human social systems where events and actions cause other events or circumstances to change.

A theoretical perspective is defined as "the philosophical stance informing the methodology and thus providing a context for the process and grounding its logic and criteria" (Crotty, 1998, p. 3). A specifically interpretivist perspective acknowledges that value-laden experiences shape the social fabric. Thus an interpretivist perspective "looks for culturally derived and historically situated interpretations of the social life-world" (Crotty, p. 67). Interpretivism involves consideration of the assumptions which underpin the methodology adopted.

The interpretivist theoretical perspective comprises a range of elements. Cleary (2007) examined the difficulty of researching religious organisations and created a theoretical framework for analysing religious organisations. Interpretivism acknowledges that culturally derived and historically situated interpretations can alter. This research examined the impact of a change in culture and world view at a particular time in history. In particular, the study researched the formation needs for people in the leadership of that change and in the leadership role in canonical governance. These needs have changed over the past 30 years.

As this study addressed new situations in the Catholic Church from changes in the Church itself and the interaction of the Church with the post-modern world, particularly flowing from the second half of the 20th century, the interpretive perspective was deemed to be appropriate.

3.4 Methodology

Research methodology is the science of studying how research is conducted. It looks at the various steps taken in research and the logic behind them (see Kothari, 2004, p. 8).

This research dealt with social activity and human interaction "which are not governed by inviolable laws so much as agreed rules which are consensually validated by people" (Candy, 1989, p. 4). Darlaston-Jones (2007) contended that because of the constraints of these agreed rules, a constructivist design requires the use of research methodologies "that are able to extract the degree of detail often obscured by the more traditional methods" (pp. 24-25). This framework, using Crotty (1998, p. 5) is summarised in Table 3.1.

Table 3.1 Methodological Framework

Epistemology	Constructivism
Theoretical Perspective	Interpretivism
Research Strategy	Case Study
Data Collection Gathering Techniques	Survey Interviews
Data Analysis	Context Analysis Statistical Analyses Factor Analysis

Case study is a research strategy which focuses on understanding the dynamics present within single settings (Eisenhardt, 1989, p. 534) but allows for multiple sites or cases to collect data for the setting. The multiple site design can normally be expected to be "more powerful and provide more insights" (de Vaus, 2002, p. 227).

The study was a case study because it examined the case of the perceptions of a social unit, namely a range of individuals connected to, members of and/or knowledgeable about formation for canonical governance. The circumstances of the case are that the Church is at a particular time in its history where new forms of governance are being called for, and there are demands concerning the content and process of preparation for individuals to undertake governance roles. These circumstances fit the nature of 'case study' methodology where case study refers to an intensive, holistic description and analysis of the phenomenon being studied (Merriam, 1985, pp. 204-217). In this 'case', the phenomenon is the changing nature of governance in the Church.

Case study is used to provide descriptions, test theory or generate theory (Eisenhardt, 1989, p. 535). In this research, case study was used to explore the needs for, and understanding of, formation for canonical governance and thereby develop a possible framework for formation.

Case study is appropriate when the research involves:

- contemporary phenomena within real life contexts by seeking to convey in-depth understandings of interpretations and meanings being explored (Campbell & Aherns, 1998);

- boundaries and phenomena that are not clearly defined (Yin, 1994);

- responding meaningfully to participants' situations, where life's realities are examined (McLaughlin, 2009); and

- offering rich descriptions of events, contexts and others influences (McLaughlin, 2009).

These conditions were relevant to this research as there is a range of Public Juridic Person structures which could provide data. For example, some Public Juridic Persons have natural persons as members; others have Public Juridic Persons as members with natural persons as representatives. To this point, there has been limited research on members of the emerging Public Juridic Persons.

3.5   Overview of the Research

In summary, the research design for this study included a combination of data gathering strategies, interviewees, and data collection. This is summarised in Table 3.2.

Table 3.2 Overview of Research Design

Research Questions	Data Gathering Strategy	Participants	Data Collection & Analysis
What are the needs in forming individuals for leadership for canonical governance in Public Juridic Persons?	• Design of On-line Survey • Piloting On-line Survey	Input from Expert Panel 12 Persons with Expertise in Governance or Survey Design	
	• On-line Survey	International	Administration of Questionnaire Survey Collation of Survey Responses
	• Semi-structured one-on-one Interviews, both face-to-face and telephone	Australian and USA	Conduct of Interviews
			Coding, Analysis of Interviews Collation
What is an appropriate framework for formation for leadership for canonical governance on the basis of these identified needs?	• On-line Survey	International	
	• Semi-structured one-on-one Interviews, both face-to-face and telephone	Australia and USA	Interviews Conducted Interview audio tapes transcribed
			Coding and Analysis of Interview data

3.6   Data Gathering Strategies

A combination of quantitative and qualitative methods was used for data gathering for the research. A survey provided quantitative data which was used as a basis for semi structured interviews. In a qualitative sense, the intent of the research was "to develop an in-depth exploration of a central phenomenon" (Creswell, 2008, p. 213). At the same time, it was considered important to identify patterns of responses from participants through quantitative means. The aim in the data gathering strategies was to "select people or sites that can best help …understand the central phenomenon" (Creswell, p. 213). This is described by Creswell (2008) as *purposeful sampling* and can be applied to individuals as well as sites. The data gathering strategies therefore involved a combination of survey and interview.

3.7   Survey Design

The survey was designed to create items to test whether nominated traits were regarded as important for canonical governors and whether the traits were in evidence.

The survey used an Array (Flexible Labels – Dual Scale) format. Participants were asked to rate whether 'the nominated traits' were desired using Likert type scales. They were further asked to rate the extent to which they considered the nominated traits to be evident in reality.

The first Likert-type scale of the survey asked respondents to indicate the level of agreement in regard to nominated traits as relevant to canonical governance on a four option response from "Strongly Agree", "Agree" to "Disagree", and "Strongly Disagree" with a further option of "No Answer".

The second Likert-type scale asked respondents the extent to which they perceived the traits to be evident in their experience. This scale had a six option response from "Very High", "High", "Fair", "Low" with options of "Unable to Judge" and "No Answer".

The survey had components covering four dimensions, plus a background section designed to collect demographic information. The dimensions were human, spiritual, intellectual and pastoral. The items relating to the dimensions of formation were constructed to collect data for about desirable background for formation in theology, the understanding of prayer, mission, ministry and law, as well as human competencies and values for the role of canonical governor. Demographic information was sought about the respondents' background and experience in governance, theology, formation, Canon Law, ministry and spirituality and the country from which their experience was based.

The design of the survey enabled data to be gathered in the light of the existing language and frameworks used in Church documents, the key ones being *Pastores Dabo Vobis* and *Co-workers in the Vineyard of the Lord*. It also enabled the fields, other than, but related to, canonical governance and the expertise of the respondents to be recognised.

An Expert Advisory Group was formed to support the researcher with advice from their fields of expertise. It consisted of a theologian and a canonist. Each was a formation practitioner and an academic in their field. Their expertise and advice was of great assistance in shaping the survey technically as well as assisting with the logic and the clarity of the survey items which were created.

Appendix 1 lists the survey questions and documents used as their sources, with additional references from current professionals and reflectors in the field of formation for or involvement with canonical governance. The survey provided responses linked to the possible framework: Human capabilities (12 items), Spiritual capabilities (10 items), Intellectual capabilities (11 items) and Pastoral capabilities (10 items).

3.7.1 On-line Survey

This research used an on-line survey. The advantages of an electronic survey are that "they provide a way to conduct studies when it is impossible or financially unfeasible to access certain populations" (Andrews, Nonnecke, & Preece, 2003) and "they are very cost effective, as the cost per response decreases as sample size increases" (Andrews et al., 2003). These authors further reported that "the results from electronic surveys can be the same as postal survey content results with the advantages of speedy distribution and response cycles" (Andrews et al., 2003). They added that "building sufficient trust for people to participate in surveys requires some level of survey transparency, recognised credibility of researchers, and distribution procedures that attempt not to offend or intrude inappropriately" (Andrews et al., 2003).

The use of an online survey was suited to this study because of the geographical spread of possible international participants and the limited field of respondents because of the expertise expected. The survey allowed the researcher to send the questionnaire to more than 100 participants and increased the likelihood of an adequate return rate. This in turn assisted in the development of an appropriate questionnaire for the second stage of the data collection, which was the one-on-one interview.

The electronic survey allowed *snowball sampling* to be used. Snowball sampling "is a form of purposeful sampling that typically proceeds after a study begins and occurs when the researcher asks participants to recommend other individuals to study" (Creswell, 2008, p. 217).

The particular electronic instrument used for the online survey was LimeSurvey (LimeSurvey, 2010) which is licensed to Australian Catholic University. The university provided instruction and guidance in the design and use of the instrument as well as the secure storage of returns.

3.7.2 Feedback from Pilot Survey

A pilot group of 12 participants was used to test the survey instrument and refinements were made on the basis of the responses received.

The feedback from participants in the pilot study confirmed that the survey could be completed in 15-20 minutes.

Pilot respondents pointed out that one scale ranged from "high" to "low" ("Strongly Agree" to "Strongly Disagree") while the other scale ranged from "low" to "high" ("Low" to

"Very High") and recommended that both scales range from the supportive response downwards. This adjustment was made.

Respondents noted that two items invited responses to more than one issue (double-barrelled) in the same item and this was corrected.

3.8   Interviewing

The survey data was used to shape the second data collection strategy which was semi-structured one-on-one interviews.

The advantage of semi-structured one-on-one interviewing (including open-ended response) is that "allows the participant to create the options for responding" (Creswell, 2008, p. 225). This was important in this research as the informed participants came from a range of backgrounds in the development and delivery of formation programs. These backgrounds included theology, spirituality, leadership, governance, Canon Law, civil law and human resources. Their perspectives might be expected to provide responses which highlighted different emphases in the nature of formation and formation needs for canonical governance.

Another advantage of the semi-structured one-on-one interview was that it allowed for the provision in the interview of operational definitions which sought and provided clarifications which developed a shared understanding before a response was given.

Creswell (2008, p. 226) noted that disadvantages of the interview as a research tool include the interviewer's filtering which could see the researcher summarising the interviewee's responses in the research report selectively omitting significant views which might have been expressed but do not support the claims of the research. To attempt to address this concern, the researcher provided interviewees with a transcript of the interview to ensure that they could see that they had been reported correctly and they were able to make any changes and clarifications they thought necessary. The reporting in Chapters 5 and 6 uses data of different interviewees which expresses opposite points of view on particular topics, indicating that the researcher attempted to be faithful to the interview data.

There is also the danger of the interviewee making efforts to provide an answer which they think the interviewer wants to hear. To address this concern, the researcher made it clear to interviewees that their reflections were being sought.

While these possible disadvantages were noted in determining the validity of the data, the interview process looked to engage participants who were expected to be adult professionals,

most with doctorates in their field of expertise. This process with these participants was expected to minimise biases of the researcher.

3.9   Interviewees

Since purposeful sampling was being used (Creswell, 2008), persons with expertise in and involvement with existing or planned Public Juridic Persons were sought as key interviewees. Many had published on aspects of the topic and the works of some have been cited in this study. Often their writings outlined their experience of development towards new forms of canonical governance for the new Public Juridic Persons in organisations they had been associated with for periods of up to 20 years.

Interviewees selected for the current research were professionals in the fields of Canon Law, theology, spirituality, governance and formation or leaders of existing Public Juridic Persons. The number of possible interviewees for this topic of research was limited. The people who were selected as interviewees provided a purposeful sample where "researchers intentionally select individuals and sites to learn or understand the central phenomenon" (Creswell, 2008, p. 214). These interviewees had been involved in developing formation programs and facilitating their provision to existing and potential canonical governors.

3.9.1   Anonymity and Confidentiality

Confidentiality of the participants was protected to ensure meaningful information, as per the dicta "the lives and experiences of participants should be told, but the individuals from which the research was gleaned must be concealed" (Creswell, 2008, p. 240). Anonymity means that "the researcher will not and cannot identify the respondent" (de Vaus, 2002, p. 62). In this research, the survey respondents could be identified by the researcher as they replied by email and email addresses became part of the record keeping in LimeSurvey. The anonymity of those undertaking the survey was protected by LimeSurvey's system of separating the data responses from the fields of respondents, called "Token Management". Only non-identifiable elements became part of the exported data from the survey data base.

Confidentiality means that "the researcher can match names with responses but ensures that no-one else will have access to them" (de Vaus, p. 62). The confidentiality of the interview data was maintained through the same method as that which ensured anonymity outlined above.

To ensure confidentiality from audio recordings of interviews, only transcribed versions of the interviews were used. Confidentiality of interviewee data was protected through

confidential storage and with access to the data base limited to the researcher and his supervisor in accordance with the ethics requirements.

3.9.2   Development of Interview Instrument

The interview instrument was developed with two sections. The first invited interviewees to evaluate a definition for formation. For the second section, interviewees were provided with a selection of the survey data responses and invited to provide comment and feedback on the data.

In Chapter 2, the difficulty of finding a definition of formation was noted. On the basis of available literature, the researcher composed a definition for formation of persons for canonical governance as follows:

> *a reflected development on one's gifts and how they contribute to the need in hand providing an holistic preparation of a person for a role – human, spiritual, intellectual, pastoral – including reflection on the experiences of their own life which might highlight some lacks in development or knowledge that are essential for that need.*

This definition was made part of the Interview Instrument and interviewees were invited to reflect and respond on the "reasonableness" of the wording for a definition for the research.

A selection of 19 items from the survey data and their responses was provided to the interviewees as well as the definition of formation outlined above. 3 items were taken from the Human Dimension, six from the Spiritual Dimension, six from the Intellectual and four from the Pastoral Dimension. A summary of the responses to the 43 items was also provided (see Appendix 2). A selection of items was made as it was considered that it was not possible to elicit responses to all the 43 items in an appropriate interview timeframe. Instead, items were chosen on the basis of their face validity as areas and/or issues for further clarification and interpretation. For example, the Human items focussed human qualities – justice, compassion and respect. The Spiritual items deliberately included baptismal call, vocation, elements of spiritual formation and identification with Church. The Intellectual items sought response to formal elements in the study of theology in the light of faith. The Pastoral items focussed on the understanding of the ministries being governed as elements of the mission of the Church.

The Interview Instrument was provided to the interviewees after they had agreed to be interviewed but well before the interview. They were also provided with a list of questions

which would provide a framework for a semi-structured interview. Through this documentation, the researcher sought their responses and reflections to the survey results and the definition of formation. The interviews were, with permission, recorded for later transcription. The interview instrument and questions are in Appendix 7

The mean responses for each item were calculated.

3.10 Analysis of Data

Data analysis involves systematically searching and arranging interview transcripts, field notes and other collected materials to enable the researcher to arrive at findings (Bogdan & Biklen, 2007). Once collated, data analysis "involves working with the data, organising them, breaking them into manageable units. Coding them, synthesizing them, and searching for patterns" (Bogdan & Biklen, p. 159). It entails taking the raw data collected and seeking to elicit the theoretical concepts which might be contained in them in view of the researcher's intended outcome (Lichtman, 2006, p. 168).

The survey data was collated by the LimeSurvey Program and provided the data which was exported to spreadsheets where it was statistically analysed. While the study was principally a qualitative one, the survey data provided useful information which allowed for some statistical analysis.

The data was tested for statistical significance using the t-Test (Field, 2000, pp. 239-241) and subjected to Factor Analysis to seek possible relationships (Field, 2000, Chp 11). Cronbach's alpha coefficient was calculated to provide evidence of the reliability of the survey data.

The interviews were audio recorded and transcribed. Coding was done and a scheme was created for grouping the data. The boundaries of the research, the specificity of the field under research, the limited number of sites, and the fact that the data are from experts in the field are key elements in delimiting the research field and the data to be analysed.

The data analysis process entailed transcribing the interviews and establishing relevant broad codes and patterns in NVivo (*NVivo 8 Fundamentals*, 2008). Themes emerging from this coding and these patterns were based on groupings from the factor analysis.

3.11 Verification: Validity and Reliability

Verification is the provision of evidence that the findings are reliable and valid from the points of view of the research method used and the interpretations and claims that follow (Bush, 2007).

Bush (2007, p. 102) addressed the issue of validity as the capacity to answer the question "Has the researcher gained full access to the knowledge and meaning of informants?".

Validity in this research relied on the quality of the items in the survey and the questions in the interviews. The fact that informants involved in the research had expertise in the field provided a presumption of validity, in that, if the questions were initially poorly phrased, the researcher would expect to have any shortcomings pointed out very quickly by the interviewees. The validity of the data in the survey was able to be tested via factor analysis.

Bush (2007) addressed the issue of reliability as the capacity for replicability. In this study, the reliability refers to the question "Would similar survey and interviewee responses be obtained by different researchers from interviewees with the same level of expertise on different occasions?"

Given the newness of the field, it is possible that the interviewees' involvement and reflection on this research might see them change their views by the time further research is done. Arbuckle (1993, 1995, 2000, 2007a) has written over the last twenty years of the changes in the Church and their implications, particularly for health care and in the light of an understanding of the mission of the Church.

Thus a change of results at a future time should not be taken to imply that the results of this research are not reliable according to this definition of similar observations at a later time. Some interviewees changed their responses in the interviews in the light of their further reflection.

The reliability of the survey data was able to be tested using Cronbach's alpha coefficient.

Triangulation was provided by the participants reviewing a transcript of the interview and the interpretations with a right to correct any possible misunderstandings in their responses. Hence the triangulation was provided by documentation, survey items, questions in interviews and checking in this survey (Bush, 2007).

3.12 Ethical Issues

Punch (cited in Berg, 2004, p. 43) noted on the matter of research ethics that the concerns "revolve around various issues of harm, consent, privacy and confidentiality of data". The

research protocols of the university required the approval of the ACU Human Research Ethics Committee before the research could be undertaken. The approval was granted (Register No. N2010 19 – Appendix 3) and the project was classified by the committee as being of 'low risk'.

Email letters were sent to prospective participants for the on-line survey, outlining the research and its purpose, and inviting them to participate in an on-line questionnaire survey (Appendix 4). They were assured of the confidentiality of the responses.

Letters were sent to prospective interviewees, inviting them to participate in a semi-structured, face-to-face or telephone interview (Appendix 5). The letters outlined the research and its purpose, inviting them to participate in the interview for a maximum time of an hour, assuring them of anonymity and informing them of their right to withdraw from the research at any time. Most of the participants held doctorates in fields such as theology, Canon law or education or are involved in the public leadership of ministries. The questions were based on publicly available documents. No situations of a conflict of interest were envisioned, or were raised during the study.

The data were stored in accordance with Australian Catholic University Guidelines on data storage. The identity of the participants was concealed by a system which gave anonymity, and transcripts of audio tapes were used to prevent voice identification.

3.13 Chapter Summary

In this chapter, the research design has been outlined, as well as the methods used to design the survey instrument and the design of the interview instrument. The requirements of the ethical considerations have also been addressed. Chapters 4 to 6 will report on the analysis of the data. Chapter 4 will report of the quantitative results and Chapters 5 and 6 on the qualitative data.

Chapter 4 – Investigating Traits of Canonical Governors

4.1 Introduction

This chapter reports the statistical analysis of the survey data. Data were analysed using the Statistical Package for Social Science (**SPSS**) (Field, 2000). Paired sample t-tests were conducted to test for statistically significant differences between groups (e.g., Desirable vs. Perceived). For the sake of organisation, the "No Answer" in the Desirable Traits and "No Answer" or "Unable to Judge" in "Perceived Traits" were omitted from the tables in this section.

4.2 Survey

The survey sought to assess the needs for formation for canonical governance by providing a framework within which the desirable traits for forming individuals for canonical governance could be compared to actual current practice. The survey items explored two key areas, namely (i) the purpose of formation for people for the ministry of canonical governance (Bouchard, 2008), and (ii) the useful or necessary background for formation for people to be involved in canonical governance (Eck & Morris, 2005b).

Ethical approval was obtained from the Australian Catholic University Human Research Ethics Committee (Register No. N2010 19) before the research was undertaken. The approval was granted prior to distribution of either the pilot or main survey. Participant confidentiality was ensured and participant identities were not used or reported in any of the data analysis. The survey was designed and distribute using LimeSurvey® (LimeSurvey, 2010), an open-source, on-line survey application. LimeSurvey® has a built-in option for respondents to confirm their willingness to participate prior to being allowed access to the survey, ensuring willing participation and ethics compliance.

4.2.1 Survey Structure

Prior to undertaking the main survey, a pilot survey was conducted with 12 people selected on the basis of their experiences with survey design and canonical governance. The pilot survey allowed clarification of the language and purpose of the survey items and improved the overall layout of the survey document. As described in Chapter 3, the main survey finally distributed to participants comprised 43 items divided into 4 Dimensions: Human, Spiritual, Intellectual, and Pastoral.

4.2.2 Survey Distribution and Analysis

The survey was open from 13th May to 9th June, 2010. The survey was e-mailed to 105 people with the invitation to respond. Using the snowballing technique, a number of recipients forwarded the email with the survey to others whom they thought might have an interest and expertise on the topic of the research. A total of 54 people responded directly to the 105 initial emails. A further 38 responses were received from people to whom the email had been forwarded, giving a total of 92 responses. The Items and their responses are set out in Appendix 2.

4.3 Demographics

Demographic information for respondents is presented in Tables 4.1- 4.6. There was a relatively even spread of female (43) and male (49) respondents and respondents filled multiple roles in Church ministries with wide and diverse experience in the area of canonical governance and related ministry (Table 4.1, Table 4.2). Over 90% of respondents had been involved with aspects of canonical governance in their roles and some respondents had been involved with more than one Public Juridic Person (Table 4.3) as formators, theologians and canonists. Others occupied leadership roles in one Public Juridic Person and canonical roles in another. Over 60% of respondents had been involved for 10 years or more (Table 4.4), highlighting the significant experience of the people responding to the survey and their awareness of the area of concern. It should be noted that all the respondents were from Western countries, primarily Australia and the United States of America (Table 4.5).

Table 4.1   Ministry Roles of Respondents (*N* = 92)

Role in Ministry	*N*	*%*
Member of a Religious Institute	48	52.17
Board Member of a Ministry	47	51.09
Involved in Formation for Public Juridic Person/Sponsorship	41	44.57
Leadership position in a Religious Institute	33	35.87
Member of Trustees	27	29.35
Member of Public Juridic Person	24	26.09
Senior Manager in a Ministry	17	18.48
Representative of Public Juridic Person	14	15.22
Theologian	12	13.04
Canonist	9	9.78

Table 4.2   Role of Respondents in Church (*N* = 92)

Role of Respondents in Church	N	%
Religious Sister	33	35.87
Lay person not a member of a Religious Institute	27	29.35
Religious Brother	19	20.65
Religious Priest	5	5.43
Priest	4	4.35
Bishop	2	2.17
No answer	2	2.17

Table 4.3   Type of Respondents' Involvement with Public Juridic Persons (*N* = 92)

Type of Involvement with Public Juridic Persons	N	%
Involvement with a number of Juridic Persons	53	57.91
Involvement with one Juridic Person	30	32.61
Neither	8	8.70

Table 4.4   Experience of Respondents with Public Juridic Persons (*N* = 92)

Experience and Length of Involvement with Public Juridic Persons	N	%
> 25 years	15	35.87
16 – 25 years	9	5.43
11 – 15 years	15	20.65
6 – 10 years	18	4.35
1 – 5 years	28	29.35
< 1 year	2	2.17
No answer	5	2.17

Table 4.5   Respondents by Country (*N* = 92)

Respondents by Country	N	%
Australia	54	58.70
United States of America	27	29.35
Canada	4	4.35
Ireland	2	2.17
Italy/Vatican	2	2.17
New Zealand	1	1.09
England	1	1.09
No answer	1	1.09

4.4   Survey Responses to Traits for Proposed Framework for Formation of Canonical Governors

Initial validation of the survey items was established by evaluating the distribution of respondents who answered "Strongly Agree" or "Agree" to survey items. As demonstrated in Figure 4.1, between 80 and 89 respondents were in agreement with 31 of the 43 survey items related to the Desirable Traits for canonical governors. This strong response for the Desirable Traits supports the research questions (i) in determining needs for formation of canonical governors and (ii) in supporting the elements of the proposed framework for formation, namely, the four dimensions.

Overall, the respondents answered "Agree" or "Strongly Agree" for 91% of the items in the Desirable category. In the Perceived category, respondents answered "Very High" or "High" for 52% of the all items. This indicated a consistent engagement by respondents in the survey.
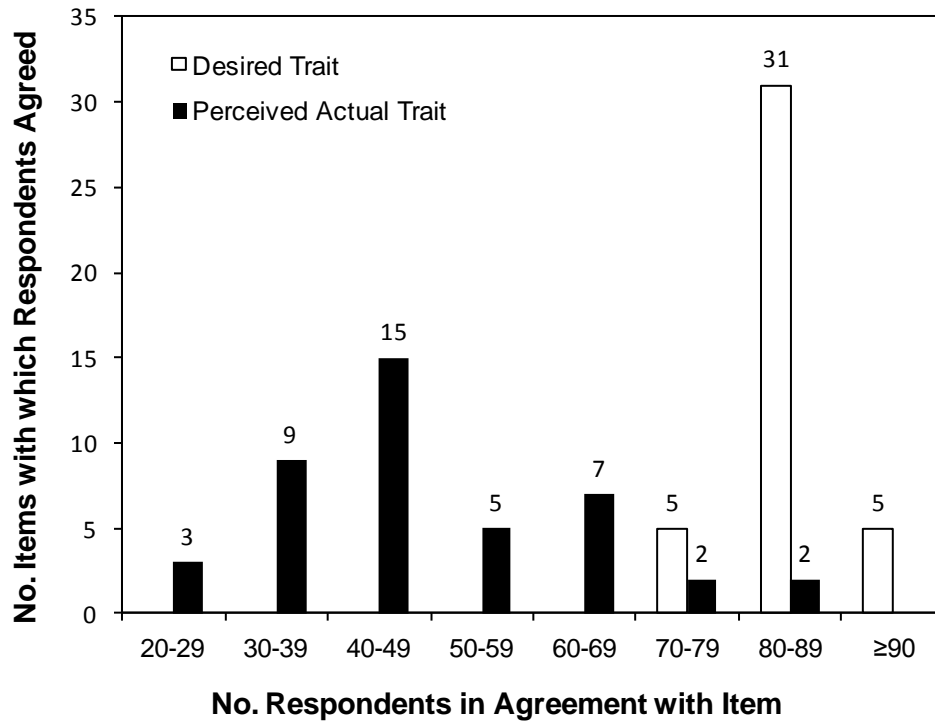
Figure 4.1 Distribution of Participant Agreement ("Strongly Agree" or "Agree") with all 43 Survey Items

The other significant outcome of this initial evaluation was the clear segregation between Desirable Traits and the Perceived Actual Traits in current canonical governors. This disparity was observed in each of the four separate dimensions (Human, Spiritual, Intellectual and Pastoral; Figures 4.2). The disparity did not come from an over-representation in one particular dimension. The disparity between desirable and perceived traits provided compelling evidence for a belief that the formation needs are not currently being met.
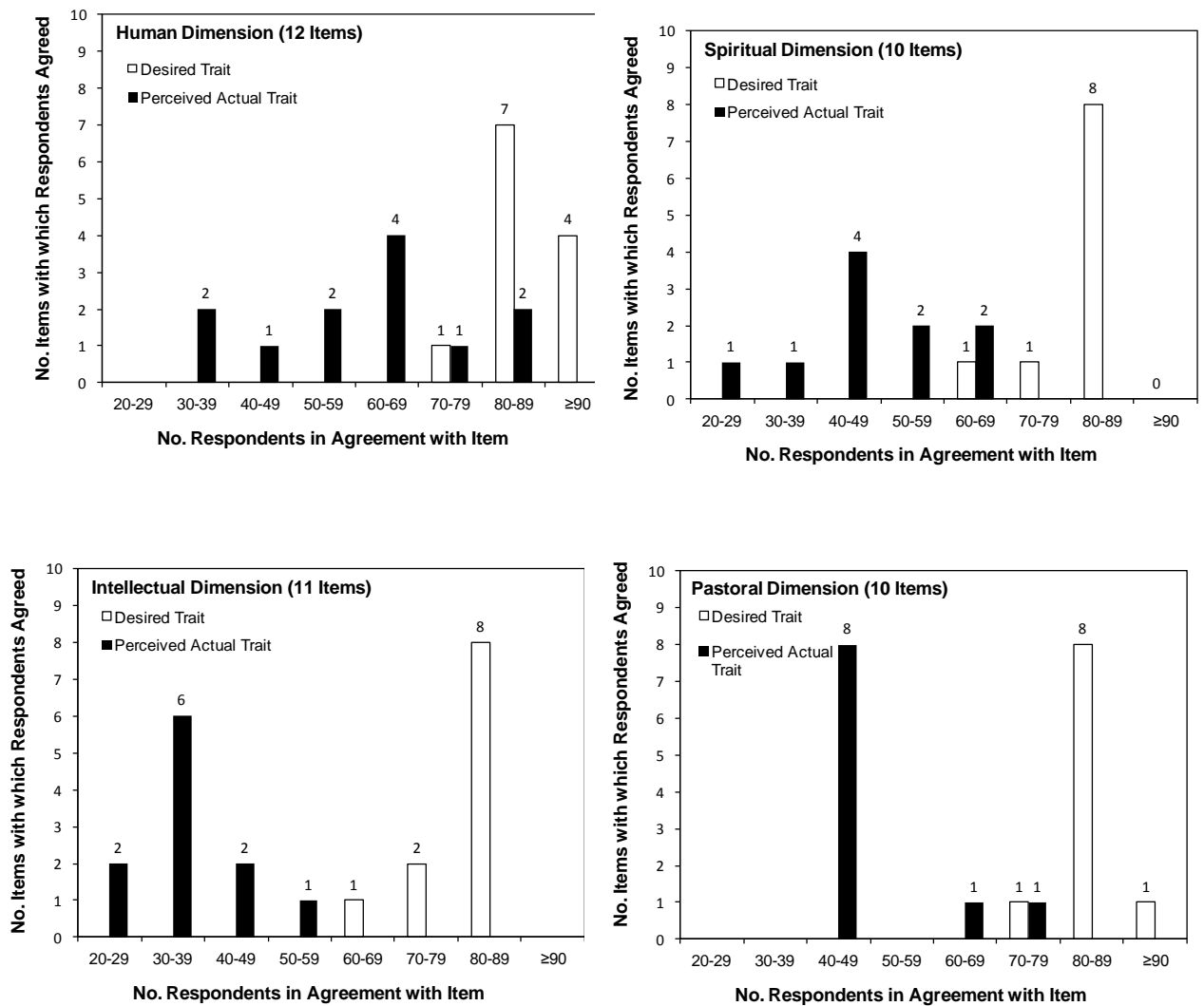
Figure 4.2   Distribution of Participant Agreement ("Strongly Agree" or "Agree") with Items in the 4 Dimensions

4.4.1   Reporting on Survey Responses to Traits in Human Dimension

The differences observed between Desirable and Perceived Actual Traits in the Human Dimension in canonical governors are elaborated in Table 4.6. The highest rating in the Desirable Human Dimension was afforded to the item that "Canonical governors are people of integrity". This also had the lowest of any Perceived score in the 43 items. 11 of the 12 items in Human Dimension had statistically significant differences.

Table 4.6   Means Responses for Human Dimension

Human Items	Mean ±SD Response[a]		Difference (95% CI)
	Desirable	**Perceived**	**Desirable-Perceived**
Are people of integrity	3.88±0.37	1.70±0.75	2.17 (1.98-2.36)*
Possess a deep sense of justice	3.66±0.50	2.18±0.77	1.48 (1.27-1.68)*
Possess well-developed personal maturity	3.69±0.47	2.17±0.87	1.52 (1.30-1.74)*
Exhibit balance in judgement	3.55±0.57	2.25±1.04	1.30 (1.01-1.58)*
Show a genuine concern for others	3.61±0.51	2.00±0.65	1.61 (1.39-1.83)*
Respect every person	3.67±0.50	2.24±0.73	1.43 (1.24-1.63)*
Are genuinely compassionate	3.46±0.59	2.72±1.07	0.74 (0.46-1.03)*
Demonstrate self-knowledge	3.60±0.58	2.31±0.87	1.29 (1.05-1.53)*
Exhibit balance in behaviour	3.25±0.58	2.55±0.96	0.69 (0.42-0.97)*
Demonstrate an ability to learn from criticism	2.96±0.59	2.88±1.09	0.08 (-0.23-0.39)
Are aware of their gifts	3.41±0.52	2.33±0.70	1.08 (0.88-1.29)*
Demonstrate an ability to learn from praise	3.29±0.57	2.86±0.96	0.43 (0.15-0.71)*

[a]As described in Chapter 3, respondents were asked to rate each item from 1-5 with 1 being "Strongly Disagree" and 5 being "Strongly Agree"
*Significantly different (P<0.005) as determined by 2-tailed t-test

4.4.2   Reporting on Survey Responses to Traits in Spiritual Dimension

The differences observed between Desirable and Perceived Actual Traits in the Spiritual Dimension in canonical governors are elaborated in Table 4.7. The highest rating in the Desirable Spiritual Dimension was that canonical governors are committed to the mission of the Church. 9 of the 10 items in Spiritual Dimension had statistically significant differences.

Table 4.7   Means Responses for Spiritual Dimension

Spiritual Items	Mean ±SD Response[a]		Difference (95% CI)
	Desirable	**Perceived**	**Desirable-Perceived**
Are committed to the mission of the Church	3.70±0.51	2.24±0.99	1.47 (1.21-1.73)*
Understand their baptismal call to mission	3.59±0.52	2.27±0.96	1.32 (1.08-1.56)*
View their role as a ministry of governance	3.59±0.56	2.54±1.19	1.05 (0.73-1.37)*
Are aware that spiritual formation requires individuals to be open to the transcendent	3.64±0.55	2.13±0.89	1.51 (1.26-1.75)*
Have a sense of vocation to the role	3.40±0.64	2.63±1.02	0.77 (0.49-1.06)*
Are aware that spiritual formation aims for a daily growing in love of God and neighbour	3.68±0.56	2.02±0.91	1.66 (1.39-1.93)*
Are aware that spiritual formation involves the practices of prayer and spirituality that foster these (above) attitudes and dispositions	3.45±0.57	2.61±1.10	0.84 (0.55-1.13)*
Enjoy a public identification with the Catholic ecclesial community expressed in a variety of ways	2.99±0.76	3.07±0.93	-0.08 (-0.36-0.19)
Understand that spiritual formation is about living intimately united to the Word of God	3.33±0.71	2.55±1.08	0.78 (0.46-1.11)*
Understand that they are a bridge for people to Christ	3.49±0.61	2.45±1.10	1.05 (0.76-1.34)*

[a]As described in Chapter 3, respondents were asked to rate each item from 1-5 with 1 being "Strongly Disagree" and 5 being "Strongly Agree"
*Significantly different (P<0.005) as determined by 2-tailed t-test

4.4.3 Reporting on Survey Responses to Traits in Intellectual Dimension

The differences observed between Desirable and Perceived Actual Traits in the Intellectual Dimension in canonical governors are elaborated in Table 4.8. The highest rating in Intellectual Dimension for desirable trait was that canonical governors need to have some background in missiology. Eight of the 11 items in Intellectual Dimension had statistically significant differences.

Table 4.8   Means Responses for Intellectual Dimension

Intellectual Items	Mean ±SD Response[a]		Difference (95% CI)
	Desirable	Perceived	Desirable-Perceived
Have a sound knowledge of Catholic social teaching	3.48±0.57	2.49±1.01	0.99 (0.71-1.27)*
Understand that the Catholic faith is rooted in God's revelation	3.47±0.57	2.44±0.96	1.02 (0.75-1.29)*
Are aware that formation for ecclesial ministry is a journey beyond catechesis into theological reflection	3.44±0.68	2.70±1.14	0.74 (0.42-1.05)*
Understand that the Catholic faith is embodied in the living tradition of the Church	3.13±0.72	3.11±1.01	0.02 (-0.25-0.29)
Are able to articulate the missiology which underpins the operation of the ministry	3.31±0.67	2.94±0.95	0.36 (0.10-0.63)*
Use theology to help understand the needs of the time in the light of Scripture and Tradition	3.14±0.70	3.11±0.89	0.02 (-0.23-0.28)
Seek to develop their appreciation of the Catholic Faith through intellectual formation	3.40±0.62	2.95±0.96	0.44 (0.16-0.72)*
Need to have some background in ecclesiology	3.31±0.63	2.99±1.09	0.32 (0.03-0.61)[§]
Need to have some background in missiology	3.50±0.64	2.55±0.90	0.96 (0.70-1.21)*
Need to have some background in Canon Law	2.89±0.56	3.00±1.04	-0.11 (-0.41-0.19)
Have a sound knowledge of the Catechism of the Catholic Church	3.29±0.57	2.74±0.93	0.55 (0.30-0.79)*

[a]As described in Chapter 3, respondents were asked to rate each item from 1-5 with 1 being "Strongly Disagree" and 5 being "Strongly Agree"
*Significantly different (p<0.005) as determined by 2-tailed t-test
[§] Significantly different (p<0.05) as determined by 2-tailed t-test

4.4.4 Reporting on Survey Responses to Traits in Pastoral Dimension

The differences observed between Desirable and Perceived Actual Traits in the Pastoral Dimension in canonical governors are elaborated in Table 4.9. The highest rating in Pastoral Dimension was that canonical governors understand their responsibility for the ongoing Catholic identity of the ministry. All 10 items in Pastoral Dimension had statistically significant differences.

Table 4.9 Means of Items for Pastoral Dimension

Pastoral Items	Mean ±SD Response[a]		Difference (95% CI)
	Desirable	Perceived	Desirable-Perceived
Understand their responsibility for the ongoing Catholic identity of the ministry	3.76±0.46	1.94±0.76	1.81 (1.59-2.03)*
Have an understanding of the ministry they lead	3.73±0.52	1.92±0.84	1.81 (1.58-2.04)*
Have an appropriate way of calling those leading the operation of the ministry to account	3.57±0.58	2.43±0.94	1.15 (0.89-1.41)*
Work together to discern the signs of the times for the mission of the Church	3.60±0.60	2.56±0.99	1.03 (0.77-1.30)*
Inspire communal purpose and vision	3.51±0.61	2.57±0.99	0.93 (0.65-1.21)*
Understand that they have a responsibility for the spiritual life of the ministries	3.48±0.63	2.63±1.05	0.85 (0.56-1.14)*
Use mission-based criteria in forming future governors	3.31±0.65	2.56±0.95	0.75 (0.49-1.01)*
Understand the responsibilities of the local Bishop for the coordination of ministerial services in the diocese	3.48±0.61	2.52±0.91	0.97 (0.71-1.22)*
Use mission-based criteria in selecting future governors	3.55±0.64	2.47±0.91	1.08 (0.81-1.35)*
Understand organisational systems and dynamics	3.45±0.68	2.51±1.07	0.94 (0.64-1.24)*

[a]As described in Chapter 3, respondents were asked to rate each item from 1-5 with 1 being "Strongly Disagree" and 5 being "Strongly Agree"
*Significantly different ($P<0.005$) as determined by 2-tailed t-test

4.4.5 Similarities and Differences among Survey Respondent Groups

Statistical comparisons were also conducted to determine whether there were significant differences in responses of the different demographic groups. Items where statistically significant differences were observed are reported in Table 4.10.

Table 4.10 Differences between Demographic Groups

Item[a]	Mean ±SD Response		Difference (95% CI)
GENDER	**Fem (43)**	**Male (49)**	**Fem-Male**
Deep Sense of Justice (H, D)	3.81±0.40	3.60±0.49	0.21 (0.02, 0.39)*
Respect every Person (H, D)	3.76±0.49	3.47±0.62	0.29 (0.06, 0.52)*
Selecting Future Governors (P, D)	3.62±0.71	3.30±0.63	0.31 (0.02, 0.60)*
Selecting Future Governors (P, Pd)	2.25±1.06	2.73±1.03	-0.48 (-0.93, -0.03)*
Formation is a Journey Beyond Catechesis to Theological Reflection (I, Pd)	2.42±1.13	2.94±1.11	-0.51 (-0.99,-0.03)*
LAY vs. CLERICS & RELIGIOUS	**Lay (27)**	**Clerics & Religious (63)**	**Lay-Rel**
Balance in Judgement (H, Pd)	2.48±0.92	2.07±0.68	0.41 (0.002, 0.83)*
Articulate Missiology for Mission (P, D)	3.62±0.57	3.33±0.63	0.29 (0.004, 0.57)*
COUNTRY OF RESPONDENT	**AUS (54)**	**USA (25)**	**AUS-USA**
Ministry of Governance (S, Pd)	2.30±0.91	1.85±0.78	0.46 (0.04, 0.87)*
Journey to Theological Reflection (I, Pd)	2.94±1.16	2.32±1.07	0.62 (0.07, 1.17)*
Knowledge of Catholic Social Teaching (I, Pd)	2.70±0.91	2.20±0.87	0.50 (0.07, 0.93)*
Forming Future Governors (P, Pd)	2.83±1.06	2.25±0.99	0.58 (0.07, 1.09)*
ONE OR MORE PJPS	**More (53)**	**One (30)**	**More-One**
Balance in Judgement (H, D)	3.83±0.38	3.55±0.51	0.28 (0.04, 0.51)*
Concern for Others (H, D)	3.79±0.41	3.50±0.51	0.29 (0.05, 0.54)*
Personal Maturity (H, D)	3.86±0.35	3.59±0.50	0.28 (0.05, 0.50)*
Learn from Praise (H, D)	3.17±0.54	2.82±0.61	0.35 (0.05, 0.66)*
Committed to Mission of Church (S, D)	3.83±0.38	3.55±0.57	0.28 (0.02, 0.53)*
Identification with Ecclesial Community (S, D)	3.55±0.57	3.03±0.82	0.52 (0.14, 0.89)*
Faith Embodied in Living Tradition (I, D)	3.66±0.48	3.24±0.64	0.41 (0.12, 0.71)*
Journey to Theological Reflection (I, D)	3.66±0.55	3.34±0.61	0.31 (0.00, 0.62)*
Understand the Ministry (P, D)	3.93±0.26	3.62±0.49	0.31 (0.10, 0.52)*
Understand Responsibility for Catholic Identity (P, D)	3.89±0.32	3.59±0.50	0.31 (0.08, 0.53)*
Understand Organisational Systems and Dynamics (P, D)	3.48±0.57	3.18±0.55	0.30 (0.01, 0.60)*

[a] H = Human S = Spiritual I= Intellectual P = Pastoral and D = Desirable Pd =Perceived)
*Significantly different (P<0.05) as determined by 2-tailed t-test (Appendix 8)

4.5   Factor Identification and Analysis

Factor analysis was undertaken to explore the nature of any underlying constructs or factors associated with the respondents' ratings of particular items. This was done in order to identify any patterns in responses and thereby make possible the grouping of items and the comparisons of any groupings with the original four dimensions of the formation framework.

Factor Analysis for the Human, Spiritual and Pastoral dimensions each provided two factors in the Desirable and Perceived Human Traits with high scores in Cronbach's Alpha (Field, 2000) (Tables 4.11-4.13). Analysis of the Intellectual Dimension identified only one factor (Table 4.14). The factors in each dimension were classified as described in Figure 4.3

and used in Chapters 5 and 6 as a basis for the analysis of the interview data. In the Human Dimension, the factors were nominated as "Human Maturity" and "Self-awareness"; in the Spiritual Dimension as "Sense of Call to the Role of Canonical Governor" and "Call to Spirituality"; in the Intellectual Dimension "Catholic Intellectual Tradition"; and Pastoral Dimension, "Catholic Identity and Mission" and Formation for Canonical Governance".
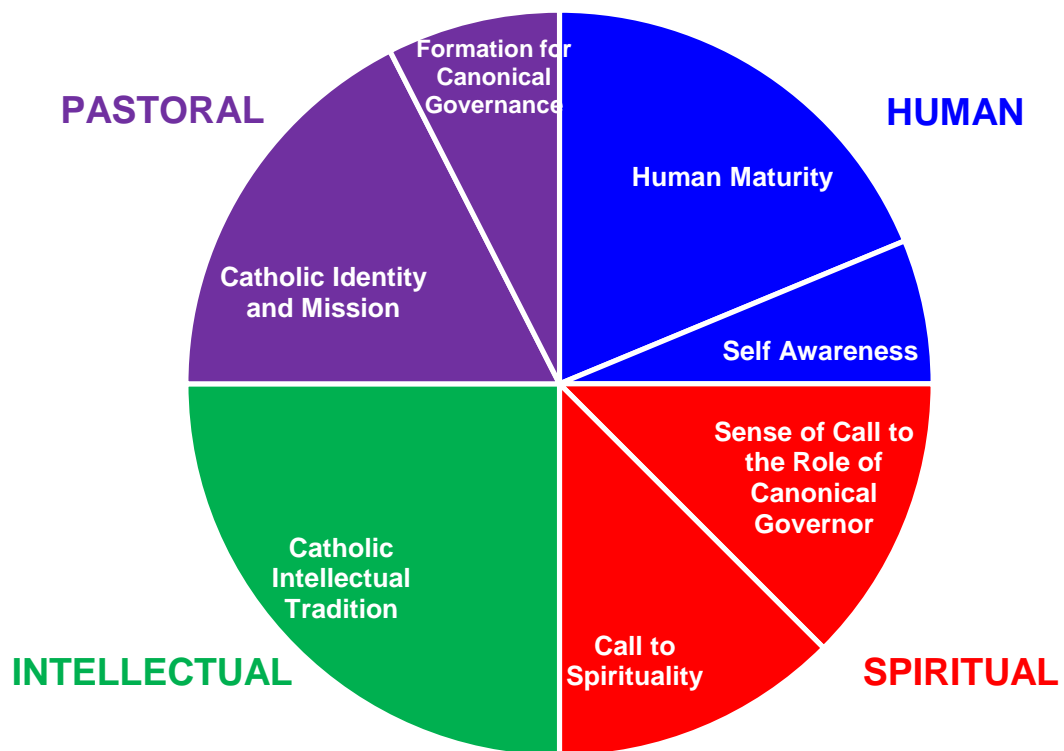
Figure 4.3 Factors Identified in each Dimension

Table 4.11 Factor Analysis Human Dimension Traits

Human Item	Factors for Indicated Component*			
	Desirable		Perceived	
	1[a]	2[b]	1[c]	2[d]
People of Integrity	.450	.276	.707	.141
Balance in Judgement	.808	.208	.613	.168
Deep Sense of Justice	.853	.036	.712	.445
Genuinely Compassionate	.687	.464	.750	.234
Concern for Others	.750	.422	.718	-.039
Personal Maturity	.776	.339	.657	.388
Demonstrate Self-knowledge	.594	.461	.522	.492
Respect Every Person	.756	.355	.771	.206
Balance in Behaviour	**.438**	**.656**	.597	.147
Learn from Criticism	**.278**	**.725**	**.116**	**.850**
Aware of their Gifts	**.172**	**.676**	**.130**	**.713**
Learn from Praise	**.183**	**.832**	**.197**	**.727**

*Component 1 = Human Maturity. Component 2 = Self Awareness
[a]Cronbach's Alpha = .914 on 9 items, [b]Cronbach's Alpha = .715 on 3 items
[c]Cronbach's Alpha = .879 on 9 items, [d]Cronbach's Alpha = .713 on 3 items

Table 4.12 Factor Analysis Spiritual Dimension Traits

Spiritual Item	Factors for Indicated Component*			
	Desirable		Perceived	
	1[a]	2[b]	1[c]	2[d]
Understand Baptismal Call	.243	.854	.330	.737
Sense of Vocation	.337	.746	.491	.634
See Ministry of Governance	.145	.803	.277	.764
Committed to Mission of Church	**.603**	**.320**	.145	.820
Identification with Ecclesial Community	**.647**	**.019**	.137	.692
Practices of Prayer and Spirituality	**.745**	**.364**	**.665**	**.431**
Open to Transcendent	**.719**	**.321**	**.743**	**.307**
United to Word of God	**.799**	**.231**	**.822**	**.250**
Growth in Love	**.799**	**.287**	**.878**	**.076**
Bridge for People to Christ	**.474**	**.389**	**.669**	**.242**

*Component 1 = Sense of Call. Component 2 = Call to Spirituality
[a]Cronbach's Alpha = .713 on 5 items, [b]Cronbach's Alpha = .850 on 5 items
[c]Cronbach's Alpha = .834 on 5 items, [d]Cronbach's Alpha = .857 on 5 items

Table 4.13 Factor Analysis Intellectual Dimension Traits

Intellectual Item	Factors for Indicated Component*			
	Desirable		Perceived	
	1[a]		1[b]	
Faith Rooted in God's Revelation	.542		.666	
Faith Embodied in Living Tradition	.480		.738	
Journey to Theological Reflection	.689		.757	
Some Background in Missiology	.669		.677	
Some Background in Ecclesiology	.768		.775	
Some Background in Canon Law	.777		.695	
Articulate Missiology for Ministry	.648		.715	
Understand needs in Light of Scripture and Tradition	.755		.751	
Knowledge of Catholic Social Teaching	.589		.746	
Catechism of Catholic Church	.376		.691	
Appreciation of Faith through Intellectual Formation	.703		.713	

*Only one factor: Component 1 = Catholic Intellectual Tradition.
[a]Cronbach's Alpha = .858 on 11 items, [b]Cronbach's Alpha = .905 on 11 items

Table 4.14 Factor Analysis Pastoral Dimension Traits

Pastoral Item	Factors for Indicated Component*			
	Desirable		Perceived	
	1[a]	2[b]	1[c]	2[d]
Understand the Ministry	.917	.049	.619	.370
Understand Responsibility for Catholic Identity	.909	.195	.696	.324
Discern Signs of Times for Mission	.727	.514	.765	.136
Understand Responsibilities of Bishop for Coordination	.378	.426	.680	.071
Responsibility for Spiritual Life of Ministry	.576	.504	.801	.056
Inspire Common Purpose	.572	.435	.488	.526
Selecting Future Governors	**.247**	**.822**	**.679**	**.265**
Forming Future Governors	**.402**	**.791**	**.654**	**.273**
Understand Organisational Systems and Dynamics	**.044**	**.819**	**.171**	**.865**
Call Leaders to Account Appropriately	**.654**	**.558**	**.113**	**.815**

*Component 1 = Catholic Identity and Mission. Component 2 = Formation for Canonical Governance
[a]Cronbach's Alpha = .890 on 7 items, [b]Cronbach's Alpha = .821 on 3 items
[c]Cronbach's Alpha = .821 on 8 items, [d]Cronbach's Alpha = .747 on 2 items

4.6   Chapter Summary

This chapter has reported on analyses of quantitative data in the research flowing from the survey instrument. Chapters 5 and 6 will report on the analyses and the reflections of interviewees on the survey data.

Section 4.3 reported on the demographics of the respondents. These indicated that the respondents to the survey provided a population which was well informed and experienced in the area of the study.

Section 4.4 reported on the survey responses in the light of the framework for formation being proposed by the study under the headings of Human, Spiritual, Intellectual and Pastoral Dimensions. The responses to the items revealed that the traits listed as desirable in canonical governors were believed to be relevant by the respondents and that, in general, that the respondents could not report on the traits being in evidence at the current time.

Section 4.5 reported the statistical analysis, which used t-tests to identify statistically significant differences and used factor analysis to provide evidence of relevant emphases in each of the four dimensions. The t-tests indicated that 38 of the 43 items had statistically significant differences between the desirability of the traits and the perception of these traits in current practice.

These results supported the research questions with regard to the need to prepare people with formation for the role of canonical governor and the establishment of a proposed framework for the formation.

These survey results were used for the interviews and obtaining the reflections of interviewees. The factor analysis results were used in analysing and reporting the data. Chapter 5 reports on the analysis of the data on the Human and Spiritual Dimensions. Chapter 6 reports on the analysis of the data on the Intellectual and Pastoral Dimensions.

Chapter 5 – Asking the Experts:
Interpreting Survey Responses – Human and Divine

5.1   Introduction

The purpose of this chapter is to report the analysis of the survey data applying to the Human and Spiritual Dimensions in the light of reflection on the data by people with expertise in fields pertinent to canonical governance.

The survey had been designed to identify current desirable traits. The survey data showed a discrepancy between the traits in the Human and Spiritual Dimensions believed to be desirable and the degree to which they were in evidence in people involved in the role of canonical governance. The data also supported a proposed framework based on the Human and Spiritual Dimensions associated with formation.

These themes from the survey data provided the basis for the questions to be asked in interviews. The interviews provided the opportunity to explore these themes and related issues in depth. See Appendix 2 for the survey results on individual items.

5.2   Sourcing Interviewees

Survey respondents were invited to nominate if they would be available for an interview at a later time. Three respondents indicated in the affirmative and two of these were able to be interviewed. The timing was not suitable for the third.

The researcher then emailed a further 15 targeted people. Some had completed the online survey. Some were known to the researcher. Others were recognised leaders in the relevant fields. The researcher had become aware of them through their writings and their email address was available on the web. Most were employed at universities or in healthcare systems. These potential interviewees were targeted on the basis of their expertise as formators for, or involvement in, canonical governance, and their presumed ability to reflect on the results of the survey and what the implications might be for formation. All of the 15 people identified accepted the invitation to be interviewed, making 17 interviewees in all.

These 17 people were interviewed either in person or by phone in Australia and United States of America. Of the 17 interviewees, there were 8 men and 9 women. 8 of the women and 2 of the men were from the USA. 6 of the men and 1 woman were from Australia. 5 interviews were conducted by telephone and 12 by face to face means.

Each interview was between 40 and 60 minutes in duration.

Interviewees had varied backgrounds and exercised multiple roles. They included lay people, Bishop, priests, men and women of Religious Institutes, theologians, lawyer, canonist, accountants, members of Public Juridic Persons, Religious Institute leaders, leaders of Public Juridic Persons, professors, formators and members of leadership teams of Religious Institutes. They had backgrounds in health and higher education ministries in the Catholic Church.

The interviewees were labelled by their roles rather than their names to maintain their anonymity. Labelling by role provided an indication of the background of the interviewee.

The attributes of gender and country were excluded in order to maintain the interviewees' anonymity. The following lists the interviewees, identified, for example, as "Interviewee A", i.e., by an upper case letter of the alphabet, together with their key attributes:

A   Lay person, member of a Public Juridic Person

C   Lay person, member of Trustees of a Public Juridic Person

D   Member of a Religious Institute leadership, formator

E   Lay person, member of a Public Juridic Person (PJP)

F   Priest involved in oversight and advising on Public Juridic Persons

G   Bishop, canonist

H   Congregation leader of Religious Institute; member of a PJP health ministry

I   Lay person, member of a PJP

J   Member of a Religious Institute leadership; member of a PJP health ministry

L   Lay person, theologian

N   Congregation Leader of Religious Institute; member of a PJP health ministry

P   Member of Religious Institute; theologian; formator in PJP formation

R   Member of Religious Institute, theologian, formator in PJP formation

T   Lay person, theologian, formator in PJP formation program

V   Member of Religious Institute; theologian; formator in PJP formation

X   Priest, theologian, formator in PJP formation

Z   Member of Religious institute, social worker, formator in PJP formation

Interviewees were provided with the proposed identifiers to ensure they were satisfied with their confidentiality, and all interviewees approved of the identifiers. An adjustment was made in response to one request.

5.3 Interviewee Responses on the Meaning of Formation

Interviewees were invited to comment on the "reasonableness" of the definition of formation which had been provided to them, namely that formation was a "holistic preparation of a person for a role – human, spiritual, intellectual, pastoral – including reflection on the experiences of their own life".

Interviewees were supportive of what was proposed, while some offered further insights. The interviewees' reflections also indicated that they came to the acceptance and agreement with the definition from different experiences. A sample quote:

> "I think you are picking up the essential concepts that are important in formation. You must have human formation, spiritual formation, intellectual formation and pastoral formation, particularly for the role that we are talking about here in this context." (Interviewee D)

Another interviewee reflected on the definition in the light of the work in their own ministry:

> "It is similar to the definition in many ways that we have developed for use in our formation program and I think the particular points of similarity are the discussion of one's gift." (Interviewee X)

Others saw the definition as relevant:

> "I can see it as developing people for a role, a specific role and it includes all those aspects, human, spiritual, intellectual and pastoral. So I think that is valid." (Interviewee C)

And another:

> "It covers all the things that I would expect." (Interviewee E)

One interviewee, while agreeing with the content, was concerned about the current practice:

> "While everyone agrees that you need certain traits whatever they are, however they are defined, I think the understanding is that we are a long way from people having yet acquired them." (Interviewee F)

Several interviewees indicated particular elements in the definition which they appreciated and which provided a rationale for their decision.

Several commented on the term "reflective development on one's gifts":

"I think certainly you start with a reflective development on one's gifts and then how those gifts relate to the particular activity that is going to be proposed. What it is that you are governing." (Interviewee F)

Another also reflected on the idea that the gifts were being developed for a particular purpose and also the differing roles in the leadership of the ministry:

"That brings in your point that it is a reflected development. How you contribute to the need. The need in this case is canonical governance. In another case it might be how to be a board member or a director of mission" (Interviewee N)

Another interviewee addressed the need to understand the place of reflection and gifts in the definition:

"Reflection and personal gifts – how those contribute to the role of canonical governance, and using that as a basis for holistic preparation – I thought that was really important." (Interviewee P)

Several interviewees commented on the importance of recognising the lived experience of people as the starting point for further formation and recognition of that concept in the definition:

"We definitely try to connect formation experience with their own personal experience, so I think there are many similarities here and I think this is a very adequate definition." (Interviewee X)

Another interviewee spoke similarly:

"Well you have a reflected development on one's gifts, it is also about beginning with the gifts that you have and developing them." (Interviewee F)

However, the interviewee was concerned that the wording might leave a person believing that reflection on the gifts was all that was required:

"There is a little too much on the reflection. You have to begin with an assessment of one's gifts and then an assessment of what one needs to do to build on those gifts in order to meet the outcome which is fitness for canonical governance." (Interviewee F)

The definition developed for the research to define what was meant by formation, was supported by the interviewees:

5.3.1   Areas Not Covered by the Definition of Formation

An issue which was mentioned by some interviewees concerned the need for "technical competence" for the need in hand to be able to make appropriate decisions for the ministry and its operation. They indicated that this aspect did not seem to be covered by the definition. Sample quotes included:

> "A governance role requires certain technical skills that would relate to management of people and certain technical skills relating to the particular enterprise that is being governed. If you are governing schools you need to have some technical knowledge of schools, if you are governing hospitals I think you would need some technical knowledge of hospitals." (Interviewee F)

Another interviewee commented similarly:

> "Depending on the institution they are governing, they will need specific knowledge. I was not sure that I saw it there. For instance you will want not just a good person with human gifts, with spiritual gifts, intellectual gifts and pastoral gifts who does not know tiddly-winks about higher education or about healthcare to be in canonical governance. There is a body of professional information that they have to have to be credible." (Interviewee V)

In referring to "technical competence" in health care or education, they were not seeking to make it a substitute for the elements of the definition, but saw it as a necessary competence for the role of governance. The researcher accepted the point as an issue, but believed that it was be dealt with as an aspect of the Intellectual Dimension in the proposed framework.

There were several comments about the definition indicating that formation was for a purpose, in this case, an aspect of a ministry. A sample quote:

> "Certainly I can see it as developing people for a role, a specific role and it includes all those aspects." (Interviewee C)

Another interviewee was more specific:

> "There has to be in a sense a personal orientation towards service in ministry, and understanding how the work we do in governance or in any element of health care, for example, or education is an extension of God's work and our part in that." (Interviewee T)

The interviewee also made the point that the formation applied to the needs of the ministry:

"Formation [is] not just for the individual, but also for the sake of the organisation that the person serves." (Interviewee T)

In the light of all the discussion and responses of the interviewees, the definition was taken as reasonable for the research.

5.4 Interviewee Responses on the Dimensions of the Framework

The interviewees' responses to the survey results were often long and reflective. In many cases, they appeared to be "thinking out loud", with the last sentence of their response the result of their progressive reflection. This process of reflection provided valuable insights into the line of the interviewees' reasoning and a useful source of related data.

The interviewees' responses to the results of the survey data were analysed in the terms of the seven factors chosen from the factor analysis which was reported in Chapter 4. These factors related to the four dimensions in the proposed framework.

5.5 Human Dimension

The Human Dimension was taken from the first of the four dimensions for formation the Church documents *Pastores Dabo Vobis* (Pope John Paul II, 1992) and *Co-workers in the Vineyard of the Lord* (United States Conference of Catholic Bishops, 2005). The *Co-workers* document described the goal of formation (p. 36):

"Human formation seeks to develop the lay ecclesial minister's human qualities and character, fostering a healthy and well-balanced personality, for the sake of both personal growth and ministerial service."

From the factor analysis of the responses to the survey items on the Human Dimension Table 4.14), "Human Maturity" and "Self-Awareness" were chosen as topics to base the responses of the interviewees.

5.5.1 Human Maturity

The factor analysis of the Human Dimension suggested that "human maturity" was a significant factor in the formation needs of people to undertake canonical governance.

For the purposes of the research, human maturity was examined in the light of the interviewee responses to the items concerning canonical governors being people of integrity. Such integrity is evidenced by a deep sense of justice, genuine compassion and respect for every person. Interviewees had been invited to consider the survey results for these items.

5.5.1.1 Sense of Justice

The desirability of the trait of canonical governors having a deep sense of justice was rated very strongly by survey respondents (Table 5.1). However, their perception that the understanding was in evidence was rated as Very High on the Likert-type scale by 19.5% of respondents and as High by 45.6%, giving a combined figure of 65%, well below the figure for the equivalent items rating the desirability of this trait.

Table 5.1   Responses (%) relating to Canonical Governors Possessing a Deep Sense of Justice (*N* = 92)

Canonical Governors Possess a Deep Sense of Justice			
Extent of agreement on desirability		Perceived degree of awareness	
	%		*%*
Strongly agree	**68.48**	Very high	**19.57**
Agree	**29.35**	High	**45.65**
Disagree	0.00	Fair	25.00
Strongly disagree	0.00	Low	2.17
No answer	2.17	Unable to judge	3.26
		No answer	4.35

Interviewees had a range of reactions to the survey results regarding the question "Deep Sense of Justice". Some were encouraged by the finding that the majority (65%) of survey respondents thought that canonical governors had a high to very high sense of justice.

One interviewee explained:

> "What I am happy to see is … that canonical governors [do] possess a very deep sense of justice." (Interviewee D)

Another interviewee supported the need for the trait:

> "What we are about in Catholic healthcare is being able to provide just and equitable services to those most in need so I think having a deep a sense of justice would be certainly a desired trait for someone who served at that level." (Interviewee Z)

Other interviewees explained that they would have expected more similarity in survey responses between the desired and perceived traits of canonical governors. Comments included the following:

> "I would have thought that there would have been a greater correlation between desired and perceived in respect to human formation because human formation cuts across any number of different areas of governance, but there is quite a spread with respect to the perceived/actual." (Interviewee F)

Another interviewee expressed similar surprise at the discrepancy:

"Well the desired traits didn't surprise me in terms of the higher percentages, but the perceived response I have to admit did surprise me a little bit that they were so low. If gave me pause to think, wow! 50% of them or more go from fair to low." (Interviewee N)

However, one interviewee was positive about the lower figure in the perceived score:

"I am not dismayed either because it [perceived] still has a fairly high standing there; justice is 65% … that is probably not bad in reality; not as high and you might like [the support]." (Interviewee A)

Despite the range of reactions, interviewees supported the position that a deep sense of justice was an important trait, and thus "desired". They also considered that formation was needed to bridge the gap between what was desired and what was perceived to be the reality of this trait.

Several of the interviewees in the US pondered the meaning and importance of canonical governors having a sense of justice, and what it meant to have a sense of justice. At the time of the interviews, the US President was working to have a bill passed which would provide health care cover for some 30 million citizens who currently had no cover. The justice issue being debated was whether health care should be a social right or a paid for service (Keehan, 2009a, 2009b).

This situation underlined the point that the interpretation and practice of justice was contingent on the culture of a given society, "culture" interpreted in the broadest sense. There was not one definition of justice which was understood by all for every situation. The following comments illustrated this point:

"The first issue is do we agree about the definition of justice?" (Interviewee H)

"I do not know how fully they understand at least the understanding of justice." (Interviewee X)

Some interviewees gave examples and reflections highlighting what they saw as a developing sense of justice over recent times:

"Well I wonder whether if you had done this forty years ago that deep sense of justice would have been recognised as being important. That was interesting to me that that was so … I almost wondered whether, for the responders, the greater awareness that we

have of the centrality of justice causes them [now] to look for that in others." (Interviewee L)

Another interviewee also reflected on the change in understanding of justice over time:

"The legislation [for healthcare reform, USA] does reflect at least some change in the national consciousness that health care is a right. … we are still dealing with people who think it is a consumer good and if you have money you can pay for it." (Interviewee H)

Others were more measured in their views, for example:

"I think the whole concept of societal justice is not as strong in the Catholic mind as many of these other issues that you have brought up." (Interviewee J)

A further group of interviewees was critical of the understanding and practice of justice of some canonical governors, for example:

"We have a number of board members in our hospitals who I think are very good people, very dedicated to the ministry but they were very opposed to healthcare reform in this country. Their views are based on a certain sense of the economy and so forth, but would I say that they are unjust people." (Interviewee X)

This interviewee further explained that:

"There might be kind of a naïveté where they would say "I am a just person" [without] fully understanding what the tradition is if that is the understanding that we are basing this on." (Interviewee X)

Interviewees' reflections about justice were centred on the needs of particular ministries as they grappled with the tension of serving the mission with finite resources. This meant that decisions and choices had to be made. These decisions saw lower priority given to some needs which were eligible for attention and resourcing in the light of the mission. Interviewees felt that this could lead to the perception that the canonical governors of the ministry were unjust.

There was particular passion in the interviewees who were or had been members of Public Juridic Persons. They spoke out of their lived experience in decision making about the difficulties of providing as much quality service as possible in the light of the mission and the resources. The issue was that those not involved in the difficulty of the decision making, may perceive that the decision led to injustice. For example:

"I could see where there would be some difficulty in always being able to interpret [some] element of justice." (Interviewee Z)

"When some of those issues are brought to bear [which would indicate] whether or not they [governors] have a deep sense of justice, whoever is not around that table will not really know that individual is caring." (Interviewee Z)

Another interviewee reflected:

"So it depends on perspective. But I would sort of defend the position that was taken and the way we went about coming to a decision, that these things were very high in our minds. But there could be a perception that certain people perhaps, in making that decision, were not treated justly." (Interviewee I)

The responses indicted that there is a cultural understanding in the expectation of the meaning of justice and that the perceptions of the justice of decisions may not have any understanding of the deliberations of the decision makers in coming to their conclusions. Conclusions which they believe they can justify.

5.5.1.2   Formation and Sense of Justice

The reflections of the interviewees highlighted the importance of formation in the area of justice and the need for canonical governors to be conversant with Catholic Social Teaching in the Catholic Social Tradition, and how it may be applied in different socio-political contexts.

The range of responses to the survey results indicated that people are at different levels of understanding of justice and the differences in understanding of the meaning of justice indicate that there was not a clear, shared meaning among people when the word justice is used.

A further aspect for formation regarding justice was the appreciation of the need to set priorities in the light of limited resources and the call of the mission. Canonical governors need to understand the basis of their decision making.

5.5.1.3   Compassion

The desirability of the trait of canonical governors being compassionate was rated very strongly by survey respondents (Table 5.2). However, their perception that the understanding was in evidence was rated as Very High on the Likert-type scale by 19.5% of respondents and

as High by 46.7%, giving a combined figure of 65%, well below the equivalent items rating the desirability of this trait.

Table 5.2   Responses (%) relating to Canonical Governors being Genuinely Compassionate (*N* = 92)

Canonical Governors are genuinely compassionate			
Extent of agreement on desirability		Perceived degree of awareness	
	%		*%*
Strongly agree	**57.61**	Very high	**19.57**
Agree	**38.04**	High	**46.74**
Disagree	3.26	Fair	19.57
Strongly disagree	0.00	Low	2.17
No answer	1.09	Unable to judge	6.52
		No answer	5.43

The interviewees grappled with expressing what was meant by compassion and what should not be regarded as compassion, as shown in the following quotations:

"Compassion is not 'bleeding heart' stuff." (Interviewee R)

"With some [canonical governors] there is not a whole lot of room for what I would call sympathy, as opposed to compassion." (Interviewee D)

The reflections and responses of interviewees who were members of Public Juridic Persons indicate some of the difficulties associated with understanding the trait of genuine compassion, for example:

"I think we struggle to really understand things like compassion. It is not unmitigated kindness at all costs and it can often appear in that guise, which is counterproductive." (Interviewee A)

One spoke of how reflection on compassion had been part of the canonical governors' decision making:

"I know we are dealing with perceptions and maybe I could be defensive, or appear to be defensive, but I can understand people's perceptions. You are in it, you make your decisions, you cannot explain the decision and the way you came about that decision. The decision was made and there may be some people who may consider themselves treated unjustly or without compassion." (Interviewee I)

These responses indicated that there was a desire that people know the meaning of compassion and were able to recognise it and explain how it worked in practice (Catholic Health World, 2011b). Compassion as a virtue and a value does not stand alone. It is always

in tension with the capacity to provide resources to meet the needs which have been identified and prioritised in the light of the mission to bring the good news of the Kingdom (White, 1996).

Interviewee responses also highlighted the difficulty of measuring or evaluating a level of compassion. For example, the following comments related to evidence and perceived changes in compassion:

> "How is it in the work of a sponsor group that somebody would perceive that this is evidence of a compassionate person or a compassionate response to something?" (Interviewee T)

One interviewee pondered on the possible impact of the leadership process on people:

> "It seems to me that people who are drawn to that field [healthcare] would be strong in compassion when they come in at the beginning levels, and does it get bred out of them as they rise to a position of leadership, or is it just the perception? Perceptions are important." (Interviewee L)

The responses of the interviewees indicated that there was a broad range of interpretation of the meaning of compassion as a term which need to be addressed in forming people for canonical governance.

5.5.1.4 Formation and Compassion

Canonical governors need to be able to articulate clearly what compassion means and be able to express how it is enacted in the ministry. Further, they need to be aware of the factors which make the face of compassion in the ministry difficult to see – difficulties being faced by staff resulting from the range of factors which put pressure on them in the delivery of services in the ministry.

5.5.1.5 Respect for Every Person

The desirability of the trait of canonical governors having respect for every person was rated very strongly by survey respondents (Table 5.3). However, their perception that the understanding was in evidence was rated as Very High on the Likert-type scale by 14.13% of respondents and as High by 44.57%, giving a combined figure of 58%, just over half the figure for the equivalent items rating the desirability of this trait.

Table 5.3 Responses (%) relating to Canonical Governors' Respect for Every Person
    (*N* = 92)

Canonical Governors respect every person			
Extent of agreement on desirability		Perceived degree of awareness	
	%		*%*
Strongly agree	**63.04**	Very high	**14.13**
Agree	**30.43**	High	**44.57**
Disagree	4.35	Fair	28.26
Strongly disagree	0.00	Low	4.35
No answer	2.17	Unable to judge	2.17
No answer			6.52

The interviewees compared the survey responses across the items of justice, compassion and respect. Interviewees commented on the fact that the area of "Respect for every person" was not rated as highly (93.47%) as either justice (97%) in Table 5.1 or compassion (95%) in Table 5.2 in the overall level of importance by survey respondents. They were also struck by the significantly lower survey ratings given in the Perceived responses (58.7%), for example:

> "When I look at compassion being higher than respect I think people always grab a take toward compassion because they think that is the loving and caring and good neighbour type thing." (Interviewee Z)

Another interviewee was concerned at the place of respect in the relationship among the three qualities:

> "It was interesting to me that the question about wanting someone who respects every person was ranked the lowest of these three questions both in desire and in perception." (Interviewee P)

The interviewee offered a rationale for the concern

> "Somehow respect for persons seems to be the basis for justice and compassion and so it should be highest rather than lowest." (Interviewee P)

The view was supported by another interviewee:

> "I would have expected that higher because the compassion, the respect, the dignity of the person, is the core from which everything else flows. If it is not very high then that is surprising." (Interviewee J)

One interviewee expressed surprise at the low score in perceived:

"I was surprised … I mean, thirty per cent fair to low [perceived] respecting every person. Those are very basic and I do not know how you would probe why that is said, but it surprised me." (Interviewee L)

Many of the interviewees saw respect for others as the most fundamental aspect. For example, one commented that,

"[At] the meeting or something, you take respect for granted. That is something the participants owe one another." (Interviewee V)

Another interviewee stated that,

"When you start looking at Catholic social teaching and the dignity of each person – that is what we are grounded upon." (Interviewee Z)

The interviewees' responses strongly supported the value of respecting persons in the responsibility of canonical governance.

5.5.1.6 Formation and Respect for Persons

The interviewee responses suggested that "respect for persons" needed to be an element in formation for canonical governors. However, as with the items of justice and compassion, there was little articulation of what interviewees meant by respect. As such, this element would be explained and seen to flow from a belief in the dignity of the human person, and therefore would be fundamental to ministry. The focus of this element would be further supported by its articulation with Catholic Social Teaching (Aubert & Boileau, 2003, pp. 245-248).

The aim of formation in this context would be that canonical governors have, and demonstrate, respect for persons and understand the rationale underpinning this principle of Catholic Social Teaching and be able to articulate it to be involved in and served by the ministry.

5.5.1.7 Further Insights on Human Maturity

Further insights from interviewees extended beyond the consideration of individual items relating to sense of justice, compassion and respect to seeing them in relation to one another, along with other characteristics. The term most commonly used by interviewees as describing the desired traits in human maturity was "well-rounded", as in the canonical governors being

required to be "well-rounded". In other words, interviewees did not see the trait of human maturity in "stand-alone" terms, for example:

"In some people's perception that is a lack of compassion whereas it is really a sense of justice and it is important that you have justice and compassion juxtaposed in respect, like the three of them run one into another." (Interviewee D)

One interviewee spoke of the articulation of the three aspects:

"Yes, but those canonical governors – and me being one of them – in our discernment process, have considered justice, compassion and respect for the benefit of the mission and the organisation." (Interviewee I)

Their view was that justice, compassion and respect are important requirements and that people would not be considered for roles in canonical governance if these traits were absent. For example, one interviewee explained that:

"They are human qualities, but they [justice, compassion, respect] are very much Gospel [values] found in human qualities." (Interviewee D)

Another interviewee stated that:

"We do not name justice, compassion and respect but we would never choose someone who did not have those because they are special through the other requirements of the church." (Interviewee E)

Another example of the relationship between these traits was the tension between compassion and justice. This tension arose because decisions needed to be made about the allocation of finite resources that cannot meet all the needs presented or observed. Thus, it may seem that there is a lack of compassion, for example, when the organisation makes decisions about long-term survival, whereas it could be argued that such a decision was just because it was based on the needs of the longer term survival of the ministry.

The interplay of these traits, issues and contexts is complex. Canonical governors require the human maturity to deal with such complexity. In short, they need to be people who are well-rounded.

The following statements by interviewees indicate the tension and need for clarity in decision making about complex issues:

"I believe that there is justice, compassion and respect but there have been occasions where certain decisions have had to be made for the good of the mission if you like, and

I can understand a perception that perhaps there has not been justice exercised; a perception from an outsider." (Interviewee I)

One interviewee indicated how the traits were so embedded in the people in the canonical governance role that they may not be articulated:

"You actually have to understand and know the values and mission of the organisation and [how] those values are embedded in the mission of the organisation … They do not get an interview unless they meet these criteria." (Interviewee E)

These responses of interviewees indicated the complexity of issues facing canonical governors in their leadership and supported the research proposition that canonical governors need to be people with human maturity to enable them to act with integrity when dealing with complex issues.

5.5.1.8   Reflections on Human Maturity and Formation

The responses of the interviewees indicated that formation is significant in traits related to human maturity and need to be considered for those in the roles of canonical governance.

Interviewees highlighted the need to learn and make decisions appropriate to the values of the ministry in the mission of the Church. Their grappling with those values, particularly those associated with justice, compassion and respect, and how these are expressed, indicated the need in governance formation to develop and articulate such values and articulate how they are enacted in the ministry.

This was best summed up in the observation of one interviewee, which expresses both need and confidence:

"Maybe it means that we acknowledge we still have a way to go, that we are being realistic about it." (Interviewee A)

The responses of the interviewees aligned with Župarić's (2010) claim that maturity is a dynamic concept. Canonical governors need to be able to develop in their human maturity.

The interviewees had different views of the implications of the results of the survey. These differences were due to whether they saw the lower results for Perceived compared with Desired as something to be expected. However, interviewees overwhelmingly supported the proposition that certain Desired traits were essential and that formation was needed to bridge the gap between the traits the survey respondents had judged to be desirable and their judgment as to the degree to which these were found in actual practice

5.5.2 Self-Awareness

Factor analysis found that "self-awareness" grouped with several items, including awareness of one's own gifts.

The implications that emerged were that being involved in canonical governance might lead to a deeper self-awareness which was not the expected outcome for the person at the beginning. But there was recognition of the need for initial self-awareness to engage in the responsibility.

5.5.2.1   Awareness of Gifts

The desirability of the trait of canonical governors being aware of their gifts was rated strongly by survey respondents (Table 5.4). Their perception that the understanding was in evidence was rated as Very High on the Likert-type scale by 13% of respondents and as High by 69.57%, giving a combined figure of 72%.

Table 5.4   Responses (%) relating to Canonical Governors' Awareness of their Gifts ($N = 92$)

Canonical Governors are aware of their gifts			
Extent of agreement on desirability		Perceived degree of awareness	
	%		*%*
Strongly Agree	**29.35**	Very High	**13.04**
Agree	**61.96**	High	**69.57**
Disagree	6.52	Fair	10.87
Strongly Disagree	0.00	Low	2.17
No answer	2.17	Unable to Judge	4.35
		No answer	0.00

Several interviewees spoke of the importance placed on starting formation from the experience of the person. Some of those who were themselves involved in formation expressed the following views:

> "We clearly try to use that information to raise a person's awareness of their own gifts that they bring to this ministry and how they contribute to that need. We definitely try to connect formation experience with their personal experience." (Interviewee X)

One indicated the connection between self-knowledge and what else may need to be elicited in a person:

> "Yes, there is only one way to find out what else you need, by bringing together all your own gifts and reflecting on them and how in fact you can apply them to the work to be done and then you soon find out that you may have some strong gifts in one area and yet are sadly lacking in another." (Interviewee J)

One interviewee reflected on the personal formation experience that had been engaged in as preparation for the role of canonical governor:

"The personal reflection made me consider elements and made a difference in my spiritual life, primarily I must say. Questioning knowledge that I have – what I would like to have, so there are questions. It has been a very personal thing." (Interviewee I)

Several interviewees spoke of the development of self-awareness leading to an understanding of a personal spiritual role. A sample quote:

"It says that, to me perhaps, there needs to be more work done helping people to understand that [in] this role of canonical governance … we need to have more of an understanding [of the] connection between baptism and mission. So that just reaffirms for me that there is more that should be done there." (Interviewee Z)

One interviewee reflected on their personal journey to deeper self-awareness:

"I gradually grew into doing what I now do. It was not by accident. It was by choice." (Interviewee A)

In responding to the item of self-awareness, interviewees demonstrated a deep level of self-reflection as they grappled with what they sought as adequate answers. This, in itself, affirmed the responses regarding the appropriateness of the definition which referred to self-reflection as a necessary element of formation for canonical governance.

5.5.2.1   Formation and Self-awareness

Formators spoke of the role of self-awareness and awareness of gifts in current formation programs. These included the principle of adult learning and of starting from where a person was in their development.

The implication for formation was that such awareness is fundamental. Further, there emerged a need for holistic development, to link evaluation of one's actions through praise or criticism to the range of skills to enhance the awareness and self-knowledge.

5.6   Spiritual Dimension

The factor analysis of the Spiritual Dimension (Table 4.15) identified that the survey responses grouped into two elements of "The Sense of Call and Vocation" and "Call to Spirituality".

5.6.1 The Sense of Call and Vocation to the Role of Canonical Governor

The factor analysis of the items in the Spiritual dimension indicated that a sense of a calling to the role was important for canonical governors.

For the purposes of this research, the engagement in the ministry is an engagement in canonical governance. A further issue is whether the engagement comes not just from the baptismal call, but a particular vocation for the role. The difference between the two is best expressed as a matter of different levels of involvement (Hahnenberg, 2003, p. 204).

The interviewees provided their reflections on the issue of a baptismal call and the development of an understanding of vocation, particularly in relation to the need for formation. These concepts were examined in Chapter 2.

5.6.1.1 Understanding Baptismal Call

The desirability of the trait of understanding the baptismal call as a call to mission was rated very strongly by survey respondents (Table 5.5). However, their perception that the understanding was in evidence was rated as Very High on the Likert-type scale by 17% of respondents and as High by 33.7%, giving a combined figure of 51%, just over half the figure for the equivalent items rating the desirability of this trait.

Table 5.5 Responses (%) relating to Canonical Governors' Understanding of their Baptismal Call to Mission (*N* = 92)

Canonical Governors' understanding of their Baptismal call to mission			
Extent of agreement on desirability		Perceived degree of awareness	
	%		*%*
Strongly Agree	**60.87**	Very High	**17.39**
Agree	**31.52**	High	**33.70**
Disagree	3.26	Fair	26.09
Strongly Disagree	0.00	Low	6.52
No answer	4.35	Unable to Judge	10.87
		No answer	5.43

Interviewees expressed a range of opinions about the possible interpretation and implications of the differences between the responses rating the proposition as either desired or perceived:

> "You only have seventeen per cent there strongly agreeing, right? … I have expected you should have one hundred per cent strongly agree. If a canonical governor does not understand [their] baptismal call to mission how can [they] be a canonical governor?" (Interviewee F)

One interviewee saw the results of the survey responses meeting expectations:

"I'm not surprised that the ideal is there and it is seen to be an admirable ideal that canonical governors do actually understand their baptismal call to mission." (Interviewee D)

This range of reflections suggested that there is a need to clarify what is expected in terms of the current formation practices for canonical governance with regard to an understanding of the baptismal call to mission.

Interviewees reflected on what people understood by baptismal call and whether the term was in the general vocabulary of many people. For example, one interviewee explained that:

"I'm not sure that the governors that I know would articulate that as a quality themselves, yet they probably live it without consciously putting it in those terms." (Interviewee H)

Another interviewee said that:

"To say that because I'm a baptised Catholic then I have a commitment to living and proclaiming the Gospel. Lots of card carrying Catholics do not talk in that sort of language." (Interviewee D)

Interviewees were of the opinion that canonical governors who may not have understood the term were committed to following Jesus Christ and involvement in the mission of bringing the Good News, for example:

"I think they live as authentic Christians who are following Jesus and the gospel to the best of their ability, but they don't define it in terms of a baptismal commitment to mission." (Interviewee D)

"They may feel called to service but they may not identify it as an expression of their baptismal call." (Interviewee H)

As a consequence, some interviewees were led to reflect on their current formation programs and potential areas for development. One stated that the key to formation was "emphasising that call to service and holiness through our baptism" (Interviewee H).

Another interviewee commented as follows:

"There needs to be more work done helping people to understand that [in] this role of canonical governance … any ministry connected to our baptismal call … we need to [do

more] in helping people understand that connection between baptism and mission. That just reaffirms for me that there is more that should be done there." (Interviewee Z)

Interviewees also reflected on why the understanding of the baptismal call was regarded as important but not being seen in action. A number were concerned by the continuous task of the Catholic Church to imbue its adherents in the language and formation of Vatican II, for example as in the following:

"I think that there are lots of people, lots of card carrying Catholics, who really do not understand what baptismal commitment is all about." (Interviewee D)

"A baptismal call to mission is a serious and challenging concept that requires serious action." (Interviewee D)

The interviewee indicated that the difficulty might lie in a lack of theological education:

"[Baptism] is not one of the sacraments that people have had a good theological grounding in." (Interviewee D)

This view was shared by another interviewee who added an historical element:

"Thinking about our folks understanding their baptismal call to mission, I would have answered that very much in the context of how that appreciation from the Second Vatican Council is still taking root in people." (Interviewee H)

In referring to the formation needs for canonical governors, an interviewee noted:

"I do think they need some formation in sacramental theology particularly around the sacrament of baptism." (Interviewee D)

The responses of the interviewees supported the importance of understanding the role of the baptismal call of Christians as expressed in the documents of Vatican II and how canonical governors need to understand the significance for their own spiritual development and the spiritual life of the ministry for which they are responsible.

5.6.1.2   Non-Catholic Canonical Governors and Baptismal Call

Some interviewees spoke of their experience and concern at a movement where Public Juridic Persons had been approved allowing for the appointment of people as canonical governors who were not members of the Catholic Church. They spoke of some confusion being created

by this move, given that the ministries existed as a response to the baptismal call. They saw the understanding of the baptismal call as central, for example:

> "We have now a number of PJPs who do not require their members to be Catholic. I think if that is the case I think when we talk about a baptismal call to mission, I am not sure to what extent that makes up part of their understanding of their own faith tradition." (Interviewee J)

Another stated:

> "I do not think you can legitimately accept a governance position unless you have an openly expressed faith. I think it is such a contradiction." (Interviewee A)

Another interviewee explored the concept of canonical governance beyond the baptismal call:

> "I think it would be hard for a non-Christian. The reality is that if the organisations are correctly structured the people that are going to make appointments to canonical governors will be looking for people with particular characteristics and they are characteristics that would relate to someone who can participate in that aspect of the church and its ministry in the full sense of the word." (Interviewee C)

One interviewee expressed concern at actions taken by the Church in terms of appointment of non-Catholics:

> "I have been amazed that the Vatican has approved some PJP's here and apparently allowed them to have non Catholics as members on them. That is totally astonishing to me and it leads me to think that they just do not understand what is happening here." (Interviewee X)

The interviewee reflected a personal capacity to straddle religious traditions:

> "I cannot exercise that kind of responsibility for a tradition I do not belong to." (Interviewee X)

The issue is whether the baptismal call to serve the mission as a canonical governor can be exercised by a baptised believer who does not belong to the tradition or by a non-baptised person. This focused on the significance of the role of canonical governor compared with roles undertaken by non-Catholics at other levels in the Church, as one interviewee commented:

"The view is that every person participates at their own level within the church and it is possible for a person who has demonstrated an active promotion of the Catholicity and the spiritual ministry of the healthcare facility who is not catholic [to be involved]." (Interviewee C)

The needs for formation for canonical governance indicated that canonical governors require an understanding of the significance of the baptismal call to mission.

5.6.1.3   Sense of Vocation to the Role

The desirability of the trait of understanding the sense of vocation for the role was rated very strongly by survey respondents (Table 5.6). However, their perception that the understanding was in evidence was rated as Very High on the Likert-type scale by 19.57% of respondents and as High by 42.39%, giving a combined figure of 61.9% well below the equivalent items rating the desirability of this trait.

Table 5.6   Responses (%) relating to Canonical Governors having a Sense of Vocation to the Role (*N* = 14)

Canonical Governors have a sense of vocation to the role			
Extent of agreement on desirability		Perceived degree of awareness	
	%		*%*
Strongly Agree	**58.70**	Very High	**19.57**
Agree	**38.04**	High	**42.39**
Disagree	1.09	Fair	23.91
Strongly Disagree	0.00	Low	7.61
No answer	2.17	Unable to Judge	2.17
		No answer	4.35

One interviewee was concerned about the discrepancy between the ratings given to the desired and the perceived traits and referred to canonical governance as more than ordinary work, saying that it required the following:

"A sense of vocation to the role; that is what canonical governance is. It is not a job. It is not being on a board. It is the vocation of leading Church mission." (Interviewee F)

This response expressed a position that sees leadership of the ministries through responsibility for canonical governance as a significant involvement with the mission of the Church, and requires that canonical governors understand that it is a vocation to the ministry of governance. Other interviewees grappled with the meaning of the term "vocation":

"When you are talking about lay people having a sense of vocation to a role, I suppose the question that I would ask is 'define vocation'." (Interviewee A)

The interviewees reflected on their personal journey:

> "Speaking personally it is not something I ever felt was a vocation because I do not understand what that word means for me." (Interviewee A)

Another interviewee saw that the understanding of vocation was an important element in formation for canonical governance:

> "This is another area that I think is worth pursuing in the formation of governors because, I think the notion of vocation is very poorly understood." (Interviewee D)

Interviewees further commented that one of the issues in the area of vocation was that the word itself had come to be associated exclusively with ordained ministry or religious life. Sample quotes included:

> "We have, for so many years, narrowed the concept of vocation so that our lay colleagues might not tend to see this [canonical governance] as a vocation, certainly some kind of call." (Interviewee J)

> "I think there is a belief out there in the Catholic population that vocations are, or vocation is, about priesthood and religious life first." (Interviewee D)

> "I mean that sense of vocation has been equated to people who are either ordained or vowed and not to any one in any other walk of life whether it be married or single." (Interviewee Z)

On the other hand, interviewees also recognised that there is a growing awareness and understanding that vocation is a call to a particular ministry (Casey, 2010, p. 149; Hahnenberg, 2010, p. 72):

> "There is a growing awareness that every Christian has a vocation." (Interviewee D)

Interviewees commented on how this awareness of vocation might be expressed and developed:

> "I do not think that is the first thing that comes to mind when we talk to people who might be interested in serving in this way [as canonical governors], which goes to that next one which talks about vocation to the role. But I think it is growing in people." (Interviewee H)

Another interviewee spoke of the impact of introducing people to the relevance of the concept of vocation:

"When you tell them it is a whole vocation to the ministry of sponsorship, sometimes that amazes them. They say well I do not know if I could do that, because of their understanding of the word vocation." (Interviewee J)

One interviewee indicated that formation for vocation was necessary as a learned response:

"Vocation to the role … is a learned response that might not be there depending upon what formation people have been exposed to….People [need to] be helped to see the vocation that is there." (Interviewee L)

Other interviewees spoke of the growth of the awareness of vocation:

"There would be conversations something like that, but they would definitely not have language around vocation … and they may or may not develop it." (Interviewee E)

"I think sometimes they get involved in the experience then they think or realise that it is a call." (Interviewee R)

Some interviewees volunteered what a definition of vocation might be:

"Vocation means being united to the Word of God. I think it is just a question of getting lay people to see that this is a much more serious commitment and a deeper reality than maybe they were aware." (Interviewee X)

"Vocation is a choice we each make to live the Gospel in a loving and creative way. Vocation is about how do I best express the love in my heart in an integrated and authentic way, in a way that keeps me integrated and is authentic to me and is credible to people out there." (Interviewee D)

The interviewee saw that the role of canonical governor was a vocation for a responsibility in a ministry in the Church:

"Is being a canonical governor part of one's vocation? Yes, without a doubt. It is an invitation offered by a congregation … and it is response by people saying yes, this is how I can express my gifts in a way that are true to me and this is how I can express part of the love of my life." (Interviewee D)

In a similar vein, interviewees spoke of the personal experience of the development or awareness of vocation in their own life as canonical governors, for example:

"Did I hear a voice calling in the night? No. I gradually grew into doing what I now do. It was not by accident, it was by choice. But I did not have any moment when I thought I have to do this – if that is what a vocation means." (Interviewee A)

"Yes it does shape my life. I would explain my reasons for doing it as…I think this is enormously important work for the church and for whatever part I can play in that, if that does make even the slightest difference, that is a good enough reason for me to do it." (Interviewee A)

Another interviewee also spoke of personal experience:

"This is not an intellectual thing, being a canonical governor. There is kind of a lot of other stuff in there. So unless you feel that well, there is something here you kind of have been called to do. That is what vocation is." (Interviewee I)

One interviewee spoke of the journey to vocation of a member of their ministry:

"One member said on leaving after a number of years: 'In retrospect I was called to it, but at the time I did it because I thought it was an important thing to do'." (Interviewee E)

One interviewee gave a strong expression of understanding vocation as a whole of life development:

"Part of the vocation for me was married life, a certain business life and a church life. Part of it was because there were skills in my business life that were helpful and used in the church life. There became interdependency in that – okay you were doing it because it was tied in with so many other things aligned to church life." (Interviewee I)

Others downplayed the importance of "coming into the role". For example, one stated that:

"Certainly the intention is there but a vocation to the role? Whilst in an ideal world I might think that people should have [a clear sense of their vocation] and that is what we would see, a number of people coming in would not think they have that. They might have it later." (Interviewee E)

There was an affirmation among interviewees that the development of vocation was part of a life journey:

"Generally they will say at the end [of their appointment] 'this has been one of the most important journeys for the revisioning of my faith'." (Interviewee E)

For some interviewees it had been a very personal experience which they shared or had been shared by those with whom they were involved:

"So in my role I have a strong sense that for, call it providence or whatever else, opportunities have come my way to do certain things and use some of the skills that I have in one sense, but also my person to be involved in stuff at different times. The way this particular canonical governance opportunity arose as well, it is there, there is a certain amount of providence in it, so you kind of take it. For me personally it is high." (Interviewee I)

Another interviewee spoke of the journey of a confrere:

"One member said 'I accept this invitation and this offer with joy because this is a redemptive experience for me'. She is the only one that said that but I think the others may have felt it. But I have not asked them." (Interviewee E)

One interviewee touched on the point that an implication for engaging with the vocation was that it was not a short-term exercise in life:

"If this is a vocation then you are in this for the long haul, and individually." (Interviewee T)

However, an interviewee reported that the outcome of the involvement in ministry leadership is not always the development of a spiritual vocation:

"One of them in particular would have said at the end 'I am not a theologian. I never planned to be a theologian. I have contributed nothing theologically to this organisation at all. My profession is medicine and my contribution has been that.' And brilliant he was. We could not have done without him. So at the beginning and the end [there was] no sense of vocation, no sense of redemption, no sense of formation. But we held him." (Interviewee E)

Interviewees reflected deeply on the matter of vocation to the role. Their reflections support the understanding that there is a growing awareness in people involved in canonical governance that the process usually involves something other than a career.

5.6.1.4   Formation and Vocation

Some interviewees reflected on what they had seen occurring through formation programs and either the developing awareness of vocation, or the expectation that a formation program

would assist a person come to a realisation of what the implications were for their life, for example:

> "I think in some cases it [the developing of vocation] might be happening but I don't know that it is always across the board. I think that it is something that we need to continue to work towards and articulate. The recognition of the vocational part of this can come later." (Interviewee R)

The survey results and the interview responses indicated that a sense of vocation is believed to be important for canonical governors, and that formation for the role is essential. Further, because it is seen as a lifelong influence, continuing formation is required. This growth in understanding of vocation provided a link to the Human Dimensions of Human Maturity and Self Awareness which were seen as development to become a more rounded person.

5.6.2 Call to Spirituality

The second aspect suggested by the factor analysis of the spiritual dimension items was the place of spirituality itself.

A number of the items in the spiritual dimension had used the term "spiritual formation". In doing so, it was being attached to several concepts – "open to the transcendent", "living intimately with the Word of God", "daily growing in love of God", and "involves practices of prayer".

Several of the survey items relating to the spiritual dimension explored various elements as important to spiritual formation. The interviewees' reflections and responses to these items are now examined.

5.6.2.1 Open to the Transcendent

The desirability of the trait of understanding openness to the transcendent was rated very strongly by survey respondents (Table 5.7). However, their perception that the understanding was in evidence was rated as Very High on the Likert-type scale by 17% of respondents and as High by 33.7%, giving a combined figure of 51%, just over half the figure for the equivalent items rating the desirability of this trait.

Table 5.7   Responses (%) relating to Canonical Governors' Awareness of Spiritual Formation and Openness to the Transcendent (*N* = 92)

Canonical Governors are aware that spiritual formation requires individuals to be open to the transcendent			
Extent of agreement on desirability		Perceived degree of awareness	
	%		*%*
Strongly Agree	**60.87**	Very High	**17.39**
Agree	**31.52**	High	**33.70**
Disagree	3.26	Fair	26.09
Strongly Disagree	0.00	Low	6.52
No answer	4.35	Unable to Judge	10.87
		No answer	5.43

Over 70% of the survey respondents had been in seminaries for priestly formation or novitiates for religious formation, all of whom would have been nurtured in the concept of transcendence and interior searching. Two lay interviewees had not met the word "transcendence" or "transcendental" before.

Interviewees reflected on the meaning of transcendent, the connection between involvement with the transcendent, the development of the spiritual life, and the awareness that, while transcendent speaks of the world beyond, the engagement with it involves deepening reflection within a person. Sample quotes included:

"As Christians, a relationship with God, with the divine, with the transcendent, with Jesus is important to us all. Particularly as Christians, relationship with Jesus is important, or is an essential and that happens over a whole lifetime." (Interviewee D)

"Yes, I think [being open to the transcendental] is significant but it is a very personal experience and I think the way that people experience it is essentially different as people are different. But to be open to it, yes I do." (Interviewee A)

Another commented as follows:

"Certainly I think that this awareness for individuals to be open to the transcendent is very much uppermost in their minds and in my PJP [formation] work that is quite obvious. They [course participants] are eager to learn." (Interviewee J)

Language was a concern for some interviewees who had not come across the word "transcendental" in their experience. The interviewer provided the following verbal explanation for the interviewees who had this concern, based on McBrien (1994):

"The official language in a sense talks about the transcendence of God and the immanence of God; the God within and the God without; the Jesus of the Trinity and

the Jesus of the cross. So transcendent is the openness to see that there is more beyond us, or what reason might give you."

One interviewee's response was immediate agreement with the understanding and then reflection on why the offered explanation touched the interviewee's experience:

"Absolutely! Absolutely! ... Maybe because I have been given a chance to share in it; maybe if I was asked these questions three years ago, or four years ago, would the answers be different? Probably would not have been that much different, I think." (Interviewee I)

One interviewee introduced the term "interiority" as a term in use in some fields:

"The notions of interiority are so linked in my mind with faith based organisations but in fact the literature and research based around interiority does not come from faith based work which is interesting. So the notion of the transcendent sits comfortably with me around interiority, but it does not sit with lots of the literature. I think people become open to the transcendent in various ways." (Interviewee E)

The researcher found a description of interiority by Rivera (2011) in examining the writings of Michel Henry:

Henry does not associate Life, therefore, with a kind of metabolic or biological process but rather identifies it as a divine energy that manifests itself within the human sphere of interiority, *of auto-affective feelings irreducible to scientific study, objectification, or physical appearance within the world.* (italics added)

The expression of interiority and the definition above, aligned closely with that of the spirituality and being open to the transcendent. The interviewee quickly made a link between interiority and the aspect of spiritual that was being addressed, namely transcendent:

"I don't know that that is the language. I think interiority is the language that lay people would understand. .... the sort of history that [canonical governors] would have would be around a less churchy language and interiority is not a churchy language. Transcendent would mean something but it is not what they would use in their everyday lingo [language]." (Interviewee E)

One interviewee wondered as to whether the level of formation for Catholic people had been sufficiently adequate to assist their understanding of the concept of transcendent:

"I think that the average Catholic would still struggle with the idea of heaven being up in the sky, the old man with the beard and the young man and the dove. They do not get past that." (Interviewee G)

There was concern that the concept of transcendence was important, but the term is not used by people in the role of canonical governance:

"I do not know if canonical governors are aware that spiritual formation requires them to be open to the transcendent" (Interviewee E).

Some formators spoke of how they worked with people to engage them with the concepts without necessarily using the technical "churchy" language:

"We would call it the awareness of the presence of God within us but he [the course presenter] does not always use that. But he uses the language of going into the heart in order to be fed to be able to speak out, and that is what I think a lot of them see as spiritual formation." (Interviewee J)

One formator spoke of the difficulty in grasping the concept of transcendence:

"I guess I am not sure what [transcendent] means. I don't know if I have a judgement about that. Again it may be language. How do we connect the seen and the unseen? How do we connect meaning with work, let's say?" (Interviewee H)

5.6.2.2   Implications for Formation for Understanding the Transcendent

The low score for perception implied that, given it is considered a highly desirable awareness and understanding, some manner of bringing standard technical language of a significant aspect of the responsibilities of canonical governance, namely spiritual formation, is needed in formation.

5.6.2.3   Living United to the Word of God

The second sub theme in the Call to Spirituality concerned the understanding and place of the "Word of God".

Three survey items asked for responses involving the engagement with the Word of God and expected outcomes in spiritual development. The items are introduced briefly below as Tables 5.8, 5.9 and 5.10. Because of the integrated nature of the reflections of the interviewees on the three items, reflections are then analysed after the tables, making use of the integration of the responses.

The desirability of the trait of understanding the importance of being united to the Word of God was rated very strongly by survey respondents (Table 5.8). However, their perception that the understanding was in evidence was rated as Very High on the Likert-type scale by 9.78% of respondents and as High by 34.78%, giving a combined figure of 45%, less than half the figure for the equivalent items rating the desirability of this trait.

Table 5.8   Responses (%) relating to Canonical Governors' Understanding of Spiritual Formation and United with the Word of God (*N* = 92)

Canonical Governors understand that spiritual formation is about living intimately united to the Word of God			
Extent of agreement on desirability		Perceived degree of awareness	
	%		*%*
Strongly Agree	**45.65**	Very High	**9.78**
Agree	**43.48**	High	**34.78**
Disagree	7.61	Fair	32.61
Strongly Disagree	0.00	Low	9.78
No answer	3.26	Unable to Judge	5.43
		No answer	7.61

An outcome of the engagement with the Word of God on individual's faith and spiritual formation would be the impact on the individual's development with prayer and action for the neighbour (G. Kelly, 1998). The desirability of the trait of understanding the growth in love of God and neighbour was rated strongly by survey respondents (Table 5.9). However, their perception that the understanding was in evidence was rated as Very High on the Likert-type scale by 11.96% of respondents and as High by 38.04%, giving a combined figure of 50%, just over half the figure for the equivalent items rating the desirability of this trait.

Table 5.9   Responses (%) relating to Canonical Governors' Understanding of Spiritual Formation and Growth in Love of God and Neighbour (*N* = 92)

Canonical Governors are aware that spiritual formation aims for a daily growing in love of God and neighbour			
Extent of agreement on desirability		Perceived degree of awareness	
	%		*%*
Strongly Agree	**46.74**	Very High	**11.96**
Agree	**47.83**	High	**38.04**
Disagree	3.26	Fair	31.52
Strongly Disagree	0.00	Low	4.35
No answer	2.17	Unable to Judge	9.78
		No answer	4.35

A further outcome from the engagement with Word of God on the individual's faith and spiritual formation would be the deeper engagement with the practices and processes which are conducive to assisting such formation (O'Connell Killen & De Beer, 1994). The desirability of the trait of understanding the practices of prayer was rated very strongly by survey respondents (Table 5.10). However, their perception that the understanding was in

evidence was rated as Very High on the Likert-type scale by 16.3% of respondents and as High by 31.5%, giving a combined figure of 47%, less than half the figure for the equivalent items rating the desirability of this trait.

Table 5.10 Responses (%) relating to Canonical Governors' Understanding of Spiritual Formation and Practices of Prayer in Fostering Relevant Attitudes and Dispositions (*N* = 92)

Canonical Governors are aware that spiritual formation involves the practices of prayer and spirituality that foster these (above) attitudes and dispositions			
Extent of agreement on desirability		Perceived degree of awareness	
	%		*%*
Strongly Agree	**54.35**	Very High	**16.30**
Agree	**36.96**	High	**31.52**
Disagree	5.43	Fair	30.43
Strongly Disagree	0.00	Low	13.04
No answer	3.26	Unable to Judge	4.35
		No answer	4.35

The three items all returned patterns with significant differences between the desired and perceived traits. While the difference was of concern to interviewees, some were not surprised by the result:

"I am not surprised that there is a fairly big gap between the ideal here and the perceived reality simply because I think sponsoring institutions can be a little bit hesitant to say we think there is room for growth in your spirituality." (Interviewee D)

The interviewee attributed the low perception to a failure of institutes to be more proactive in engaging people in the task of spiritual development:

"I think they [leaders of Religious Institutes] are a bit hesitant ... because spirituality is often seen as a very personal thing and the pool of people who are prepared to respond to invitations to be part of canonical governors to my way of thinking tends to be fairly traditionally Catholic." (Interviewee D)

From this, the interviewee moved to express a view about the need for spiritual formation and the place of the Word of God in that formation:

"There is a spirituality around leadership for instance, and stewardship ...What we do need to do is to give people some nourishment into that, say from scripture [Word of God] so that this dimension of their life is developed." (Interviewee D)

However, it was important to commence with where people were in their lives with the spiritual journey:

"When one comes into a group of canonical governors, then I think it is important for the sponsoring agency to nourish the spirituality that governors already bring to the responsibility they are taking on." (Interviewee D)

Another interviewee expressed surprise at the result in the light of the formation program used in their organisation:

"I was kind of surprised that only forty-six per cent put it as strongly agree. I guess because we try to put over for ourselves and the people with whom we work, that this is a day by day approach to life. It is the way you grow spiritually." (Interviewee J)

Another interviewee saw the cause of the difficulty as a flow from the lack of engagement of the broader Catholic community with the call of Vatican II for engagement with the Word of God:

"I think that the issue of the Word of God, the scripture, even forty plus years after Vatican II, [is that] every adult my age is still not sort of steeped in that scripture, in the Word of God." (Interviewee H)

5.6.2.4   The Spiritual Journey

Interviewees saw one of the difficulties in the development of people for canonical governance flowing from the changing backgrounds of the people involved as more lay people were invited into canonical governance. The particular issue was the articulation of a spirituality that reflected the lay life of the people:

"The development of an appropriate lay spirituality for these groups is still very much in process. So the point of reference is still the founding sponsors, who are, in our case, religious women or religious men." (Interviewee H)

The interviewees also reflected on the meaning of spiritual formation and living intimately with the Word of God:

"I do not know how they would define spiritual formation. This could be a question of language." (Interviewee J)

"If we mean by that intimately united to the Word of God as Jesus – that kind of goes back to 'Do people have a personal spirituality?'; 'Are they living from a relationship with Christ that impels them to service?'". (Interviewee H)

The interviewees, particularly the formators among them, saw that an element of the spiritual formation process was inviting people to a process of introspection which opened them up to a deeper internal journey of discovery about themselves:

"The next one I think that they need to be open to something that is quite new to them, perhaps, or that is an area of growth for them." (Interviewee J)

"If I ask somebody about how you understand spiritual formation they would say they are opening themselves up to something within themselves that they were never aware of before, something deeper within them." (Interviewee J)

"We work with [the formator] and a lot of what he does is open them to seeing deeper within themselves, their own consciousness." (Interviewee J)

"I would expect this to be special "ah ha!" moments with certain issues or whatever, or moments where this [insight] would be different." (Interviewee T)

The interviewee gave an example of such a special moment:

"Examples of that would be determining the future of the ministry – what is the meaning of this work, and is it still God's work? Is this still what God wants? Are we still contributing to the ministry of Jesus Christ by doing what we're doing right now?" (Interviewee T)

A lay interviewee who was a canonical governor reflected on the benefit of the formation program that had been provided prior to taking up the role:

"But this opportunity over the last period of time has put it [relationship with God] a lot more in context, better understanding of what has been going on for a couple of decades. It maybe would have been better to find out about this a few decades ago but that is the way it is" (Interviewee I).

Another interviewee spoke of the need for openness to spiritual formation as underpinning the work of canonical governance:

"You would not put a superb surgeon in as a canonical governor simply because he was a superb surgeon if he did not have that other [spiritual] connection." (Interviewee C)

The interviewee proffered a reason for the need for a spiritual understanding in the role of canonical governance in the ministries:

"You do need a fairly high degree of faith to be prepared to operate in this industry. My own experience has been on a number of occasions where I think we have been saved by the grace of God." (Interviewee C)

Spiritual formation is a necessary underpinning because of the informed values that it brings to the decision making process in the light of the mission of the Church, for example:

"I would think in my experience a lot of the canonical type issues you face are issues of reflection." (Interviewee C)

The interviewees' responses supported the need of spiritual development for canonical governors as well as the place of spiritual development in a framework for formation.

5.6.2.5   Implications for Formation from the Call to Spirituality

Formation for understanding how to live a life united to the Word of God is an essential element which takes time to develop an approach to spirituality. Religious Institutes are required to devote years of preparation to their neophytes in a manner that is not possible for people in other walks of life. However, time is needed for the inner reflection as well as the intellectual strength to deal with the complex issues of the ministry.

Furthermore, there is a need to recognise that the change in approach and understanding of lay spirituality is needed to underpin the formation (Dolan, 2007; Fox, 2005b, 2010b; Fox & Bechtle, 2005; Hahnenberg, 2003; Muldoon, 2009; Wood, 2003). Aspects of this recognition would include the willingness to use some of the relevant "churchy" language for technical elements and to be prepared to lead people from where they spiritually are in their lives. This in itself requires people who are skilled in the field of spiritual formation to be able to lead the canonical governors appropriately.

5.7   Chapter Summary

This chapter has reported on the analyses of the Human and Spiritual Dimensions. This has been done using the reflections of interviewees of the data from the survey. A selection of the data was made available to interviewees. They were also invited to comment on a definition of "Formation" which had been created for the study.

Section 5.2 reported the process for sourcing the interviewees. Section 5.3 reported on the interviewees' assessment of the "reasonableness" of the definition of "Formation" which had been created. Their responses supported the definition. Section 5.4 reported the researcher's assessment with a short overview of how the interviewees had interacted with the data

concerning the reflections on the four dimensions of the proposed framework for formation. Section 5.5 reported on the data concerning the Human Dimension, exploring it through the factor analysis lenses of Human Maturity and Being Aware of Own Gifts. Section 5.6 reported on the data concerning the Spiritual Dimension, exploring it through the factor analysis lenses of Sense of Call to the Role and Call to Spirituality.

The interviewees, through their responses, supported the research questions and helped confirm the complexities of the area of canonical governance in the Human and Spiritual Dimensions.

Chapter 6 – Asking the Experts:
Interpreting Survey Responses – Mind and Action

6.1   Introduction

The purpose of this chapter is to report the analysis of the survey data applying to the Intellectual and Pastoral Dimensions in the light of reflection on the data by people with expertise in fields pertinent to canonical governance.

The survey data showed a discrepancy between the traits in the Intellectual and Spiritual Dimensions believed to be desirable and the degree to which they were in evidence in people involved in the role of canonical governance. The data also supported a proposed framework based on the intellectual and pastoral dimensions associated with formation.

6.2   Intellectual Dimension

The factor analysis of the Intellectual Dimension identified that the survey responses grouped into one factor, the "Catholic Intellectual Tradition", with high scores in Cronbach's Alpha (Desired = .858; Perceived = .906).

6.3   Catholic Intellectual Tradition

The factor analysis of the Intellectual Dimension suggested that there was a commitment to the intellectual dimension and, in particular, the Catholic intellectual tradition. Grassl (2009) posited that:

> an intellectual tradition consists of a style of thought and of a worldview, as its formal and material modes. The former defines the way knowledge is appropriated, processed and passed on whereas the latter amounts to its applications to various regions of reality – God, man, morality, society, the Church, etc. (p. 6)

From this, he posited that the Catholic intellectual tradition exists as a style of thought, at the centre of which "one may see the principle of sacramentality – the propensity to see God in all things (St. Ignatius) and to understand specific signs as vehicles of grace" (Grassl, 2009, p. 9):

The survey items grouped around four sub themes of Catholic Intellectual Tradition were "Journey to Theological Reflection", "Relevant Background in Theology for Canonical Governance", "Relevant Background in Theology for Ministry Implementation" and "Relevant Background in Canon Law for Ministry Implementation". The interviewees'

responses to the survey results were examined in the light of the theme of Catholic Intellectual Tradition.

At the broadest reflection, some interviewees were concerned that the survey responses for the Intellectual Dimension produced the lowest number of high scores in the Desired Traits as well as the Perceived Traits compared with the Human, Spiritual and Pastoral Dimensions. Sample reflections included:

> "The perception of theology is quite low. That is tricky. They did say that it is important. I do sometimes wonder how much theology to the role of governance, or juridic persons is important." (Interviewee L)

> "These are all consistent with the general lack of awareness of how the theological issues are relevant." (Interviewee F)

> "What did strike me I think that as I read it, intellectual comes out lower than everything .... [We might] think about this as good people with a spiritual life and a respect for the Church but with less intellectual understanding or training. That is kind of our profile for these people. It gives me a little heartburn − a lot of heartburn actually." (Interviewee P)

> "I think this is what it is saying here that you need to have some of these basic competencies if you are going to serve in this role." (Interviewee X)

This general concern for the low scores on the Intellectual Dimension was also reflected in the responses to particular items.

6.3.1   Journey into Theological Reflection

The desirability of the trait of understanding formation for ministry as a journey into theological reflection was rated very strongly by survey respondents (Table 6.1). However, their perception that the understanding was in evidence was rated as Very High on the Likert-type scale by 16.3% of respondents and as High by 25%, giving a combined figure of 41%, less than half the figure for the equivalent items rating the desirability of this trait.

Table 6.1   Responses (%) relating to Canonical Governors' Awareness of Formation for Ministry as a Journey into Theological Reflection (*N* = 92)

Canonical Governors are aware that formation for ecclesial ministry is a journey beyond catechesis into theological reflection			
Extent of agreement on desirability		Perceived degree of awareness	
	%		*%*
Strongly Agree	**52.17**	Very High	**16.30**
Agree	**38.04**	High	**25.00**
Disagree	6.52	Fair	29.35
Strongly Disagree	1.09	Low	18.48
No answer	2.17	Unable to Judge	5.43
		No answer	5.43

Some interviewees commented on the gap in the responses, for example:

"Very disappointingly low for sponsors, given their background that they wouldn't see theological reflection as absolutely core to how they do their work. That says there's a need for some work on that to some extent. It's a big disconnect in my mind." (Interviewee T)

"As I looked at these first of all there is definite recognition for need for training in terms of what is desired, versus what is perceived. But then the low rankings of even desired in the intellectual was surprising." (Interviewee P)

"I would have expected that to be as a desired trait something higher. For many Catholics their initial formation just opens their eyes to something beyond what they knew about their faith." (Interviewee J)

The response of the interviewees supported the need for formation in theology. The interviewees also commented on other aspects of the survey results and their own experience with theological reflection and forming people for theological reflection. These are analysed in the following sub-sections.

6.3.1.1   Varying Priority on Theological Reflection

There were different views among interviewees on the meaning and reasons for differences regarding involvement in theological reflection. These had to do with the priority that various Public Juridic Persons placed on theological reflection.

One interviewee believed that the difference reflected the reality regarding theological reflection:

"The thing about theological reflection, I think [is] that [it] must vary a lot from group to group. That is built into our mission statement..... But when we talk to other PJPs, the issues of theological reflection are not as strong. So I sort of agree with these numbers here." (Interviewee H)

Another interviewee was aware of conscious work being undertaken elsewhere:

"I know some brand new PJPs are focussing specifically on that question of how they theologically reflect on the work they do, and how they take some of the normal business stuff and are able to manage it in that light ... so I think they are taking it very seriously." (Interviewee T)

The range of responses indicated that theological reflection is not necessarily a part of all current formation programs for canonical governance formation.

6.3.1.2   Difficulty with Church Language

Some interviewees saw difficulty with Church language which may explain low levels of desired and perceived behaviour. Some examples are:

"There would be some governors who, to my way of thinking, would be saying, 'well what the devil is catechesis and what is theological reflection?'" (Interviewee D)

"Again this is the language issue for me ... The language is a language which is more than the words. It is more than what you say you are doing. It is actually a part of the journey into your own self understanding and relocating your place in the eyes of God." (Interviewee E)

"So I'm just saying when you look at those questions that use the heavy church theological language, I would expect that they would be low." (Interviewee N)

Issues around Church language permeated this research. The major question related to what meanings of what terms do those in positions of canonical governance need to understand and perform the role effectively. In formation for canonical governance the need for an acquaintance with the basic terms in Church meanings to undertake the governance of ministries was seen as an issue.

6.3.1.3   Understanding the Practice of Theological Reflection

The practice of theological reflection may be occurring but may not be recognised as such as one interviewee noted:

> "Theological reflection is a practice that not too many of us consciously engage in or know that we are engaging in it." (Interviewee D)

Another interviewee expressed a concern that theological reflection was basic to the governance role:

> "You cannot do it unless you are moderately literate in the theological reflection on the ministry." (Interviewee F)

This interviewee, in giving the rationale for the claim, linked it back to the place of the ministry in the mission of the Church:

> "Because if you are running a hospital and you do not have a sense of the caring ministry of Jesus, the nature of the holistic person, how to meet the needs of people's spirituality in the context of health care, then you are not governing a Catholic health care facility." (Interviewee F)

6.3.1.4   Personal Encounter with Theological Reflection

One interviewee, a member of a Public Juridic Person, reflected deeply on the personal journey to theological reflection when commenting on the survey item responses:

> "It did make me reflect back. Maybe I did not understand what I was doing at the time because I just took it as well. The opportunity is there. You take it." (Interviewee I)

This interviewee was able to speak about aspects of their journey:

> "You reached out in your relationship with God and you are not sure if anything is there, or if there is anyone listening, or whatever. My sense has always been to keep on rolling along. Then see what happens. For me fortunately in so many different ways the outcomes have been all right. But this opportunity over the last period of time has put it a lot more in context, better understanding of what has been going on for a couple of decades. It maybe would have been better to find out about this a few decades ago but that is the way it is." (Interviewee I)

The interviewee was able to make a link between the theological journey and the development of a sense of vocation:

"This is not an intellectual thing, being a canonical governor ... There is kind of a lot of other stuff in there. So unless you feel that, well, there is something here you kind of have been called to do." (Interviewee I)

The interviewee was also able to speak of the influence of their journey of theological reflection on their spiritual formation:

"There is no doubt I have been, in my experience that I have shared, brought closer to the Gospel. But I am not a theologian or a scholar; I am a servant and maybe there is a certain level of the catechesis that I have had through the way I have been brought up, and there is more reflection on the Gospel where I am." (Interviewee I)

The interviewee also noted that one of the difficulties was finding time to become more aware:

"Given the practicality of things, my role as a canonical governor is a part-time role, whereas at times I think maybe I would like to have some more intellectual reflection on theology, [but] there are only so many hours in the day. I am balancing a number of lives." (Interviewee I)

Another interviewee spoke of the place of reflection in the canonical governance work in a particular Public Juridic Person:

"In terms of being a trustee, as a trustee you are not making decisions on day to day matters. You are talking a long-term, high level milieu in which the organisation operates and I do not think you can involve yourself at that level without significant reflection." (Interviewee C)

The interviewee explained how the process operated:

"Our trustees have an hour's reflection before every meeting to try and frame the meeting so I think that is what we need to do. And it [low survey scores] surprises me. I cannot see how you cannot do that in terms of canonical governance." (Interviewee C)

Another commented that:

"It's interesting that others don't see [theological reflection] as expressed very well but I think it should be. It also has implications for the organisations that they sponsor, how they sell them for their executive leaders and boards and all the rest of it. How it's done and how board does it." (Interviewee T)

These interviewees' responses supported the need for canonical governors to be able to engage in theological reflection in coming to their decisions.

6.3.2   Faith Rooted in Scripture and Tradition

The Catholic faith is based on a belief in the revelation of God as expressed in the Old and New Testaments, commonly called the Scriptures. There is a need to understand and interpret the scriptures as the Word of God for the application to the current times. It is a basis for theological reflection (O'Connell Killen & De Beer, 1994).

The desirability of the trait of understanding faith being rooted in Scripture was rated very strongly by survey respondents (Table 6.2). However, their perception that the understanding was in evidence was rated as Very High on the Likert-type scale by 14.13% of respondents and as High by 38.04%, giving a combined figure of 52%, just over half the figure for the equivalent items rating the desirability of this trait.

Table 6.2   Responses (%) relating to Canonical Governors' Understanding of Catholic faith being Rooted in Scripture ($N = 92$)

Canonical Governors understand that the Catholic faith is rooted in God's revelation			
Extent of agreement on desirability		Perceived degree of awareness	
	%		*%*
Strongly Agree	**51.09**	Very High	**14.13**
Agree	**44.57**	High	**38.04**
Disagree	3.26	Fair	30.43
Strongly Disagree	0.00	Low	8.70
No answer	1.09	Unable to Judge	4.35
		No answer	4.35

Interviewees spoke of the importance of understanding the place of Scripture and revelation in the governance role. For example:

"I think [canonical governors] ought be expected to very consciously think about the Gospel dimensions of decisions that they make and how they impact on the lives of the people the decision is going to effect. So, to me it is a vital element of formation for canonical governance." (Interviewee D)

The interviewee set out the relationship between the Gospel and theological reflection:

"Theological reflection in a sense is reflecting upon my actions in light of the Gospel. How do my actions actually line up with the Gospel, and it is consciously sitting down and doing that." (Interviewee D)

One interviewee was able to indicate the influence that the formation in theological reflection had had on the decision making processes in their governance responsibilities:

"The experience has been that the influence of some of the decisions and some of the issues that are around us has had some influence on the gospel [passage] that has been chosen for the situation." (Interviewee I)

The Catholic faith is also based on the belief that the Tradition, the long history of interpreting the Scriptures, is also a foundation (McBrien, 1994). The desirability of the trait of understanding faith being embodied in the Tradition of the Church was rated very strongly by survey respondents (Table 6.3). However, their perception that the understanding was in evidence was rated as Very High on the Likert-type scale by 13% of respondents and as High by 41.3%, giving a combined figure of 54%, just over half the figure for the equivalent items rating the desirability of this trait.

Table 6.3   Responses (%) relating to Canonical Governors' Understanding of Catholic faith being Embodied in the Tradition of the Church ($N = 92$)

Canonical Governors understand that the Catholic faith is embodied in the living tradition of the Church			
Extent of agreement on desirability		Perceived degree of awareness	
	%		*%*
Strongly Agree	**48.91**	Very High	**13.04**
Agree	**45.65**	High	**41.30**
Disagree	3.26	Fair	31.52
Strongly Disagree	0.00	Low	5.43
No answer	2.17	Unable to Judge	4.35
		No answer	4.35

Interviewees did not address comments specifically to the item of understanding the tradition. The responses spoke of the two elements of "Scripture and Tradition" and the analysis has embraced both elements.

These responses from interviewees with a range of backgrounds in canonical governance supported the need for those in governance positions to be able to engage in theological reflection, and to apply the learning from such reflection to their decision making processes. Such needs should form the focus of formation programs and incorporate elements from both Scripture and Tradition.

6.3.3   Appreciation of Faith through Intellectual Formation

Survey respondents were asked about faith being developed through intellectual formation.

The desirability of the trait of understanding an appreciation of faith through intellectual formation was rated strongly by survey respondents (Table 6.4). However, their perception that the understanding was in evidence was rated as Very High on the Likert-type scale by 5.43% of respondents and as High by 33.7%, giving a combined figure of 39.1%, less than half the figure for the equivalent items rating the desirability of this trait.

Table 6.4   Responses (%) relating to Canonical Governors' Appreciation of Faith through Intellectual Formation (*N* = 92)

Canonical Governors seek to develop their appreciation of the Catholic Faith through intellectual formation			
Extent of agreement on desirability		Perceived degree of awareness	
	%		*%*
Strongly Agree	**30.43**	Very High	**5.43**
Agree	**59.78**	High	**33.70**
Disagree	2.17	Fair	36.96
Strongly Disagree	2.17	Low	11.96
No answer	5.43	Unable to Judge	4.35
		No answer	7.61

Interviewees expressed a range of concerns at the survey responses.

6.3.3.1   Place of Intellectual Development

Some interviewees expressed concern about the place of intellectual development for the role of governance, for example:

"In stepping back and looking at this under this category of 'intellectual' again it is saying, I think, there is a lot more education that needs to be done, or development of competencies that need to be done around canonical governance." (Interviewee Z)

"If you are going to be a competent governor of a Catholic juridic person you should have more intellectual formation for the role." (Interviewee G)

One interviewee linked the low results to the need within formation programs for a more significant component of the Intellectual Dimension:

"There seems to be an overall appreciation [of the desirability of] for the intellectual component, but the low perception scores would underscore the need for an understanding and intellectual component in the development programs." (Interviewee P)

6.3.3.2　Place of Intellectual Engagement

Other interviewees reflected on the importance of intellectual engagement of the canonical governors:

> "Again if I look at the seven people around the table, they get it that we have to be lifelong learners. And they are lifelong learners in a variety of areas." (Interviewee H)

The significance was further spelt out with regard to a particular national issue at the time of the interview:

> "I want everybody around that table to be reading practically everything that is coming off the press. So to me, intellectual, or going in that direction, is very important. So that is a big discrepancy it seems to me as well." (Interviewee H)

This view was supported by another interviewee concerned at the discrepancy between the survey results:

> "They seek to develop their appreciation of the Catholic Faith through intellectual formation – that is the part where we exchange information as well as formation and I think they are very receptive to it. Here again it surprises me that we see it low as an expectation, as a desired trait." (Interviewee J)

6.3.4　Intellectual Formation

For the purpose of this study, intellectual formation was seen as a development process that involved coming to a deeper understanding of the knowledge of theology and Canon Law and how to apply the knowledge and understanding to decision making in canonical governance. If theology and Canon Law are the fields of expertise for a canonical governor, then it is important for the canonical governors to develop knowledge of these areas and their capacity to apply this knowledge in their role. For example, one interviewee expressed a view about intellectual formation as a pre-requisite for the role:

> "I would hope that people who are invited to join, or who feel called to join that type of leadership, would have had a really good intellectual formation already." (Interviewee R)

The interviewee went on to expound on what the level might be:

> "I would think it was solid, and when I say solid, what I mean is – well my expectation anyhow would be that they ... would have had some grounding, not necessarily a PhD in

theology, but I would hope that they have more than the average Catholic – let me put it that way – understanding." (Interviewee R)

Another interviewee reflected on the idea of levels of intellectual development in theology, and the difficulty of "pitching" the content at the appropriate level:

"I often run into problems – at least challenges – from the boards I work with because I really feel we have to introduce the laity who are in these roles to some serious theology. It is not going to be graduate level but the boards and some of the other leaders want a whole lot of reflection. They kind of get stuck at the personal reflection stage of it, which is important. So I do not know how we are going to get beyond that." (Interviewee X)

Another interviewee grappled with the level of theological knowledge by comparing it with the requirement for knowledge of finance for senior managers:

"I think there is an element of saying you have to have some basic understanding of this if you are going to serve. A CEO [may] not have a degree in finance necessarily – it might be in healthcare administration. But in health administration they probably learnt enough about finance to know what questions to ask ... but you are going to be in trouble if you are a CEO and you do not have any knowledge of finance nor think it is important." (Interviewee Z)

Interviewees supported the need for canonical governors to have an appropriate level of intellectual formation to lead the ministries. This was seen as an essential underpinning for theological reflection.

The question of what is appropriate intellectual formation was addressed by the interviewees in several ways. First, assessing the level of expertise was an issue noted by some interviewees. For example:

"Even on our [National] board, we ask people to say what are their areas of expertise and at one point there were people who signed that said that they thought they had an expertise in ethics. That went everywhere from one course workshopping, it to one person who had a masters. Nobody who said this had a PHD. You know what? No doctor would say that he had an expertise in something unless he had clearly been board certified." (Interviewee R)

Several interviewees noted that the intellectual theological formation for the religious who had been serving as canonical governors in the past was not always adequate for the responsibility. Sample quotes included:

"Looking from the historical perspective of religious life, they did not look at these things back then, they just assumed and if you were a congregational leader you were elected because you had these abilities. But people didn't." (Interviewee X)

"I don't know that everybody that has been in leadership roles in congregations has had all of the theology... it was very ministry oriented." (Interviewee P)

One formator interviewee made a similar observation:

"In my experience with religious that I am aware of, a lot of them don't have very strong backgrounds in theology. They have enough in particular or certain things but it's not a very deep." (Interviewee T)

Another formator interviewee reflected on the implications of religious canonical governors not understanding the responsibilities of the role:

"There were people serving [as canonical governors] who did not know what they did not know. It borders on somewhat of an ethical issue for me when we say that we are the responsible party for stewarding this ministry but we are not capable of doing it." (Interviewee Z)

The interviewee noted that there was a responsibility to form religious who are currently being asked to be involved as canonical governors whether in their own institute or in one of the new Public Juridic Persons:

"Sisters are not at the table just to do the opening prayer and make sure the mission piece is being powered. We also have a share of the responsibilities and we have to prepare ourselves and educate ourselves and inform ourselves about those things so we can steward to the best of our ability." (Interviewee Z)

One interviewee reflected on the level of formation they had undertaken in theology, the time involved and the understanding achieved:

"I am comfortable that I am not expected to be a theologian or I am not going to spend my time at a Catholic institute [doing courses]." (Interviewee I)

As well as appreciating the personal theological formation, the interviewee was also appreciative of the gifts of the group of canonical governors:

"I look around ... at my fellow canonical governors and see that ... there are complementary skills, complementary gifts. Where I am obviously lacking in some things, there are other persons that are quite high." (Interviewee I)

Other interviewees reflected on the awareness of theological knowledge and concern at articulating theological ideas in public:

"We [lay people] are not terribly comfortable quoting Scripture. We are wary of being seen as unqualified preachers. We tend perhaps not to venture into that area, especially outside of our own peer group." (Interviewee A)

Another interviewee spoke of the lack of connection for lay Catholics between the scriptures and the ministerial action:

"I have a sense that for lay Catholics the work is often not as connected with the Scriptures as other people. I do not think that makes the work any less valuable or profound." (Interviewee E)

Another reflected on the lack of knowledge and understanding of theology in lay Catholics:

"I think that's right not because I think they would disagree with the desired trait but because they do not understand it. 'I have no understanding of this. I have got this far without understanding it'." (Interviewee C)

While the passion for involvement in the activities of healing and teaching ministries of the Church is evident, the survey results confirmed the desirability of an intellectual understanding of the religious underpinning of the actions of these ministries and this was strongly supported by the interviewees.

6.3.5 Relevant Background in Theology for Canonical Governance

The responses of the interviewees to the survey item results on ecclesiology and missiology are reflected on in the next sections.

6.3.6   Some Background in Ecclesiology

The desirability of the trait of understanding the need for some background in ecclesiology was rated strongly by survey respondents (Table 6.5). However, their perception that the understanding was in evidence was rated as Very High on the Likert-type scale by 2.17% of respondents and as High by 31.52%, giving a combined figure of 33.6%, less than half the figure for the equivalent items rating the desirability of this trait.

Table 6.5   Responses (%) relating to Canonical Governors' Need for Background in Ecclesiology (*N* = 92)

Canonical Governors need to have some background in ecclesiology			
Extent of agreement on desirability		Perceived degree of awareness	
	%		*%*
Strongly Agree	**40.22**	Very High	**2.17**
Agree	**46.74**	High	**31.52**
Disagree	10.87	Fair	39.13
Strongly Disagree	0.00	Low	15.22
No answer	2.17	Unable to Judge	7.61
		No answer	4.35

Some interviewees thought the term ecclesiology as not one that people would have been used to, for example:

"These are fairly sophisticated theological concepts. Even to say to a mature lay person, who is a governor, 'what is your ecclesiology?' would [leave them bemused]." (Interviewee D)

Interviewees took different perspectives on the issues at the heart of the survey results, though all agreed that a background in ecclesiology was important. For example, another noted:

"I think most people would not know what ecclesiology is." (Interviewee E)

One interviewee provided a rationale for some background in ecclesiology:

"I certainly think you need some background. You cannot be involved in governance as a canonical governor without some background in what the Church is, how the Church is structured, how the Church is governed [and] where the bits of the Church all fit together." (Interviewee F)

This view was supported:

"First of all the perceptions are very low. That is striking I think, very low. If I were answering this, being an ecclesiologist, I would put ecclesiology higher, as more

important, because it is how we relate to the Church and what is the authority of the Church." (Interviewee V)

Another interviewee expressed concern as to whether the survey respondents fully appreciated the importance of an understanding of ecclesiology:

"You absolutely have to have a background in ecclesiology and that is a pathetic figure there of forty point two per cent who strongly agree. You have ten per cent who think you can be a canonical governor without any background in ecclesiology. It is like saying you can be a doctor without any background in medicine. It is very worrying. How can you govern a Church agency without understanding what the Church is? It could be that the people who answered the question did not quite grasp what it meant." (Interviewee F)

The researcher noted that, of the 92 people who responded to the survey, at least 70% had experienced several years of formation in either a seminary or a Religious Institutes novitiate in which it would be expected that courses in ecclesiology would have been undertaken. In this light, the above concerns expressed by Interviewee F take on even greater significance. These concerns were echoed by others, for example:

"I think some of the most important issues healthcare faces today are ecclesiological. Not that there are not important bioethical questions, but I think the big picture about how these ministries will be a part of the church in the future. I think those are important. So the differences here are pretty dramatic." (Interviewee X).

One interviewee expressed concern at the lack of knowledge of models of Church if ecclesiology was not understood:

"The ecclesiology actually is a red flag for me. Whether we talk in the most simple way about the Avery Dulles models of the Church, I think people do have to have a sense that there are different ways to view the Church and different ways that the Church expresses itself." (Interviewee H)

However, the interviewee saw a positive possibility from the results:

"I see that as a big opportunity for growth." (Interviewee H)

This view was shared by another interviewee:

"I think if they come to governance without a strong understanding or background in ecclesiology, that to me is not something that hinders, but it is a place where we can do

a lot of work. And probably there is a lot of need in our discussions to try to come to an understanding of working in that context." (Interviewee J)

There was also reflection from interviewees on how much could be expected for people to learn:

"The question is how much can you realistically expect from people who have not devoted their whole lives to this [the study of the Church]?" (Interviewee X)

"People run away because it is hard work. You know, 'I am a lawyer already, a doctor, a psychologist, a social worker and that is my professional arena. Ecclesiology belongs to the Church and I will do my best to understand what I can'." (Interviewee E)

One interviewee reflected on the place of ecclesiology in a formation program in the following terms:

"It is very important to us because it is going to impact on the culture and the mythology that is so important about our particular organisation – that the people have something to look to. It is the kind of light we are following within the Church, but there is a particular bent that we have and that is what we are promoting. So we have to understand that. Ecclesiology is more than the Canon Law stuff." (Interviewee I)

There was a range of views on what intellectual formation in ecclesiology might entail for canonical governors. However, there was general agreement that some knowledge of Church is required to understand the purpose of ministries in the light of the mission of the Church and further that canonical governors can be expected to articulate those understandings.

6.3.7   Some Background in Missiology

The desirability of the trait of understanding some background in missiology the need for was rated strongly by survey respondents (Table 6.6). However, their perception that the understanding was in evidence was rated as Very High on the Likert-type scale by 2.17% of respondents and as High by 26.09%, giving a combined figure of 28%, less than half the figure for the equivalent items rating the desirability of this trait.

Table 6.6   Responses (%) relating to Canonical Governors' Need for Background in Missiology (*N* = 92)

Canonical Governors need to have some background in missiology			
Extent of agreement on desirability		Perceived degree of awareness	
	%		*%*
Strongly Agree	**29.35**	Very High	**2.17**
Agree	**47.83**	High	**26.09**
Disagree	16.30	Fair	33.70
Strongly Disagree	1.09	Low	20.65
No answer	5.43	Unable to Judge	9.78
		No answer	7.61

The responses of interviewees reflected a level of confusion with regard to the concept of missiology. For example, one interviewee who had strongly advocated a need for an understanding of ecclesiology stated:

"I think that would be too hard a question because I am not sure I would understand what missiology meant." (Interviewee F)

Another interviewee expressed the same thought differently:

"Tell me a little bit more about when you say 'missiology'. Does that relate to the ecclesial community, or what is that?" (Interviewee T).

Another interviewee had a similar question:

"How would you define missiology? I mean I have to be honest. I am a clinician and I don't think in terms of that language." (Interviewee N)

Another interviewee expressed a need for further explanation:

"You probably would have had to tell us a little more about missiology perhaps. Anyway I am not surprised that that [rating] is low." (Interviewee J)

Another interviewee referred to a particular group who might struggle with the meaning of missiology:

"There are people in religious life who don't have a grasp of what missiology is. So I think it is a fairly tall order to expect that governors, fresh on the block, will have handles on missiology." (Interviewee D)

Some interviewees thought the term "missiology" implied overseas missionary activity:

"I would use the word mission. Missiology to me refers to what it is that people who go to foreign countries do when they embark on planting the Church in a new place." (Interviewee V)

The interviewee expanded on their reflection:

"Missiology is maybe a little too 'area based' to expect board members, or canonical governors [to understand]. We are not into proselytising with these ministries. Missiology means a lot of different things. I would not want it to proselytise." (Interviewee V)

One interviewee, who had responded to the survey, reflected on the response that had been made at that time:

"I think I was probably thinking too narrowly and not thinking around the mission of the Church, you know the mission of evangelisation of Church. I would probably rethink that one myself." (Interviewee H).

The interviewee then reflected on missiology as the study of the mission of the Church:

"If by missiology we mean the mission which underpins the operation of ministry that was a big surprise for me because to me, that is critical in even recruiting these folks, orienting these folks." (Interviewee H)

The interviewee expanded on why this understanding was seen as important:

"This is way more than work. It is way more than a public service, and I mean anything, health care, education, social services. It is about the mission." (Interviewee H)

That reflection led to an observation on the discrepancy in the data:

"So that ninety per cent think that is important and thirty-five per cent not seeing it in evidence. That is a biggie." (Interviewee H)

There was some reflection on how important it was for canonical governors to recognise and define "missiology" compared with the key ideas underpinning it and the practices that are associated with it. For example, one formator interviewee asked:

"I mean, how many Catholics would you know that you can ask to define missiology? I do not think they would be likely to have a clue. They would probably think it had something to do with going to the missions. I don't know I do not want to disparage them but where would they have ever learned that." (Interviewee X)

This view was reflected by a canonical member interviewee:

"We do not ask the question about missiology because we have an entirely lay organisation. It does not come into conversations. It has never been mentioned, for example, in my church that I go to, ever. So how would people ever have a language for it? But for me I think it is important. But we do not talk about it as a missiological understanding or appreciation." (Interviewee E)

For Interviewee N, who had questioned the meaning of the term, the researcher provided a brief explanation of missiology as the study of the mission of the Church. The interviewee then offered this response:

"I think as you've explained it, I suspect that had it been defined like that, the responses would have been different." (Interviewee N)

The interviewee went on to outline the reason for the opinion:

"Because our understanding the mission of an organisation, the charism of an organisation, call from God and the response to call – that is all areas of attention and focus that would be right at the top of those who are preparing people, at least in our experience." (Interviewee N)

The concern for the mission of the Religious Institutes was significant in the reflection of another interviewee:

"I think it is important when somebody takes on the responsibility of public juridic person status that they do know what they are on about or what the whole project is on about. That this is a way of continuing the mission of a congregation and to understand what that is all about." (Interviewee D)

The interviewee spoke of the link between understanding the mission of the Religious Institutes and the mission of the Church:

"[In order to] shape concepts that help delineate, or help identify, what mission and ministry and Church are all about. I think it is important." (Interviewee D)

One interviewee reflected on the implications of the survey response for formation:

"The one thing that I wondered about was missiology. I mean that was really low and fairly low even in the thinking that it was an important trait. I wondered whether that

has caused you to question how to work with that in terms of formation." (Interviewee L)

Interviewees highlighted the need for the term "missiology" to be clearly described. The responses from the interviewees indicated the need for missiology as an aspect of theology to be better understood as part of the intellectual formation for canonical governors.

6.3.8 Relevant Background in Theology for Ministry Implementation

The survey asked about the use of the theological sources of Scripture and Tradition in discerning the signs of the times. The underlying point was that for the ministry to be relevant to the mission of the Church, changes may need to be made in the ministry. These changes need to be made in the light of the signs of the times. This may take great courage if the perceived changes are significant.

The desirability of the trait of understanding the use of theology to help understand the signs of the times was rated strongly by survey respondents (Table 6.7). However, their perception that the understanding was in evidence was rated as Very High on the Likert-type scale by 6.52% of respondents and as High by 28.26%, giving a combined figure of 34.7%, less than half the figure for the equivalent items rating the desirability of this trait.

Table 6.7   Responses (%) relating to Canonical Governors' Use of Theology to Help Understand the Needs of the Time and the Role of Scripture and Tradition ($N = 92$)

Canonical Governors use theology to help understand the needs of the time in the light of Scripture and Tradition			
Extent of agreement on desirability		Perceived degree of awareness	
	%		*%*
Strongly Agree	**38.04**	Very High	**6.52**
Agree	**53.26**	High	**28.26**
Disagree	5.43	Fair	29.35
Strongly Disagree	1.09	Low	22.83
No answer	2.17	Unable to Judge	8.70
		No answer	4.35

Interviewees expressed concern at the low awareness rates. A sample quotation:

"I am just so struck by how low these perceptions are." (Interviewee V)

Some interviewees linked the use of the sources of theology with the responses to theological reflection:

"I would connect that one again with the theological reflection because I think that is what this is − to understand the needs of the time in light of Scripture and Tradition.

Arbuckle says that to meet the needs today is to make the leap from the Acts of the Apostles to today. To me that is theological reflection and it is asking a lot of people actually." (Interviewee H)

The interviewee further reflected on the implications for this in relationship to the perceived scores:

"So I think I can understand why people might rate that a little lower." (Interviewee H)

One interviewee spoke from the experience as a formator and getting people to use the sources:

"From my perspective, being a theologian, [this] is the most important thing for me ... I think sometimes when I do work with the board members – there are sometimes moments when they realise how little they know about these things." (Interviewee X)

Another interviewee stressed the significance of understanding the sources of theology – Scripture and Tradition:

"Canonical governors use theology to help understand the needs of the time in the light of Scripture and Tradition. I think that is enormously important." (Interviewee J)

The interviewee went on to articulate the reason for the opinion:

"It is that whole part of the integration. Where do you ground your thinking and your reflection that is going to lead you to action?" (Interviewee J)

The interviewee then reflected on the difficulties for those who lacked some background in theology to operate in an appropriate manner:

"I think those who have little or no background in theology have a harder time dealing with that and that speaks to the huge success of these programs like the XX Institute where people are going in search of a three year program to ground themselves in the faith and Scripture, Tradition and ecclesiology and a whole lot of other things." (Interviewee J)

The results from the item highlighted the concerns of interviewees who were theologians, for example:

"We have to think this out theologically before [we act]. We are kind of putting the cart before the horse in a way. We are going to have to go back and do the theology because, in many cases, the governance structure has been set up. I think there has been some

theological reflection about it but not adequate to what we are dealing with here."
(Interviewee X)

The response of interviewees supported the need for canonical governors to understand and appreciate the Catholic intellectual tradition and the interplay of Scripture and Tradition as it underpins their decision making.

6.3.9 Relevant Background in Canon Law for Ministry Implementation

The survey asked for a response about the need for canonical governors to have some background in Canon Law. The desirability of the trait of understanding that governors needed some background in Canon Law was rated strongly by survey respondents (Table 6.8). However, their perception that the understanding was in evidence was rated as Very High on the Likert-type scale by 2.17% of respondents and as High by 20.65%, giving a combined figure of 22.8%, much less than half the figure for the equivalent items rating the desirability of this trait.

Table 6.8   Responses (%) relating to Canonical Governors' Need for Background in Canon Law ($N = 92$)

Canonical Governors need to have some background in Canon Law			
Extent of agreement on desirability		Perceived degree of awareness	
	%		*%*
Strongly Agree	**31.52**	Very High	**2.17**
Agree	**47.83**	High	**20.65**
Disagree	18.48	Fair	42.39
Strongly Disagree	0.00	Low	25.00
No answer	2.17	Unable to Judge	5.43
		No answer	4.35

One interviewee spoke of the need and responsibility to understand Canon Law to undertake canonical governance:

"I find that amazing. In that, certainly as a trustee, I see one of my primary responsibilities is compliance with Canon Law. You cannot comply with it unless you have a background or understanding of it." (Interviewee C)

The interviewee elaborated the reasons for the need to understand:

"These organisations are part of the Church. They are as much a part of the Church as any diocese or parish and they are subject to Canon Law. It is like saying can you govern a civil company disregarding civil law and your obligations under civil law. You cannot do it. Or if you try, you put yourself at huge risk." (Interviewee C)

Another interviewee was more accepting of the discrepancy in the results:

"I am not surprised. Who reads Canon Law? We have this requirement that people have an appreciation of and a minimum understanding of Canon Law." (Interviewee E)

Another interviewee spoke to the importance of some background in Canon Law:

"And do I think it is important, because you do not have to be a canon lawyer to have an appreciation of where Canon Law fits within Church." (Interviewee A)

An interviewee spoke of a background in Canon law as part of basic literacy for the role of canonical governor:

"How can you be a canonical governor unless you have a sense that this thing that you are governing is part of a broader Church? So you need a basic literacy in the theology, Canon Law and pastoral sensitivity." (Interviewee F)

The sense of the holistic need and the place in the Church governance was also reflected on by Interviewee C:

"You cannot govern canonically I think unless you have a very sound understanding of the theology of the human person. This is in healthcare, and that has to be from the Catholic Tradition." (Interviewee C)

This comment was an example of the inter-relatedness of the dimensions. The governance requires a theological understanding in a manner which will also impact on the Human and Pastoral Dimensions:

Interviewees expressed concern at the lack of understanding and formation in Canon law. For example:

"It is so poorly understood. It is almost looked upon as a barrier and a hundred and one reasons not to do this." (Interviewee A)

Interviewee C spoke from experience of lack of formation in Canon law in leadership groups:

"The understanding of Canon law that I find amongst my colleagues as trustees and directors is minimal. They cannot get their heads around the fact that they are subject to legal systems and even senior clergy struggled with the concept of a PJP." (Interviewee C)

The interviewee elaborated on the difficulty with senior clergy in the role:

"We found that one of our biggest challenges is actually forming the Bishops in this regard. Some of them of course are canonists and have that understanding. But those that are not – that come from different aspects, different backgrounds – I think really struggle. ... I think that they did not really have an understanding of what [the PJP] was, where it was placed and their role in relation to it." (Interviewee C)

The interviewee also made comparisons with non-clergy:

"And the laity struggle even more." (Interviewee C)

Two interviewees spoke of their awareness of the lack of understanding of Canon law:

"I would not even know where to start with Canon law ... It is kind of the basic structure of Canon law even that most people would not have a clue." (Interviewee E)

"Again I see more of my own inadequacy in a way in some of the more intellectual stuff around the Church. I have been told I should not have to worry about it ... [but] there are certain things I seek to do by trying to read stuff." (Interviewee I)

Several interviewees spoke of the need to form an adequate understanding of Canon Law for canonical governors. Sample quotes included:

"I am surprised in terms of the reaction but I think it is an area that needs huge development." (Interviewee C)

"I think that [Canon Law] is a formation need. It is not a question of saying that 'Canon 453-2 says this' because that is not what it is about." (Interviewee A)

One interviewee reflected on the place of Canon Law in the developing formation programs:

"Well they have noted that that is a lack in the preparation of lay ecclesial ministries and they are beginning to address it in programs. But there had not been anything on Canon Law previously." (Interviewee L)

Another interviewee spoke of efforts that had been made in their organisation to address the issue:

"We brought [a canonist] out for a formation. One session does not make a canon lawyer. But he sets a nice framework I think." (Interviewee H)

Given that the research set out to seek formation needs for canonical governance, the fact that the item on Canon Law returned the lowest score in the survey responses suggested that there was a significant need to engage canonical governors in the intellectual requirements of understanding the law and its place in the Catholic intellectual tradition.

6.3.10 Need for Intellectual and Theological Formation

The responses to the Catholic Intellectual Tradition items of the survey were analysed in 6.3. The survey invited response to the ecclesiological and missiological aspects of theology and the scores were lower in this dimension than in any other dimension. Several of the interviewees were concerned at the lower ratings for the intellectual dimension; and addressed it specifically in terms of the need for content in formation programs:

> "Something that just jumped out at me is that if you look at formation [needs] the human spiritual and pastoral scores [are] comparable it is the intellectual one that is the lower both in the desired state and in the perceived reality." (Interviewee N)

This interviewee reflected on why this might be the case and saw the possible emphasis on spiritual formation (at the expense of other dimensions) as one reason:

> "There is probably more of the sensitivity and awareness to their personal spiritual acting out, pastoral, and less of [the theological]. Maybe [there is] more of a need therefore [for a] more formal context [for formation] for them." (Interviewee N)

In reflecting further on the likely cause, the interviewee saw a pattern in recent formation programs in relation to the intellectual dimension:

> "When you look at the newly formed members of sponsored groups, they have only had small spatterings of these events of the intellectual component. That is why I am not surprised that those numbers are lower." (Interviewee N)

Another interviewee also reflected on the balance between spiritual development and intellectual formation:

> "It suggests to me that there is a need for more intellectual content in the programme than not. I have heard arguments that the primary thing needs to be the spiritual formation of those who fulfil the role almost to the, well I won't say exclusion, but definitely the lessening of intellectual content. That is troubling to me." (Interviewee P)

The interviewee reflected further on the need for the intellectual component as a basis for informing ministry action and the leadership of the canonical governors:

> "Some ability to understand the intellectual pieces of it in order to fulfil the role [is needed] – that is both interest and ability. Because someone who really does not want to do that – only wants to reach out – I think this is more rigorous. I think this is a little more rigorous role than that." (Interviewee P)

A third interviewee also saw urgency for action from the survey results:

> "Well I just think it means we have a lot of work to do. The theological perspective is probably the one that is highest for me." (Interviewee X)

Interviewees P and X articulated why they saw the theological dimension as essential. Because the ministries were involved in the mission of the Church, canonical governors needed to understand why the theology is relevant. Interviewee X, after expressing concern for the priority of theology, went on to link the concerns with the responsibility to the Church and one's personal understanding of their vocation to the role:

> "[The theological perspective] and, in terms of understanding one's own personal commitment, that it is not just a board. This is something much more serious – a more serious responsibility [to the Church]. That it is an expression of one's own vocation." (Interviewee X)

The view was supported by the reflection of Interviewee P:

> "I think the programmes need to be clear up front about that and the people being invited to serve. What role do we play in inviting people and making it possible for them to give to the Church and to the world? [Until] we get over this thing about it being our [Religious Institutes] ministries, then they are not doing us a favour. We are offering them an opportunity to fulfil themselves through this vocational response to the ministries." ((Interviewee P)

This observation highlighted the difficulty that current "governance incumbents" have in articulating the theological relevance and substance of their work to those who being invited to the role and who come from different backgrounds of lay spirituality, as well as from outside operation of the ministry.

6.3.11 Governance Formation for Members of Religious Institutes

The research focussed on the formation needs for people undertaking canonical governance roles in the Public Juridic Persons. The expectation was that the main focus would be lay people, as members of the Religious Institutes had been conducting the governance previously and in many cases, for centuries. However, as noted in 6.3.4, the issue of lack of formation for canonical governance for members of Religious Institutes also surfaced.

This issue was particularly addressed by an interviewee who was a formator and had previous experience on a Religious Institutes leadership team, in the following terms:

> "Do we just assume that they were formed in their early religious life and they have the basis of that and there has never been any ongoing formation?" (Interviewee Z)

The interviewee reflected that the early religious formation for members of the institute did not include formation for governance, and added that formation in this area needed to be part of ongoing formation:

> "Coming from the perspective of a religious congregation, those who are elected to congregational leadership are those who end up serving as canonical governors for ministries. I certainly can say from my experience that they have not been well trained to serve in those roles." (Interviewee Z)

There was concern that formation for leadership had not been part of the planning in the institutes or seminaries:

> "So we cannot assume that the sisters and brothers and priests, by virtue of who they are and their commitment, have what it takes to be canonical governors. There are people coming into the community, coming new into service and healthcare that need the same type of training and formation that I think we are looking at for lay ministry right now." (Interviewee Z)

The interviewee had had experience of leaders of Religious Institutes seeking help in the area of canonical governance, (or sponsorship as it is called in some circles):

> "I was struck last year when a number of congregational leaders were coming up to me and saying 'Tell me more about sponsorship. How do you become a sponsor?'" (Interviewee Z)

The exchange supported the matter of this research that a broader and deeper understanding of the nature and practice of formation for canonical governance is needed as

new people come into leadership of any Public Juridic Person, whether it is a Religious Institutes or a separately established ministry and whether these people are members of the laity or Religious Institutes:

> "One of the things is they have an annual workshop for new leaders and they do things on HR, on civil law, on a variety of different things, and said the importance of including, of being part of the curriculum, something on an understanding of canonical governance." (Interviewee Z)

The interviewee saw the formation as a necessary part of human integration, since what the person was being called to in leadership needed some specific formation. This research investigated what might need to be part of that formation:

> "I am wondering if there is a gap in their own religious formation, even in preparation saying 'how do you live an integrated spirituality?'. I think this is what this is getting at: how do you bring that into your own spiritual life, your own formation about what you do if and in your own personal prayer?" (Interviewee Z)

The interviewee reflected further on the point that human integration contributes to the holistic development of the person:

> "To me this is saying something about your own prayer life, even though you don't use those words, that is how I interpret this. That it is not rated that high for even desired which I think is unfortunate, because if you are not in touch with that there is a disconnect between what you are providing in service to the ministry that you are overseeing as canonical governor and it not being integrated into your own spirituality and your own life of prayer." (Interviewee Z)

6.3.12 Implications for Formation for Canonical Governors in the Intellectual Dimension

The implications for formation in the Intellectual Dimension appeared to be profound and urgent. Survey responses and interviewee reflections highlighted the need for a clearer understanding of the place that the Catholic intellectual tradition in Church ministries. Capability in the Intellectual Dimension enables canonical governors to articulate the reasons for the activity in the name of the Church in the mission of God. These elements researched in the Intellectual Dimension were drawn from the elements proposed in the intellectual dimensions of the Church documents for formation needs for priests and ecclesial laity. These were seen as standard basic requirements. The survey results supported the desirability of

these capabilities. The reported awareness indicated that further work is needed to achieve the desired result.

6.4 Pastoral Dimension

The factor analysis of the Pastoral Dimension identified that the survey responses grouped into two elements of "Understanding Responsibility for Catholic Identity" and "Formation for Canonical Governors". Data have been analysed in terms of these elements.

6.4.1 Understanding Responsibility for Catholic Identity

Factor analysis found that understanding of the responsibility for Catholic identity grouped with several items, including the need to discern the signs of the times for the mission of the Church, and understanding the responsibility for the spiritual life of the ministry. These were seen by survey respondents as elements which contributed to the creation and sustainability of "Catholic identity" and therefore needed to be understood by canonical governors as part of their leadership and their responsibility for governance.

Following is an analysis of the range of related issues identified by survey respondents and interviewees associated with the need for canonical governors to understand their responsibility for Catholic identity in their agencies.

6.4.1.1 Developing and Sustaining Catholic Identity

The desirability of the trait of understanding the awareness for responsibility for Catholic identity was rated very strongly by survey respondents Table 6.9). However, their perception that the understanding was in evidence was rated as Very High on the Likert-type scale by 32.61% of respondents and as High by 43.48%, giving a combined figure of 76%.

Table 6.9 Responses (%) relating to Canonical Governors' Awareness Responsibility for Catholic Identity (*N* = 92)

Canonical Governors understand their responsibility for the ongoing Catholic identity of the ministry			
Extent of agreement on desirability		Perceived degree of awareness	
	%		*%*
Strongly Agree	**73.91**	Very High	**32.61**
Agree	**22.83**	High	**43.48**
Disagree	0.00	Fair	18.48
Strongly Disagree	1.09	Low	2.17
No answer	2.17	Unable to Judge	1.09
		No answer	2.17

Subsequent interviews elaborated that, in fact, simply understanding Catholic Identity was not in itself sufficient and that persons in positions of PJP governance should also be participants in the Catholic Church and know the tradition of Catholic Church:

"If you are not prepared to sign-up to the Catholic Church, well how can you be a steward of the Catholic Church?" (Interviewee I)

Several interviewees reflected from their own organisational experience at canonical governance and board level. One outlined the systems in place to ensure that the Catholic identity was a central consideration in the leading and operation of the ministry:

"To give a practical example, our board committee [structure] for the health system – we have a committee for clinical quality; a committee for finances; a committee for strategy; we have a committee for mission and governance. So it is parallel." (Interviewee V)

Another interviewee made it clear that in their organisation, the Catholic identity was linked to the ministry being a work of the Church:

"For us, we continually refer to the fact that we are at a particular place within the Church; so 'within the Church' is important to us, and it is 'big C' [institutional] Church which you have there too."(Interviewee I)

One interviewee likened the concept of Catholic identity to the purpose of creating Public Juridic Persons:

"See the canonical governance in your new public juridic persons, the idea has been to maintain Catholicity, hasn't it?" (Interviewee G)

The interviewee reflected on a recent discussion on formation about Catholic identity in their organisation with regard to Catholic education:

"[The presenters] who were running it are from [overseas], from a system which is entirely secular now. They were saying that we are far better than [their country]." (Interviewee G)

This positive view was attributed to the impact of the Religious Institutes and their commitment to Catholic identity.

"We are fortunate in that, our big secondary schools, when you have a Loreto tradition, or a Christian Brothers', or a Marist Brothers' tradition, the school is affected by that. Everyone is aware of it. They are continually reminded of it." (Interviewee G)

However, the interviewee expressed concern at maintaining the Catholic identity in Catholic secondary colleges where there either never had been the involvement of a religious teaching institute, or the link had been lost:

"In a Catholic college it is not nearly as easy to do that." (Interviewee G)

The implication was that it is more difficult for Catholic laity to lead Catholic secondary schools and maintain Catholic identity in systemic settings where there had been no previous involvement of Religious Institutes. However, the interviewee was speaking of the operational level of the ministry. This research focussed on the needs for the canonical governors whose task it is to oversee the ministry. It raised the question of how to ensure that those at the operational level (teachers, nurses, managers, principals,) and those at governance level understand "Catholic identity" and take responsibility for nurturing it.

6.4.1.2 Being a Catholic

The need to be a participating member of the Catholic Church in the governance role to understand what was required to maintain and nurture Catholic identity was highlighted by one interviewee:

"You would have to question those juridical bodies that are not insisting that their governors are going to be signing up to the Catholic Church." (Interviewee I)

The interviewee reflected further on the issue:

"We might have some issues with the authority in the Catholic Church, but in terms of the public identification I think really it is a fundamental ... I would have trouble contemplating a non-Catholic in this particular position that I hold. And that is not out of lack of respect. But it is just that you have been invited to make some decisions and to participate in something that is where the foundation is the Catholic Church." (Interviewee I)

The issue of the Catholicity of governors was touched on in several aspects of the research. It was dealt with more fully in Section 5.6.1.2.

6.4.1.3 Knowing the Catholic Tradition

One of the interviewees involved in governance of a healthcare ministry reflected on the cause of the concern about the laity ensuring the Catholic identity of the ministries and was critical of the Church for the lack of integrated education and nurture in people's lives:

"Do you know one of the things I have become aware of ... is the Catholic Church's failure, and I call it failure, at a very early age, to engage its members with the richness of that tradition in a way that is meaningful for their lives." (Interviewee E)

For example, the interviewee was critical of the lack of formation of governors and other senior staff:

"Most of the people that we engage with as governors are directors and governors and senior staff who are Catholic and they have had no formation ever in their lives. All they can remember, a lot of them, are the Ten Commandments and hellfire and damnation as an alternative to salvation." (Interviewee E).

This reflection shared the opinion of Interviewee G quoted elsewhere that too many lay Catholics still saw God as an old man in the clouds with a beard.

The two interviewees (E from a lay background and G from a clerical background) expressed the concern that in both health and education, there was the danger of a lack of people with appropriate background to understand their own catholicity and the implications of that for maintaining the Catholic identity of the ministries. If their concept of God was narrow and constrained, the concept of Catholic identity would likewise be narrow and constrained.

A further aspect of understanding Catholic identity was seen as the ability to discern the signs of the times to see what the needs might be for the Church to address as part of the mission of God.

6.4.1.4   Discerning the Signs of the Times for Mission of the Church

The call for the Church to scrutinise the prevailing environment for its mission – the "signs of the times" – was made in the Vatican document, *Gaudium et Spes* (Abbott, 1966d, n 4). The expectation is that the Church would then seek to interpret the signs in the light of the Gospel and act for the good of God's kingdom.

The desirability of the trait of understanding canonical governors' awareness of discerning the signs of the times for the mission of the Church was rated very strongly by survey respondents (Table 6.10). However, their perception that the understanding was in evidence was rated as Very High on the Likert-type scale by 15.22% of respondents and as High by 35.87%, giving a combined figure of 51%, just over half the figure for the equivalent items rating the desirability of this trait.

Table 6.10 Responses (%) relating to Canonical Governors' Awareness of Discerning the Signs of the Times for the Mission of the Church (*N* = 92)

Canonical Governors work together to discern the signs of the times for the mission of the Church			
Extent of agreement on desirability		Perceived degree of awareness	
	%		*%*
Strongly Agree	**59.78**	Very High	**15.22**
Agree	**34.78**	High	**35.87**
Disagree	1.09	Fair	35.87
Strongly Disagree	1.09	Low	7.61
No answer	3.26	Unable to Judge	2.17
		No answer	3.26

One interviewee reflected on the capacity of canonical governors to discern the signs of the times in the light of the Gospel and act accordingly:

"They have a serious responsibility there. Does this particular ministry credibly and authentically express the Gospel in this particular place? Now there are measuring sticks for that if I can put it that way. They have to know what makes the thing authentic, or where it is departing from being authentic or Gospel or Church." (Interviewee D)

The interviewee went on to express concern about the level of formation of lay people to be able to understand the responsibilities they were undertaking for the mission and developing and sustaining Catholic identity:

"[Lay people] may be a little bit hesitant to embrace wholeheartedly unless they are given some formation in that area, or in those areas." (Interviewee D)

Another interviewee expressed the difficulty of ensuring that the basics of mission were addressed:

"The demands of organisational governance now are so huge, unbelievably huge that to distract people, which is what it feels like very often, with the requirements for thoughtfulness about missiology or thoughtfulness about ecclesiology is almost like – it is too hard for them." (Interviewee E)

A number of the interviewees spoke from their experience of their own ministries. One spoke of how the organisation articulated the relationship between planning and action and the values of mission which underpinned it:

"My experience is that in this organisation we have a framework which every significant decision has to run past. And it is all directed to missiology." (Interviewee C)

The interviewee indicated that the organisation's philosophy articulated integrated governance, leadership, structures and performance. These functions were also expected to be reviewed and to ensure the organisation remains faithful to its core purpose.

Another interviewee spoke about the importance of mission and discernment in their organisation:

> "I think that most people who are going to be in the role of governance and in my experience when I'm thinking about ours, it is a constant that they are looking at the signs of the times." (Interviewee N)

The interviewee expounded on the implications for this from involvement of the ministry in a changing world vision to action in planning:

> "If you are doing any strategic planning then you have to be looking at the signs of the times. Again I think that it is not just the sign of the times for the mission of the Church but it is the signs of the times in the world in which we live." (Interviewee N)

Discerning the signs of the times in light of the world in which we live is at the heart of the mission. The message comes from the Founder, Jesus Christ, who instructed his disciples to take the healing and teaching message of the good news of the Kingdom of God to the whole world (Mk 16:15, Mt 28:19).

6.4.1.5   Understanding Mission

The issue of canonical governors seeing "mission" as the mission of the ministry rather than the ministry being an expression of the mission of the Church was raised by two interviewees. One, a formator, noted:

> "The thing that I would wonder about is, [whether] they do it about mission for the Church or for their own mission. And I don't know the answer to that." (Interviewee R)

The interviewee further reflected that they often heard people saying they worked for the mission of the Church, when in fact they were looking at mission in the light of one particular ministry:

> "Clearly I think it [mission of the Church] is obviously important. But many times, what I will hear is people who will [seem to] discern that, but they are looking at it particularly in light of the one particular ministry." (Interviewee R)

A canonical governor interviewee reflected from an individual experience.

"I believe that we have formed [canonical governors] for the mission of the health system. Continuing to put that in the context of the mission of the Church is the challenge. I think we have language that does it, but [I don't know] whether we have formed people enough for the big mission of the Church." (Interviewee H)

The concern raised by the interviewees was a major one. If only the mission of the ministry was being considered by people, it could be seen as equating to an attitude of generously helping the sisters in the Religious Institutes more than understanding the mission of the Church.

The second interviewee reflected further on the attitudes in their organisation towards understanding the mission of the Church which is working for God's mission:

"I think the folks we are with both at the canonical level and at the governance level – the system board level – they get the thing about the mission of the health system. They really get that and they are really committed to that. But then if we were to draw back and say how does that fit into the mission of the Church?" (Interviewee H)

Each of these interviewees expressed a concern for the core concept of mission of the Church as the reason for existence of the ministries and where canonical governors were up to on the journey in the light of changes in governance in the ministries:

"I think the notion of doing so in looking at the [mission of the] broader Church – I do not know that we have gotten there yet." (Interviewee R)

"We use the language of the healing ministry of Jesus but that is not always 'the connect' to the mission of the Church." (Interviewee H)

These concerns were of major importance to this research. The question has been asked about the preparation of people for the canonical governance for Church mission. This suggested that failure to understand the Church mission meant the point may well be being missed in the enthusiasm of people to help in the Church ministries.

This concern regarding action without appropriate background knowledge and appreciation of the deeper purpose of agencies was reflected upon by interviewees in the matter of the intellectual gifts needed to discern the signs of the times appropriately. This was taken up in the following section.

6.4.1.6 Having Intellectual Aptitude for Discernment

The consideration of what might be involved in discernment and the place of intellectual understanding in such discernment was noted by one interviewee:

> "We talked a lot about discernment as a sponsorship competency but I would argue that discernment cannot be devoid of understanding, of intellectual understanding. You know it is not the whole of it certainly but there has to be some basis there that you are working out of." (Interviewee P)

This caused the interviewee to reflect further on what might be involved in the requirements for canonical governors and introduced the term "aptitude".

> "The aptitude for the intellectual component [needs to be] considered in the choice of persons to invite to this role. I don't think we have ever talked about that. I think we assume it. I never thought of it as an aptitude for [discernment], but it might well be." (Interviewee P)

The implications of this reflection might be that discernment not underpinned by adequate and appropriate intellectual understanding of the issues, will be shallow readings of the issues and therefore miss significant elements of the meaning of Catholic identity.

6.4.1.7 Being Open to Discernment

Another interviewee had concerns about the kind of discernment of the signs of the times currently being done by Church leaders and the difficulties lay leaders might encounter with some attitudes:

> "[Lay spiritual discernment] is a great ideal but there are a lot of church leaders, *a la* Bishops, and even congregational leaders who are not looking at or listening to the signs of the times." (Interviewee D)

The interviewee expanded on the claim:

> "[They] already have a set agenda that they are not prepared to change or vary from, so bugger the signs of the times in a sense. We know what is orthodox and we are going to hold the line come hell or high water." (Interviewee D)

The interviewee then reflected on the implications of the claim in the formation of people to be lay canonical governors:

"So, it is a brave thing to educate 'mere' lay people to listen to or look for the signs of the times and then to say to other Church leadership, or to say to clerical Church leadership, or to religious congregation leadership that we need to go in this direction or we need to shift our focus." (Interviewee D)

This response indicated the potential tension for leadership in the future direction of the Church in changing times in the difficult task of discerning the signs of the times in the light of the Gospel.

6.4.1.8 Being Responsible for Spiritual Life of Ministry

Another aspect regarding Catholic identity was seen as understanding the responsibility for the spirituality of the ministry to ensure that the ministry continued in the mission of the Church.

The desirability of the trait of understanding canonical governors' responsibility for spiritual life of ministry was rated very strongly by survey respondents (Table 6.11). However, their perception that the understanding was in evidence was rated as Very High on the Likert-type scale by 13% of respondents and as High by 32.61%, giving a combined figure of 45.6%, less than half the figure for the equivalent items rating the desirability of this trait.

Table 6.11 Responses (%) relating to Canonical Governors' Understanding of Responsibility for Spiritual Life of Ministry ($N = 92$)

Canonical Governors understand that they have a responsibility for the spiritual life of the ministries			
Extent of agreement on desirability		Perceived degree of awareness	
	%		*%*
Strongly Agree	**51.09**	Very High	**13.04**
Agree	**41.30**	High	**32.61**
Disagree	2.17	Fair	38.04
Strongly Disagree	1.09	Low	10.87
No answer	4.35	Unable to Judge	1.09
		No answer	4.35

One of the difficulties noted by interviewees was the manner in which spirituality is expressed. Cleary (2009) had examined the different symbolic expressions in the various Catholic human services of education, health and welfare, noting that the articulation of the spiritual through displayed symbols decreased from Catholic schools where statues and writings were evident to Catholic welfare sites where there was little public sign of the Catholic identity. The responses of interviewees reflected some of the difficulties Cleary had noted.

A health ministry governor interviewee stated:

"When we talk about communicating with the people who work for us and with us there is almost a need to homogenise the gospel so that it is not being seen as too Catholic." (Interviewee A)

One of the difficulties at the operational level was associated with the variety of religious backgrounds of staff:

"In your workforce if you have fifteen per cent practicing Catholics you are doing very, very well." (Interviewee A).

This response raised the issue of the level of catholicity required to promote effectively the spirituality of the ministry and ensure the Catholic identity. In reflecting further, the interviewee addressed the issue of the development of appropriate language for the expression of the gospel message:

"There is that – cultural cringe is not the right word. There is a desire to bring [spirituality] into more humanitarian language than gospel language, I think. It does not mean to say that gospel teachings are not underpinning the humanitarian message. To relate it to biblical and gospel teaching is something I do not see an awful lot of." (Interviewee A)

This preference for "humanitarian language" raised questions as to what spirituality does and should underpin the work of the canonical governors as they grappled with their responsibilities for ensuring the Catholic identity of the ministry.

These reflections on the responsibility of canonical governors for spirituality raised thoughts in interviewees about the measurement or evaluation of the canonical governors' involvement and the difficulties in the task of taking over the spirituality of the ministry from the Religious Institutes which had formerly conducted the ministry.

Some quotes on the matter of the evaluation of the governors' involvement included:

"I think we are going to have to grow into this [understanding responsibility for spirituality]. When I look at more and more of these formation programs popping up I think it is very important. But I think we need to step back and assess along the way." (Interviewee Z)

The interviewee proposed involving people who had been involved in Public Juridic Persons for an extended period in designing and evaluating processes:

"Even to go back to those who have worked in canonical governance as a lay person, and there are some folks out there who have been doing it for the past 10 years. Talk to them about it now 10 years later and ask what does this say to you? How is this evolving? I think that is an important piece of this as we look into the future." (Interviewee Z)

Assessing how and the extent to which canonical governors are effective in exercising their responsibility for the spiritual life of the ministry requires an informed contemporary understanding of Church mission as distinct from the mission of the Religious Institutes and the charism which has inspired the operation of the ministry in former times.

6.4.1.9   Acknowledging Tension between Mission and Charism

The spirituality of Religious Institutes and their involvement with particular charisms can sometimes cause tension and threaten division among those who espouse a commitment to the mission. One interviewee saw evidence of this

"I do see a lot of reference to the founders and foundresses almost turning organisations into followers of a particular individual or a charism of a particular congregation or group. That bothers me a little bit because I think it is counterproductive in the broader sense. I think it actually creates divisions between a number of our organisations." (Interviewee A)

The interviewee reflected on the source of the stories for spirituality being dominated by the charism rather than the Scriptures:

"I think there is a tendency to use the stories of the founders far more than the stories from the gospel." (Interviewee A)

The implication of this approach meant that the organisation might find itself not discerning the signs of the times in the light of the Scriptures and not understanding a scripture-based spirituality which is necessary for the continuation of the ministry with Catholic identity. An interviewee who was a formator from a Religious Institutes spoke of the journey that was being undertaken to bring about the needed understanding, both from the point of view of religious moving out of the governance and the formation of people to take over the role and understand the responsibility of governance:

"I mean that is what we have been doing. That is what we have been chipping away at. That has been a journey because, canonical governance, not only structurally in the Church, has been tied into the religious congregations." (Interviewee P)

This reflection provided insight into the difficulty of moving from a spirituality infused by a charism of a Religious Institutes which was lived by the members of the institute and shaped the operation of the ministry to a different basis. That new basis is a spirituality which will involve people brought up with a lay spirituality but who wish to be involved with the ministry in which a Religious Institute's charism will also shape the spirituality of those who lead the ministry as they are formed for the role of canonical governance.

The spirituality will need to be articulated and visible in the ministry with the ensuing capacity to be accounted for as appropriately expressing the mission of the Church.

6.4.1.10   Being Accountable for Spirituality and Identity

The implications of being responsible for the spirituality and identity of the Church agencies are far reaching. One implication would be that such responsibility required an appropriate accountability structure. As one interviewee put it:

"I think that probably one of the biggest challenges that we face for the future in terms of structure, is that you need accountability and a review mechanism." (Interviewee C)

The interviewee saw that the canonical governors would operate in accordance with best practice in governance and be in a system which supported such practice:

"Canonical governors should be reviewing their own performance and their own contribution to the organisation in the light of their role. And there needs to be a process whereby if they are not making an appropriate contribution, they can be held to account." (Interviewee C)

The interviewee expressed concern about the long term appropriateness of some current accountability requirements in the model of Pontifical Public Juridic Persons which reported to the Vatican:

"My fear is that in the future, particularly with pontifical PJPs, the accountability lines become quite stretched. If you are accountable to Rome and someone goes to Rome once a year and spends half an hour or an hour reporting on a significant entity in [another country], I do not think that is accountability. I think there needs to be regular

communication with an alternate reviewer that has the power to appoint or replace [people] to canonical governance." (Interviewee C)

Such accountability arrangement would be dependent upon appropriate formation for canonical governance so that people understood their responsibilities and what they were accountable for, including Catholic identity and the spirituality of the ministry.

6.4.1.11   Recognising Canonical and Civil Roles

A further issue for canonical governors relating to Catholic identity can flow from the canonical structure of the Public Juridic Person and the associated civil structure for operating in the civil world. In some cases, the canonical governors also have responsibilities as civil governors or trustees, and in other cases, act as the board as well. One difficulty arises where they are required to form themselves for the responsibilities for spirituality of the ministry as canonical governors and, in evaluating the leadership of the ministry, find that they are evaluating themselves in several roles. One interviewee articulated the issue:

"I think there are difficulties in what do you call the sponsorship role, the trustee role, the governor role. Then actually the formation at the next level down and the next level down and the next level down from my point of view is as important if not more important." (Interviewee E)

In this case, the canonical governors are responsible at all governance levels. But the responsibility for spirituality in the ministry lies firstly with them as canonical governors. A difficulty, which this model highlights, would be that there are limited senior groups in leadership to offer counsel or challenge to the canonical governors.

Another interviewee pondered on the same issue:

"This is just a wondering [whether] people struggle with a difference between the canonical governor and the board of trustee in the role sometimes. Sometimes I think they blur those roles too much." (Interviewee Z)

The interviewee indicated that "multiple roles" was becoming more common and outlined what needed to be done to distinguish canonical and civil responsibilities:

"What we are finding here with the new juridic persons is that the sponsor board [canonical governors] and the board of trustee are becoming one and the same. So there is going to have to be a tremendous amount of work of understanding that you cannot

get so caught up in the fiduciary responsibility of being governor and lose what it means to be canonical governor." (Interviewee Z)

The complexities outlined indicate that many elements need to be to be considered in the formation for canonical governance with regard to understanding Catholic identity and understanding the responsibility associated with being accountable for the Catholic identity.

6.4.1.12   Implications for Formation for Canonical Governance

The analysis of the theme of nurturing Catholic identity in the ministries for mission indicated that formation needs to ensure that people grasp the significance of the role of the mission of the Church. Canonical governors need to be able to articulate it as good news for the recipients of the ministry. The people employed to enact what the ministry proclaims to be seeking to do in the name of the Church require formation.

There is a significant need to ensure that people understand the relationship between the mission of the Church and the mission of the ministry. The latter may need to change in the light of discernment of the needs of the times.

6.4.2   Process Issues in Formation for Canonical Governance

The second element to arise from the factor analysis of the Pastoral Dimension was the preparation and selection of people for canonical governance in light of the responsibilities associated with undertaking the role. Among these responsibilities are relationship with and accountability to the Church with regard to the local Bishop.

The responses of the interviewees were examined in the light of the survey items related to formation and selection of canonical governors, and relationship with the Bishop. A related issue concerned the order of formation and selection. It is unclear as to whether people were being selected for formation to become canonical governors in the future, or whether people had been selected as canonical governors and were then expected to be involved in some sort of formation. The reflections indicate that both processes are evident.

In the following discussion, a range of issues associated with the process of formation for canonical governance are addressed.

6.4.2.1   Criteria of Formation for Individuals for Canonical Governance

Respondents were invited to consider the criteria for formation for canonical governors. These criteria were to be mission based. The explanation of "mission-based criteria" was

defined by the researcher as referring "to principles of decision making drawn from Catholic Social Teaching and charisms which have underpinned the ministries and which are applied, evident and demonstrated in the ministry context".

The desirability of the trait of understanding that canonical governors' use of mission-based criteria for canonical governor formation was rated very strongly by survey respondents (Table 6.12). However, their perception that the understanding was in evidence was rated as Very High on the Likert-type scale by 11.96% of respondents and as High by 33.7%, giving a combined figure of 45%, half the figure for the equivalent items rating the desirability of this trait.

Table 6.12 Responses (%) relating to Canonical Governors' Use of Mission-based Criteria for Canonical Governor Formation (*N* = 92)

Canonical Governors use mission-based criteria in forming future governors			
Extent of agreement on desirability		Perceived degree of awareness	
	%		*%*
Strongly Agree	**50.00**	Very High	**11.96**
Agree	**40.22**	High	**33.70**
Disagree	3.26	Fair	30.43
Strongly Disagree	1.09	Low	11.96
No answer	5.43	Unable to Judge	5.43
		No answer	6.52

One interviewee summarised the difficulty of finding appropriate people who would meet the defined mission-based criteria to be future canonical governors:

> "No, I mean it is just a big hill to climb and the first part of formation for canonical governance is finding the people, recruiting them." (Interviewee V)

The interviewee outlined the elements involved in what they saw was required – willingness, ability and background:

> "Where do we even find these people who would be willing to undergo this formation, who have the natural gift for it, the background?" (Interviewee V)

Another interviewee spoke of the human qualities which would contribute to the process of governance:

> "In any governance you have to have healthily developed human beings, rounded human beings. First and foremost I think you have to make sure you attract people who can function in a group; can relate as part of a team and that they are people with interests beyond this particular entity. So your selection processes have to be good." (Interviewee D)

These views highlighted some of the potential difficulties when selecting individuals for canonical governance.

6.4.2.2   Approaches to Formation for Canonical Governance

Interviewees spoke of two approaches to formation. One approach was the involvement of formal programs where possible candidates for canonical governance were involved in a structured program in preparation for consideration as a canonical governor. A sample quote regarding formal programs included:

> "There are programs such as the XX and YY and so on. These are programs that have a beginning, middle and an end. Like an overall orientation, four weekends over sixteen months." (Interviewee V)

The researcher had the opportunity to take part in one of the weekends of the named programs and speak to the organisers. In this example, the participants were undertaking the program in preparation for being considered to be canonical governors in one of several Public Juridic Persons.

The second approach to formation noted by the interviewees was ongoing formation. This approach includes learning as issues arose, or preparing people by inviting possible future governors to the meetings of the current canonical governors to learn what was involved and assess the suitability of people being considered as well as the people assessing their sense of vocation to the role:

> "We are bringing on interns and let them see what the role of the PJP is and whether or not they think this is a call for them and if they can contribute to it in a meaningful way." (Interviewee J)

A related factor with regard to selection arises where new members were being sourced from internally from the ministry from board members and former employees. This was the standard procedure when the ministries were the responsibility of the Religious Institutes as only members of the Religious Institute could be members of the governing body.

There was much comment about ongoing formation from interviewees and the rationale for such formation:

> "If you have only [the formation course], [then] people will have something to tick off. You know, 'I have had that formation, now I am done. I have gone through that

program'. This is something that is supposed to be ongoing, like a core curriculum." (Interviewee V)

This concern about the limitations of formation as primarily about "going to courses" was voiced by other interviewees, for example:

"What bothers me about formation as I have seen it to this point in time is that it has been to me more like a journey of going to courses. Which is OK. That is good. I do not denigrate the importance of that. But it is almost as if 'Well, I have been to the course. Now I am going back to work'." (Interviewee A)

This insight highlighted the tension between the impact of a course for formation which was intended to give grounding for ongoing formation and a sense that an individual saw no connection between the course and the way they operated in the ministry. Interviewee V suggested that such tension may be eased by altering the format of meetings:

"At every one of our board meetings we take 30 to 40 minutes for formation and that never ends." (Interviewee V)

And added that

"The canonical governors are part of the board. They are a sub-set of the board. So the whole board is getting it and so is the canonical governance. They are never finished." (Interviewee V)

Some interviewees expressed concern if selection for canonical governor roles included compulsory formalised formation. For example:

"One of the things that troubles me and it came from my last retreat actually was the notion that before you form a PJP the members should have undergone one, two, three years, or whatever of formation." (Interviewee E)

The interviewee spoke of how ongoing formation for the governors in their organisation also incorporated regularly scheduled formation programs:

"We have biannual formal retreat formations as well as our stewardship formation which is bimonthly." (Interviewee E)

To this point, the particular organisation had not had an externally designed and delivered course for formation. Rather the process was run internally. While the interviewee spoke of board formation, the board members carried canonical responsibility:

"We had two Sisters who headed up the stewardship and they were responsible, with the director of mission, for growing the formation for all board members."

And added:

"There was also the requirement that people were Catholic, understood a bit of Canon Law and had an appreciation of the role. I think that was sufficient personally." (Interviewee E)

The interviewee spoke of criticism which had been addressed to the organisation for this method of formation:

"The accusation that has been offered to me is that they should not have done that without having organised a solid period of formation prior to establishing the PJP." (Interviewee E)

The interviewee was, however, quite convinced of the appropriateness of the method of formation that had been used:

"What I can absolutely say without a shadow of doubt is that, unless the formation that we have done had been done in the way we have done it, we would not have as strongly formed a board as we have. If we had had to choose only from people who had undertaken a programme of formation previously, we would not have the richness that we have." (Interviewee E)

However, the interviewee was open to the possibility of some formal externally developed formation:

"But at the same time it would be really good to have some formation opportunities that people could buy into." (Interviewee E)

The seriousness with which formation was being undertaken, and the discernment of the need for change was evident from the interviewee's reflection on formation for the future:

"We will move to some new formation needs and have to provide new opportunities." (Interviewee E)

The interviewees spoke of the need and experience of formation and the challenge and appropriateness of providing timely, initial and ongoing formation opportunities for current and prospective canonical governors.

These comments underpinned the need to provide appropriate high quality formation for canonical governance. Such formation will need to take account of the changing circumstances and processes and be lead and delivered by different groups and individuals from what has happened in the past. As one interviewee put it:

"Many of whom were formed, as I was, by sisters or brothers and bring them on as the next tier of succession of governance. But we do need an extensive formation program." (Interviewee C)

The research supported the claim that there needed to be a strong formation program for potential governors and a commitment to ongoing formation enrichment in the role to ensure the mission of the ministries was sustained.

6.4.2.3   Adult Education Approach to Formation

Connolly's (2002) research on elements of canonical governance formation showed that the approach needed to be based on the principles of adult education. Such principles include that the formation programs acknowledge background knowledge and experiences in previous and current roles.

In their reflections about the range of formation programs, interviewees emphasised that approaches needed to be based on the principles of adult education. For example:

"Many people who are moving into a canonical governance role have a skill set in one area and there is a learning process in the other. There are some areas that when you look at a whole organisation they may have more work to do in one area versus another." (Interviewee N)

Another interviewee reflected on their formation experiences and the help that they had been given in understanding the human integration of spiritual and theological learnings with the skills and understandings brought to the role from work life:

"To me it is about trying to understand the theological and the spiritual and all of the other implications of everything that you do every day. [Finding ways of] bringing all of those other aspects more genuinely into all of the practical things is important." (Interviewee A)

Another aspect of the educational approach was the need to recognise the different perspectives which lay people with decades of background brought to the formation process. One interviewee highlighted the point with an example:

"I think the first challenge is with the people who are doing the formation. Sister XX has written an article and in it she said one of the men ... said 'are you trying to make us mini novices?'" (Interviewee L)

The interviewee made the point that part of the acceptance of adult education is the realisation that the person may have developed a particular spirituality without the usually accepted language that is used in the field:

"I think that it has to be different in terms of lay people. There has to be some points of focus that take account of the fact that grace works in their lives within the relationships that are central to their own lives rather than in the community that they become part of in the ministerial work of governance." (Interviewee L)

The insight expressed here was helpful in distinguishing the basis of formation for life and ministry. The members of the Religious Institutes who ran the ministries were formed to live in community and work together in ministry. Often, the focus was on the ministry as the source of satisfaction for living and the community was a base to come from and go to. The point made here was that, for lay people, the starting point was the relationships in their lives. It was the gift they brought to the ministry. The interviewee clarified the point:

"It is not unimportant that community. But you cannot conflate the points of emphasis of religious life and the points of emphasis of lay life." (Interviewee L)

Hence, adult education needs to recognise the spiritual journey that people bring to the formation process. Differences of the background can be expected to lead to differences in the outcomes:

"Some lay people have a sense of we cannot do this the way the sisters did it. The answer is no, you are not supposed to. Find your way of doing this." (Interviewee L)

Another interviewee not only spoke of the need to employ adult education principles, but also specified a particular area of sacramental theology as needing attention in formation for canonical governors:

"Yes, I think, part of [the] formation [that] people need to be taken through, in an adult education way, [is] the notion of baptismal commitment to mission ... I do think they need some formation in sacramental theology particularly around the sacrament of baptism." (Interviewee D)

The interviewee described something of what such an approach might entail:

"What is it exactly? Without driving them silly, I think it should be done through practical example and illustration. That is part of the formation bag I think." (Interviewee D)

Interviewee L spelt out some understandings that might flow from engagement with people on their own spiritual journey as they prepare for a role in canonical governance:

"It is still an area that needs exploration and some of the main points of people coming to a certain trust of their own spirituality, that God has indeed called you as you are, and to grow further as you are. But as you are as a married person, as a family member, as a single person, as a member of the community in which you live, the town. That is the stuff of the life of a person." (Interviewee L)

The interviewee had had experience of dealing with university level students and saw some of the educational elements which provided growth and nourishment:

"We had a formation program for the lay students involved in pastoral ministry and what I would say was significant was the gradual growth in their sense of themselves as spiritual beings in their own right, not trying to be like the sisters, or not trying to be like the priests. And that is hard." (Interviewee L)

The interviewee was able to provide insight into some of the educational experiences which contributed to the development:

"Theological reflection is useful there [as well as] spiritual experiences of mini retreats, retreats that draw out the themes of everyday life. I think that one of the graces of this moment is some breaking down of the sacred-secular categories and a greater possibility of seeing God's action in all that is." (Interviewee L)

The interviewee reflected on the change that was being effected for lay students preparing for activity in pastoral roles:

I think that the new [thinking] invites us to think about the very world we live in. And the teachings of the Vatican Council about God's presence in all things, invites us to think that way. The fact of lay people, not people living in convents and rectories but people living in the world, the fact of that contributes to this and can lead to a greater discovery of God's presence in all things." (Interviewee L)

While the reflection stemmed from involvement with younger lay students, the principles were appropriate to formation for canonical governors and could expect to have deeper

spiritual engagement from people bringing a more mature life experience to the formation process. The interviewee's insights for development were tempered with a concern about not engaging with the opportunity which the present times seemed to offer:

> "On the other hand we could domesticate all of this and effectively put everybody in convents, intellectually, relationally. I think that is not what this moment calls for." (Interviewee L)

The engagement with adult education methods and processes became an essential element in formation for canonical governors.

6.4.2.4 Criteria for Selection of Canonical Governors

Respondents were invited to consider the criteria for selection of canonical governors. These criteria were to be mission based. As with the criteria for Formation of Governors, the explanation of "mission-based criteria" was defined by the researcher as referring "to principles of decision making drawn from Catholic Social Teaching and charisms which have underpinned the ministries and which are applied, evident and demonstrated in the ministry context".

The desirability of the trait of understanding that canonical governors' use of mission-based criteria for canonical governor selection was rated very strongly by survey respondents (Table 6.13). However, their perception that the understanding was in evidence was rated as Very High on the Likert-type scale by 14.13% of respondents and as High by 38%, giving a combined figure of 51%, just over half the figure for the equivalent items rating the desirability of this trait.

Table 6.13 Responses (%) relating to Canonical Governors' Use of Mission-based Criteria for Canonical Governor Selection ($N = 92$)

Canonical Governors use mission-based criteria in selecting future governors			
Extent of agreement on desirability		Perceived degree of awareness	
	%		*%*
Strongly Agree	**50.00**	Very High	**14.13**
Agree	**34.78**	High	**38.04**
Disagree	6.52	Fair	25.00
Strongly Disagree	1.09	Low	9.78
No answer	7.61	Unable to Judge	5.43
		No answer	7.61

Issues which were seen by interviewees as relevant to the concerns of selection are now explored.

6.4.2.5   Time Commitment for the Role of Canonical Governance

The selection of canonical governors was considered in relation to the issue of time requirements and associated restraints. Several interviewees were of the view that the time required was a major influence on who might be willing to make themselves available to be selected for roles in canonical governance.

The elements which attracted comment included the amount of time involved in the governance process itself, and the likely different background of people who might be available for the governance role in the future compared with those who currently occupy such positions. As a consequence, several interviewees noted that more time was likely to be required to meet the formation needs of canonical governors into the future. Further, such time would be in addition to that involved with the actual practice of canonical governance.

In addressing the amount of time required for involvement in governance, one interviewee said starkly:

"What you want are canonical governors who do not have fulltime jobs elsewhere." (Interviewee C)

The interviewee went on to outline the time expectations for the role in the ministry:

"We demand of our governors probably two retreats a year and a strategic planning session a year which are residential things. Plus we meet over two days. We expect them to visit between two and four site locations [each year] which are a day visit. We do not believe we should turn up at a site, walk straight into a trustee meeting and leave. We go and visit our site. We have presentations. We socialise with the facility management and then we hold our meetings. So, it is not a token visit." (Interviewee C)

This description of the requirements of trustees, who are also the canonical governors, indicates that the appointment requires substantial time commitment. The interviewee reflected on what the expectation or demand might be:

"I suspect that if you added up the time that our trustees spend, it is probably 30 or 40 days a year in the role." (Interviewee C)

In the light of such evidence, the interviewee returned to the claim that a full time employee could not be selected for the role:

"A fulltime employee cannot do that." (Interviewee C)

The comment by this interviewee reflected a general concern about the nature and extent of time required for effective performance in the role, especially by people who were holding down full time jobs. In the light of the significance of this issue, the researcher sought data from other ministries regarding time expectations of canonical governors. One said 15 days a year. Another said 18 days for most governors and 70 days for the Chair. A third said 60 days minimum a year (including meetings taking two days, preparation, annual pastoral visits to all facilities, meetings with Bishops, conferences and private meetings).

This issue of the requirements of time commitment for formation for canonical governance as well as time requirements to act in the role of canonical governor is a pragmatic pastoral matter for those being invited to the role. The range of time expectations given by respondents in existing Public Juridic Persons suggested that the time requirements and expectations need to be thought through very fully by those seeking to set up Public Juridic Persons.

6.4.2.6 Generational Change in Background of Canonical Governors

Another issue relating to selection of canonical governors was that many currently involved in canonical governance are, or have been, members of Religious Institutes and have some background in the ministry, governance and the charism. Many of the lay people currently in canonical governance roles have been mentored by those with a substantial formation background.

The next generation of canonical governors will be selected from interested people who will not have had some level of mentoring support from Religious Institutes and will be dependent on the "second generation" governors. Abeles (2008, p. 32) explained the concern:

> In some ways, however, we have placed our ministry at risk because we have not been as careful with their formation as were women religious with second generation leaders. In sum, because we may not have been as intentional with their formation, these leaders may not fully understand the theology that underlies this ministry of the Catholic Church, and how to enact it in the full context of all they do.

Interviewees reflected on the loss of the interaction of canonical governors with the Religious Institute members at board and operational level with the hope of retaining their contribution at the canonical governance level for an extended time:

> "We will be going into the next few years where there are likely to be no Religious on our board. I think there will probably be religious as long as we have them amongst our governors if we can get them." (Interviewee E)

This interviewee was involved with a Public Juridic Person which had works in several ministries – health, welfare and education. The view was shared by Interviewee C who was engaged in governance in the health ministry:

> "I think that is one of the biggest challenges that we will face. In the next five or ten years I suspect we will see the total removal of religious from these organisations, not only within the organisation but at governance level."

The interviewee reflected on the various Religious Institutes' projections of people available and capable of being canonical governors:

> "The various congregations that have traditionally run Catholic health will not be able to continue to effectively sponsor or oversee their historical ministries in [say] ten years' time. I mean genuinely whether they will have people capable of doing it or willing to do it." (Interviewee C)

The interviewee expressed concern about the future and the importance of appropriate governance (canonical and civil) of the ministry of health for the mission of the Church:

> "It is a very, very significant enterprise worldwide [in the Church]. It needs to be governed at the highest standards of governance and I think the religious will not be in a position to do that en masse the way they have done it in the past. There will be individuals who will be capable, but not en masse." (Interviewee C)

This research was premised on this understanding and the need to seize the opportunity afforded by these changing circumstances in the Church to identify the formation needs of current and future canonical governors to ensure the continuation of the mission.

Interviewee C noted the importance of appropriate formation for effective governance in preparing people who would be available for selection:

> "Therefore, if it is going to be governed effectively and in a way that it deserves to be, you have to create a whole range of canonical governors out of the laity. And I think they need significant formation." (Interviewee C)

The interviewee was hopeful that there were a sufficient number of people able and willing to undertake canonical governance roles, particularly in the health ministry:

> "I think one of the challenges is that there are a whole lot of people working within the sector that I think will, for a whole range of reasons, make perfectly wonderful future [canonical] governors." (Interviewee C)

Along with the need to recognise the consequences of generational change, the interviewee also spoke strongly on the rationale for having people with appropriate background knowledge in the sector:

> "I think there is clear advantage in having people with high level experience in the sector. It is quite risky getting a group of canonical governors that do not understand the sector. It is big business and unless you understand that, unless you understand it is a very difficult sector, it is very easy to make mistakes in it. And history is littered with people who thought they knew how to run hospitals and did not. And [they] created disasters." (Interviewee C)

6.4.2.7 Sourcing Canonical Governors

Several difficulties were identified in attracting and selecting individuals for governance roles. The first is the expectation that it was an honorary role. The second is that the role required people with energy:

> "We need to develop processes whereby we can give outstanding leaders within the organisation cross fertilisation. But you can't take someone say, who is the chief executive of [a ministry], and say at age 50, 'how about stepping down to be a canonical governor? Oh, but we do not actually pay you.' But the difficulty is you should not wait until they retire because at that stage they are older, tired and probably not at their prime." (Interviewee C)

The interviewee suggested that the task of seeking and selecting canonical governors from the executive ranks requires reconsideration of the concept of career path and associated remuneration:

> "You need to have a career path by which these people can reach the top of management and move beyond but still have the capacity to earn, because these people will need that." (Interviewee C)

6.4.2.8 Understanding Responsibility of Bishop for Coordination of Ministries

The role of the Bishop in coordinating ministerial services in the diocese was canvassed in the survey.

The desirability of the trait of understanding the canonical governors' understanding of the responsibilities of the local Bishop and ministries was rated very strongly by survey respondents (Table 6.14). However, their perception that the understanding was in evidence

was rated as Very High on the Likert-type scale by 14.13% of respondents and as High by 33.77%, giving a combined figure of 48%, just over half the figure for the equivalent items rating the desirability of this trait.

Table 6.14 Responses (%) relating to Canonical Governors' Understanding of Responsibilities of Local Bishop and Ministries (*N* = 92)

Canonical Governors understand the responsibilities of the local Bishop for the coordination of ministerial services in the diocese			
Extent of agreement on desirability		Perceived degree of awareness	
	%		*%*
Strongly Agree	**55.43**	Very High	**14.13**
Agree	**36.96**	High	**33.77**
Disagree	5.43	Fair	35.06
Strongly Disagree	0.00	Low	15.58
No answer	2.17	Unable to Judge	1.30
		No answer	2.60

Interviewees reflected on the relationships between the Bishops and the canonical governors of the ministries. These reflections related to the Bishop's responsibility for ministerial coordination and, in some cases, ecclesial creation of Public Juridic Persons; governors' understanding of these coordination responsibilities; and causes of tension between Bishops and canonical governors.

Several interviewees explained the authority of the Bishops in direct terms, for example:

"We were established by [an] ecclesiastical Province of the Bishops. They have certain rights and authorities. We have to report to them. They have the right of suppression [of the entity for failure to fulfil the approved mission]. They have the right of certain controls over the constitution. So the canonical provisions of the constitution cannot be changed without their authority and there is accountability back to the establishing authority." (Interviewee C)

Another spoke of the relationship of the Public Juridic Person to the Bishop and the Church in the following terms:

"For us, we continually refer to the fact that we are at a particular place within the Church. So [to be] within the Church is important to us. Discussions with Bishops, interaction at high levels are important and different Bishops continue a communication flow and that is giving us feedback." (Interviewee I)

Some interviewees were aware of canonical governors who did not realise the role of the Bishop in coordinating ministries. Sample quotes included:

"You hear some people say well why do we need to go and talk to the Bishop? They do not understand that we are in this diocese and we serve in this diocese and the Bishop oversees of the ministries of this diocese." (Interviewee Z)

One interviewee, in reflecting on the response to the survey item regarding the understanding of the Bishop's roles, saw it as an important matter to be addressed in formation:

"Canonical governors usually do not understand [the responsibilities] that is for sure. But they learn quickly. It is important we have it there as a desired trait and how high it is in actuality, but that is not a difficult thing to do in formation. They [the Bishops] may not agree." (Interviewee J)

Several interviewees also reflected the difficulties that Bishops faced at this time with the emergence of the new governance models associated with the newer Public Juridic Persons. One spoke, not only of the importance of the Bishop, but the work that had been done to identify several different roles that a Bishop might be involved with in the particular Public Juridic Person itself:

"Our Bishops have up to four different roles in our organisation and we have identified each role. They can be a member. They can be part of the establishing authority. They can be a combination of those, or they can simply be the chief pastor in the area in which we operate. There are canonical responsibilities in each of those roles and they have to be very aware of which hat they are wearing when they undertake any action." (Interviewee C)

Some of those authorities and responsibilities were outlined by the interviewee:

"Bishops have certain authorities in terms of the coordination of the services – the appointment of chaplains and oversight of the pastoral services and those things that we have accountability back to them as chief pastor." (Interviewee C)

One of the difficulties for Bishops was seen as the capacity or lack of capacity to grasp the complexity of the ministries which were being coordinated. One interviewee outlined the elements which the leadership of the ministry was dealing with:

"There is the aged care industry, the health industry, employment industry, the child protection industry. But it is beyond [the Bishops]. Sorry, it is beyond them. How can they possibly be aware? I cannot be aware, even as chair, of all of the industry

coordination requirements and my experience is there is a huge lot of trust and I value that trust enormously." (Interviewee E)

The interviewee spoke of a particular experience with a Bishop regarding the closure of a part of the ministry:

"I had not said to him that we are doing it. I had said that we are likely to do it. But his comment was that I should have consulted him. And I said 'I am sorry, but I cannot consult you about the survival of this organisation. I can consult you about the fact that it is going to be necessary. Is there anything else we can possibly do to save it?' But [not] if it means this organisation going bankrupt or going belly up." (Interviewee E)

In the light of the experience, the interviewee reflected further on the coordination responsibilities of the Bishop and the operational needs of the Public Juridic Person with regard to understanding when the Bishop needed to be consulted as an aspect of the Bishop's responsibility for coordination of the ministries in the diocese. The interviewee affirmed that, in their interviewee's understanding, this had been an appropriate issue to be in contact with the Bishop:

"So when you ask that question about coordination, yes, I think there is an understanding about the big, the very high level of that." (Interviewee E)

Involvement with Bishops is a significant part of the thinking of the canonical governors, and varied in line with the context and the individual bishops, involved as this quotation demonstrates:

"Our experience has been that it varies with the Bishops. It varies with their capacity, and it varies with what they have on their plate. It varies with the complexity of what we are doing. It varies with what one hears about the sort of person they are and how much they may want to get involved in operational matters. This is a real messy one for me." (Interviewee E)

One interviewee gave the reminder that tension between Church hierarchy, as represented by the Bishops, and older Public Juridic Persons, namely the Religious Institutes, has a long history:

"The women religious in particular have often done work in spite of a Bishop, and they have done great work – sometimes supported by the local Bishop, but not always ... So there are deep roots for some tension to some extent that continues today and in some ways is getting worse but in different ways." (Interviewee T)

While recognising the tension, several interviewees highlighted the need for Bishops and canonical governors of the Public Juridic Persons to work together in ways that mutually recognise and support each other's roles:

> "I do not think the Bishops can afford to be disinterested or not very interested in the growth of these organisations. Equally I do not believe that the PJPs can afford almost consciously to develop structures that negate the role of the Bishops." (Interviewee A)

> "Okay there are some of the Bishops who have issues with PJPs, so keeping the relationship with the big Church is kind of important." (Interviewee I)

Interviewee I explained the bases that needed to be understood by canonical governors and those who were appointing them:

> "There are certain fundamentals; we are part of the Church and we may not agree necessarily with all the decisions. But there are some fundamental things, and if you are not signed up to that [then] your organisation must drift somewhere." (Interviewee I)

There was further concern that some of the Public Juridic Persons (sponsored ministries) were not taking their relationship with the Bishops with sufficient seriousness:

> "There is ... a disconnect or tension between the sponsored ministries and the larger Church, usually expressed in the relationship of their local Bishop." (Interviewee T)

> "Co-ordination of ministerial services is distinctly and qualitatively different from some experiences. You know the guy in charge has got to know what is going on. That is not a problem. Communication is not a problem. Governance is a problem." (Interviewee P)

While the interviewees spoke of the tensions around relationships with Bishops, there was respect for the role of the Bishop in coordinating the ministries of the diocese, concern for the vast responsibility of the Bishop and awareness that the new canonical oversight of the ministries required a different understanding of governance by all parties. This research indicated that this is seen as a significant aspect of formation for canonical governors, including Bishops.

6.5   Chapter Summary

This chapter has reported on the analyses of the Intellectual and Pastoral Dimensions. This has been done using the reflections of interviewees of the data from the survey. A selection of the data was made available to interviewees.

Section 6.2 reported on the Intellectual Dimension, leading into the rationale for exploring the dimension through the lens of the Catholic Intellectual Tradition in Section 6.3. Section 6.4 reported on the data concerning the Pastoral Dimension, exploring it through the factor analysis lenses of Understanding Responsibility for Catholic Identity and Process Issues in Formation for Canonical Governance.

The interviewees, through their responses, supported the research questions and helped confirm the complexities of the area of canonical governance in the Intellectual and Pastoral Dimensions.

Chapter 7 – Discussion of Findings

7.1 Introduction

The study was designed to examine the needs for formation for people undertaking the role of canonical governor of ministries in the Catholic Church for the fulfilment of the mission of the Church. It further sought to establish a possible framework for such formation. The study tested the relevance of the dimensions for formation already in use in the Church in other spheres of formation. In this chapter, the findings and answers to the research questions 1 and 2 are examined by taking into account the themes that were highlighted in the review of literature.

7.2 Identification of Needs and Desired Traits of Canonical Governors

Key documents selected from the literature for the basis of the study were the Church documents *Pastores Dabo Vobis* (Pope John Paul II, 1992) and *Co-workers in the Vineyard of the Lord* (United States Conference of Catholic Bishops, 2005). These documents used the same dimensions in referring to formation, namely human, spiritual, intellectual and pastoral. The content in the dimensions was similar. This gave the study an existing creditable framework to work from, and provided the opportunity to investigate its appropriateness to an area of formation for canonical governance especially focussed on the increasing involvement of laity.

A survey was developed from items drawn from the two documents. The items were classified under one of four dimensions: human, spiritual, intellectual, pastoral. Survey respondents were invited to indicate their support or otherwise for the desirability of the traits identified for the role of canonical governor and whether they saw evidence of the traits in action. Statistical analysis of the results indicated a high level of support for the nominated traits, but a lower level of perception that the traits were being evidenced in current practice.

These results provided support for the first research question – "What are the needs in forming individuals for leadership for canonical governance in Public Juridic Persons?". The disparity between the desired and perceived traits of those in canonical governance roles was evident across each of the four dimensions and such differences provided an indication of the type and level of need for formation.

The results also indicated support for the second research question – "What is an appropriate framework for formation for leadership for canonical governance on the basis of these identified needs?". The development and application of the four dimensions of

formation (based on previous Church documents) proved to be a worthwhile platform to consider the identification of formation needs.

The survey results were further tested for validity through interviews with 17 people with expertise in canonical governance. These interviewees provided further insights and comments about the findings and value of the study. The reflections of the interviewees, from Australia and North America, helped shape the conclusions of the study.

The survey responses provided some challenging insights for formation needs for canonical governors. The reflections of interviewees raised some deeper issues that needed attention in any formation program. These issues usually arose from different interpretations of significant words (and the concepts to which they refer) that are integral to the responsibilities of canonical governors.

The proposed desirable traits for canonical governors were supported by survey respondents and interviewees. Further, the factor analysis of the survey responses indicated that canonical governors should be expected to have the particular personal characteristics and areas of competency. For example, those in canonical governance roles should:

i.   be humanly mature and aware of their gifts (from the Human Dimension);

ii. have a sense of call or vocation to the role and an involvement with the transcendent, spiritual aspects of life (from the Spiritual Dimension);

iii. engage with the Catholic Intellectual Tradition (from the Intellectual Dimension). This means that canonical governors understand that the Church has developed a coherent intellectual tradition that underpins the values and actions, and that the canonical governors are aware of and literate in that tradition;

iv. understand their responsibility for the Catholic identity of the ministry (from the Pastoral Dimension); and

v.   have appropriate formation in these matters (i-iv) to prepare them for the role (from the Pastoral Dimension).

7.3   Understanding Church Concepts and Language: Catholic Identity and Formation

An important element of formation of canonical governors is understanding Church concepts and language. Two significant concepts were highlighted in this study: Catholic identity and Formation.

The literature explored in Section 2.4 indicated that there are several models of Church (Dulles, 1987), several types of theology (Bevans & Schroeder, 2004; Ormerod, 1997) and several conceptual frameworks for theology (Bevans, 2002). They are ancient traditions and are legitimate. However, the Catholic identity which flows from each will emphasise different aspects of the mystery of God in the world, and a follower of one tradition who had no understanding of the others – and was closed off from learning about or dialoguing with those others (Bevans & Schroeder, 2011) – was likely to question or even ignore the validity of the Catholic identity of the other. Anthropologist Arbuckle (1993, 2000, 2001, 2007a, 2010) has written extensively on the cultural implications, particularly in dealing with postmodernism, that relate to this issue. He was supported by theologians (Muldoon, 2009; Ormerod, 2008; Putney, 2008), educators and missiologists (Bevans & Schroeder, 2011; D'Orsa & D'Orsa, 2010; Gallin, 2000) and canonists (Beal, 2006; Morrisey, 1999, 2001a, 2003, 2011). Findings from this study indicated that a lack of awareness of the different legitimate intellectual traditions can have serious implications for the pastoral formation of a canonical governor who has not engaged with the Catholic Intellectual Tradition as part of their formation.

Cleary's insight (2007, p. 263) with respect to the need to understand and articulate from the tradition to understand the ministry was that canonical governors:

> will require the intellectual capacity to integrate the theological and philosophical perspectives of the Church with the history and tradition of the sponsoring group while holding in balance the needs of a civil corporation that provides human services in an increasingly complex environment

The documents *Pastores Dabo* Vobis and *Co-workers in the Vineyard of the Lord* provided a scaffold to describe the dimensions of formation. These dimensions were recognised as valuable and comprehensive by the interviewees. However the survey results and interviewee responses indicated that respondents had a range of understanding about the concepts and the language associated with formation and Catholic identity. This highlighted significant areas of need for formation.

One explanation for this range of understandings, provided by a number of interviewees, was the failure of Church leaders, themselves struggling with the implications of what was being asked by the Bishops of Vatican II, to educate their congregations in what had been decreed without much preparation (Arbuckle, 1993; Confoy, 2008; Gallagher, 2003; Schweickert, 2002). The Vatican Council documents came out over a period of two years proclaiming a different way of seeing the Church while all formation programs and Church practices were still operating in the model of Church that was being downplayed by the

Council. The changes that have occurred in the Church and the world (as outlined in Section 2.2.2) indicate that the further education of more lay people is now necessary to understand the differences in the approach that lay people bring. Cleary (2007) spoke of the 'multiple world views' which lay people brought compared with the specialised view of clerics and religious of the past. This formation is necessary to allow lay people undertake their responsibilities for discerning the signs of the times and proclaim the good news in whatever domain they find themselves.

For the purposes of the study, it became necessary to create a definition of formation as the researcher found that, in the literature, the term was usually referred to in light of the expected outcomes of the formation rather than a definition of what it was. This definition was tested with interviewees for its reasonableness.

Church documents, including The Code of Canon Law, *Pastores Dabo Vobis* and *Co-workers in the Vineyard of the Lord*, appear to assume that readers have or share an understanding of the meaning of the term 'formation'. Such documents referred to formation in terms of needs, expectations or outcomes but did not offer a definition. Interviewees suggested that this did not help those who had not been accustomed to Church language and concepts, especially those terms that have been used heavily in formation for clergy and religious.

The definition, developed by the researcher from existing literature and experience, and tested with interviewees for 'reasonableness', was based on the premise that formation is for a purpose. In this study, formation was defined as:

> *a reflected development on one's gifts and how the gifts contribute to the need in hand providing an holistic preparation of a person for a role – human, spiritual, intellectual, pastoral – including reflection on the experiences of their own life which might highlight some lacks in development or knowledge that are essential for that need.*

The interviewees supported this definition, some with the proviso that the person needed (in addition) specific skills and understanding of the ministry in which they were involved.

While the purpose of the study related to formation for canonical governance in Public Juridic Persons, the definition could fit formation for a range of roles outside the scope of this study. For example, it could be relevant for board membership, senior managers of Catholic agencies, school principals and university roles. For instance, it could be used as a basis for

considering the question: "how is one formed to become a professor, or a member of the Senate in a Catholic university, to ensure that the mission of the Church is being fulfilled?"

7.4 Dimensions of Formation Needs: Addressing Research Question 1

What are the needs in forming individuals for canonical governance in Public Juridic Persons?

7.4.1 Human Dimension

The Human Dimension of formation for canonical governance related to the need for people to be mature and self-aware human beings with the capacity to discern the needs of the mission in complex issues.

The issue of language was significant in the Human Dimension as key factors included terms such as justice, compassion and respect. In the study, it became clear that the terms had a contextual element or had not had shared meaning among people who were using the terms. Yet these are essential concepts which canonical governors are required to grapple with in their role. Doing so requires deep human maturity and self-awareness.

Human maturity was seen as significant because the items in the survey which were strongly supported as desired in the responses had dealt with the three values of justice, compassion and respect for persons. However, the responses on perception that these values were currently evident were low. Interviewees supported the three values and grappled with the differences between the desired and perceived. The assessment made in the study was that the three values are seen as significant, but in the world of finite resources and allocations, the exercise of them is in tension. Hence, a decision may seem 'unjust' or 'uncaring' in its outcomes. Thus it can appear that the values maybe being ignored when in fact they may not. Interviewees who were canonical governors were able to articulate the difficulties involved in decision making in keeping with the values with limited resources. The continued capacity to engage in this process requires of canonical governors a deep level of human maturity (Hester, 2000; Talone, 2004, 2005).

Interviewees supported the need for self-awareness as a basis for both human maturity and the capacity for insight into the spiritual dimension of life.

7.4.2 Spiritual Dimension

The Spiritual Dimension of formation for canonical governance related to the need for people to engage with the transcendent (McBrien, 1994) as well as the immanent. This means to recognise that the mission of caring in all its human forms draws its meaning from the belief

in a creator God who intended good for the world. Brueggemann (2007) reflected on this engagement with a personal deity as both transcendent and immanent in the text of Deuteronomy 10: 17-18:

> For the Lord your God, is the God of gods and the Lord of lords, the great God, mighty and awesome, who has no favorites and accepts no bribes; who executes justice for the orphan and the widow, and who befriends the alien, feeding and clothing him.

He described its implications as expressing "God's grand sovereignty and God's compassionate neighborliness" (p. 56). Canonical governors are on this spiritual journey requiring their involvement in faith and action, or faith and good works as described by the Letter of James (2: 14 – 17):

> What good is it, my brothers, if someone says he has faith but does not have works? Can that faith save him? If a brother or a sister has nothing to wear and has no food for the day and one of you says to them "Go in peace, keep warm, and eat well" but you do not give them the necessities of the body, what good is it? So also faith of itself, if it does not have works, is dead.

In the Catholic Church, this involvement in the spiritual journey and action has been expressed in the long tradition of Social Teaching (CHAUSA, 2007b; Conway, 2003; Cornish, 1993; McClellan & Dominguez, 2006) linking God and the neighbour.

The aspects of the Spiritual Dimension which were highlighted in this study for formation were that:

i. Those engaged in canonical governance need to recognise the sense of call to the role based as an understanding of the baptismal call (Fox, 2003; Hagstrom, 2003; Hahnenberg, 2003; Leckey, 2009; O'Meara, 1999; Wood, 2003)

ii. there exists a sense of vocation to the role of canonical governor as a ministry (Fox, 2005b; Fox & Bechtle, 2005; Lakeland, 2009; Stanek, 2008; Winschel, 2008)

iii. engagement with the Word of God is necessary

iv. The next generation of canonical governors are imbued with a lay spirituality.

In the following sections, the implications for formation from the literature and research analysis are examined in the light of these findings, particularly lay spirituality, baptismal call, vocation and formation for engagement with the Word of God. The issue of involvement

of people from other faith traditions in canonical governance in the Catholic Church is also reflected upon.

7.4.2.1 Lay Spirituality

One aspect of the spiritual dimension of formation is the changing nature and significance of lay spirituality. The term, lay spirituality, expresses the spirituality of those who live their lives "primarily as a secular vocation [which means that] they live out their salvation in the context of the *saeculum* [the secular world], the time created by God within which they are called to build his kingdom… this will occur among the many competing commitments of home, work, and family" (Muldoon, 2009, p. 15). This is in contrast to the spirituality of clerics and religious whose way of life was focussed on prayer life from which ministry flowed (Wittberg, 2006). Lay spirituality brings "other world views and experience" (Cleary, 2007, p. 240).

The rise and articulation of lay spirituality has been occurring in the Church since Vatican Council II. This study outlined some of the causes of the change. These included the Council's proclamation of the baptismal responsibility of all Christians, as well as the fall in the number of priests and religious. These causes have resulted in positions and roles in the Church which had been taken for granted as belonging to clergy or religious, now being increasingly filled by lay people. This has been particularly evident in senior management ministry roles (Cleary, 2007). It is now evident in the governance of Church ministries. This trend raised at least two important issues. First, the limited understanding of what is entailed for formation for lay leaders for such governance; and second, what are the implications for the nature of this governance by people who bring a lay spiritual perspective. In *Co-workers in the Vineyard of the Lord,* the US Bishops set out to provide a framework for formation for lay ecclesial ministers who work in Church roles for the mission of the Church. That framework was directed at roles in the parish and diocese. The expectation in the mind of the laity was that the formation would be the preparation for the exercise of actual authority in the various roles. The literature suggested that this has not yet occurred, and still needs to happen (Fox, 2010b; Hahnenberg, 2009, 2010; Morrisey, 2011; Muldoon, 2009).

From the interviewees' viewpoints of the survey responses, it appeared that while people have been formed for ecclesial roles in parish or diocese, they have not been given canonical authority at appropriate levels in parish or diocese; whereas, in Public Juridic Persons, canonical authority has been conferred without (in some cases) necessary formation.

7.4.2.2   Baptismal Call

As stated in Section 2.7.2.3, the baptismal call is a general call to all Christians (Abbott, 1966b n 3) to be engaged in the bringing about of the kingdom of God in the world. Interviewees indicated that the Vatican Council call for responsibility for all Christians to be involved in the spreading of the good news of the kingdom of God (highlighted in the literature) had not been appropriately part of the education in faith for the laity in the decades following the Council. Interviewees viewed such education as the basis for formation for governance roles. The past decade has seen greater exposure of the topic of baptismal call in the literature (Dunn, 1995; Leckey, 2006, 2009; Morrisey, 2007b, 2011; O'Meara, 1999; Ranson, 2010; Schuth, 1999; Wood, 2003) and efforts to promote the understanding of the baptismal responsibility.

A further area for development in formation for canonical governors is an understanding of the relationship between the baptismal call and 'the mission'. In this study, mission referred to the "proclaiming, serving, and witnessing to God's reign of love, salvation, and justice" (Schroeder, 2008, p. 3). The relationship between baptism and mission is important, because baptism is the entry into the mystery of Church and, the pilgrim Church, as expressed in *Gaudium et Spes (2)*, 'is missionary by its very nature' (Abbott, 1966d).

Survey results and interviewees strongly supported the link between baptismal call and mission. However, interviewees were not surprised at the low survey scores for perception as they believed that the language is not in common use among lay people. Lay people may, in fact, be living their lives doing good works because of their faith, but not express it in the language of 'baptism for mission'. The implication for formation is that canonical governors need a level of comfort with the language in linking it to their lived experience. They also need to understand that spiritual development is a life journey that may lead them to understand aspects of life differently. As theological reflectors explain it:

> Our capacity to comprehend and live faithfully as Christians exists in direct proportion to our capacity to notice, describe, and discover the revelatory quality of our human experiences. Our capacity to live rich, authentic human lives depends on our capacity to befriend and enter deeply and openly into our Christian heritage. Tapping the inherently dynamic and energy-filled connection between our lives and the Christian heritage is crucial to the survival of our world, our planet and our church (O'Connell Killen & De Beer, 1994, p. ix)

This is an expected journey from spiritual formation and canonical governors need to be open to that journey and what the journey may further call them to.

7.4.2.3   Spiritual Formation and the Word of God

Spirituality means to live with a belief that there is more to life than is physically observable, and that there is a reality beyond human that is regarded as transcendent as described in Section 2.7.2.1 and 2.7.2.2. Christian spirituality is firstly informed by the Jewish and Christian Scriptures as described in Section 2.7.3.2. This is often termed "the Word of God". The other source is the Christian Tradition which is the teaching of the Church from the long, reflected living experience of the Church and its members, tested against the Scriptures (G. Kelly, 1998). Hence spiritual formation for canonical governors entails an understanding not only of an awareness of the Scriptures, but an engagement with the meaning of the texts and implications for their own lives and the spiritual shaping of the ministries in which they are involved.

The survey responses indicated strong support for this engagement with the Word of God as a desirable trait. However, it was not perceived to be occurring in practice. Interviewees also supported the desirability of engagement with the Word of God by canonical governors. A number of interviewees thought that the low perception rate might be attributed to tentativeness among leaders of Religious Institutes to provide leadership in formation and deeper engagement with the Word of God for people they were encouraging to take up the role of canonical governor. A reason for such tentativeness found by Cleary (2007, pp. 163-166), when researching senior Catholic management of ministries, was that the members of the Religious Institutes previously running the ministries had rarely articulated the mission and belief system because the mission and belief system had never previously been formulated, and nor had the scriptural sources. Other interviewees also linked the lack of involvement with the Word of God with the general lack of engagement with the recommendations of Vatican II for Catholics to seek a fuller spiritual life through the Scriptures.

The implication for formation for canonical governors is that they need an understanding of the place of the Word of God as a fundamental aspect in their personal development and in canonical decision making.

7.4.2.4   Vocation to the Role

The study explored involvement in canonical governance as a vocation to which a person is called. This topic has been widely explored in the literature for ecclesial workers (Fox, 2005a, 2005b, 2010b; Gaillardetz, 2010; Lakeland, 2009; McCord, 2010; United States Conference of Catholic Bishops, 2005; Winschel, 2008). The survey and interview responses for this

study supported the view that the concept of vocation was significant for canonical governors and stressed the point that the term 'vocation' needed recovering from the narrow use of the past which confined it to vocation to priesthood or religious life (Casey, 2010; Fox, 2005b; Talone, 2009). Rather, 'vocation' should be understood as "the work God calls one to" (Fox, 2005b, p. 13; see also Hahnenberg, 2003, p. 134).

Such a view helps reclaim the broader understanding of vocation and the realistic involvement of lay people being formed for the ministry of canonical governance as a calling in the Church.

7.4.2.5   'Baptismal Call or Catholic Responsibility?'

An area of debate from the study was whether canonical governors needed to be members of the Catholic Church (Catholic Health Australia, 2011; Sweeney, 2011). Several interviewees expressed concern at the idea that it was possible for non-Catholics to take canonical responsibility for a Church ministry. The issue came up as interviewees considered the survey item regarding the need for canonical governors to be responding to a baptismal call, in the light of their awareness of the current practice in some countries of appointing non Catholics as canonical governors. The study found that some interviewees as well as authors (Sweeney, 2011) could not see how it could be possible, others were concerned that it was occurring or even being considered. On the other hand, one interviewee was strongly supportive of the concept of members of other faith traditions holding canonical responsibility. This research identified a range of positions with regard to this issue. The outcome of this debate concerning any requirement for canonical governors to be Catholic has implications for the formation framework proposed in this study. A commitment to, understanding of, and engagement with the ecclesiology and mission of the Catholic Church are important features of such a framework – and how members of other faith traditions may exhibit their understanding of such features is an area for further research.

7.4.3   Intellectual Dimension

The Intellectual Dimension of formation for canonical governance related to the need for people to engage with the Catholic Intellectual Tradition and have a basic understanding of the language used (Bouchard, 2009). Several interviewees were concerned that the Intellectual Dimension had the lowest desired scores in the survey. Several also made comparisons with people being equipped with specialist knowledge to be considered to be a

doctor or senior administrator, and were concerned that it was possible to undertake canonical responsibility without related adequate knowledge.

Specialist knowledge in the Intellectual Dimension requires an understanding of theology. Theology has a particular set of terms which have their particular meaning. It also has several disciplines. Two particular disciplines relevant for this study are ecclesiology and missiology.

Another relevant intellectual area for canonical governors is an understanding of Canon Law and its relationship to theology. Further, the Catholic Intellectual Tradition has helped create Catholic social teaching which informs the social engagement as it is expressed in the ministries. These areas are reported on in the following sections.

7.4.3.1 Theological Literacy for Canonical Governance

The study examined formation needs for canonical governors of Public Juridic Persons in the Church. The view formed from the literature was that the core issues for the governance responsibilities are essentially theological issues (Arbuckle, 2007a, 2010; Austin, 2011; Beal, 2006; Bevans, 2009; Bouchard, 2008; Casey, 2000; CHAUSA, 2005b; Fox, 2008; Gottemoeller, 2007; Grant, 2001c; Grant & Kopish, 2001; McArdle, 2010; Place, 2004; Yanofchick, 2007a)

Theology is the study of the relationship of a person and communities with God and the engagement of the lived experience with the Word of God (McBrien, 1994). An aspect of 'knowing theology' is to understand the meaning of frequently used terms of an ecclesial nature. The process for this may need some formal imparting of relevant knowledge for those being considered for the role for canonical governor (Maltby, 2007).

The survey responses indicated high level of support for canonical governors being basically theologically literate. The study, however, revealed that the perception was that this was not the case. Interviewees supported the trait and were concerned that the survey results showed the traits in the Intellectual Dimension scored the lowest as desired.

Ecclesiology and missiology were examined as particular disciplines of Theology in this study for their significance to the formation needs for canonical governance. These are discussed in the following sections along with Canon Law.

7.4.3.2 Understanding Ecclesiology

Ecclesiology is the study of the Church and its structure and operations (Lakeland, 2007; Lucas, 2007; Lucas et al., 2008; Nichols, 2004; Orsy, 2004; Osiek & Miller, 2005; Putney,

2004; Sowle Cahill, 2004). Given that the ministries being governed are ministries of the Church for the sake of the kingdom of God, the survey results and interview responses echoed the view in this literature of the need for canonical governors to understand what they were being asked to be responsible for, especially in relation to Church structure and operation. Interviewees were concerned at the lack of understanding that was revealed in the survey results in the area of structure and operations of the Church and ministries.

Interviewees were also concerned at the low rating given to the need for some background in ecclesiology and the much lower rating given to the perception that there was an understanding of the place of ecclesiology in canonical governance. Consequently, interviewees strongly supported the need for formation in ecclesiology.

7.4.3.3   Understanding Missiology

Missiology is the theological study of the purpose of the mission to reveal the kingdom of God (Abbott, 1966a; Bevans, 2005, 2009; Bevans & Gros, 2009; Bevans & Schroeder, 2011; N. Connolly, 2010; Schroeder, 2008). The literature on this theme is diverse. For example, the term has been associated with evangelisation of other peoples to convert them to, in this case, the Christian view of the world. In contrast, the literature cited above makes the point that mission is the activity of the Church and that it is expressed through daily activity in life and relationships in all parts of the world including parishes and ministries (Bevans, 2009; Schroeder, 2008).

Most interviewees saw that it is important for canonical governors to understand this latter meaning of Church mission as the fundamental reason for the existence of the ministry, and the good work that is done for humanity. However, the survey results indicated that fewer people regarded it as a desired component and the result for the perceived score was very low. Further, some interviewees questioned the relevance of 'some background in missiology' for canonical governors. They expressed the opinion that missiology pertained to foreign missions. A number, on further reflection, saw it in the sense of the activity of the Church in daily life and relationships.

On further reflection some interviewees concluded that a number of current canonical governors of Public Juridic Persons were committed to the mission of the ministry as described and understood in Section 2.3.4, but had little understanding of the relationship of the ministry to the mission of the Church. This finding suggests that a significant aspect of formation is to ensure that canonical governors understand the meaning and place of mission

and the relationship between ecclesiology, mission and the ministry in which they are engaged.

7.4.3.4   Understanding Canon Law

Given that the study was researching canonical governance (i.e., governance required by The Code of Canon Law), several issues emerged from the survey and the interviews about the significance and understanding of Canon Law. Morrisey (1999, 2001a, 2001b, 2002, 2003, 2006a, 2006b, 2006c, 2007a, 2007b, 2007c, 2009) is a significant writer in the literature on the interpretation of Canon Law for the establishment and operation of Public Juridic Persons. Morrisey is Professor Emeritus of Canon Law, St Paul University, Ottawa, Canada and has been involved with the preparation of Public Juridic Persons internationally. Much of his writing, whether from articles or conference papers, focuses on explaining the relevant canonical concepts regarding Public Juridic Persons to non-canonists who have found themselves having to learn about the implications of Canon Law for future changes for the governance of their ministries.

Several other canonists (Austin, 2000, 2011; Beal, 2006; Burns, 2006; Cusack, 2006; Di Pietro, 2006, Undated; Dugan, 2006; Euart, 2005; Hite, 2000; Holland, 2001, 2005; King, 2006; McDonough, 2004; P. Smith, 2006a; R. Smith, Brown, & Reynolds, 2006; Sweeney, 2001, 2005) have also been writing for similar audiences with the consistent message of explaining options for future possible governance models. The writings have been heavily focussed on possible structures with very little written about formation needs for canonical governors. This included the need for them to have adequate formation in Canon Law.

Canon Law is a supportive tool of theology and the mission (Austin, 2011). The concern of many of the interviewees was that, in the setting up of Public Juridic Persons, much emphasis had been placed on determining the canonical structure and insufficient attention paid to the development of the theological understanding of the mission of the Church and the underpinning of Canon Law for those being asked to lead the ministry. The high support for the traits of identified as desired in the survey and low expression of evidence of enactment supported this position.

In the survey results, no item had lower support for the perceived rating than the item for 'some background in Canon Law'. The study found that there was strong support for an adequate intellectual understanding of Canon Law and its relationship to the mission of the Church and the ministry in question (e.g., health, education, welfare).

Several interviewees commented with analogies about the need for canonical governors to have appropriate background in a broad range of high level competencies. Interviewees spoke of the responsibility for a medical doctor to be registered before being called a doctor and the need for a Chief Executive Officer to understand finances (even if their background was not in finance). Similarly, they argued that those with responsibility for canonical governance require 'some background' in Canon Law. Aspects of the Code of Canon Law which are relevant to canonical governors include the law on existence and governance (Book 1 of the Code), the rights of the people of God (Book 2), the mission of the Church (Book 3) and the temporal goods of the Church as they undertake the stewardship of some of those goods (Book 5). The understanding of these elements of the Code, in the intellectual tradition, would be linked with the understanding of Church and mission as set out in the Code and inform the spiritual development of governors.

Several interviewees strongly indicated that those involved in organising the creation of Public Juridic Persons found themselves required to learn what was involved in Canon Law, and further, that members of Religious Institutes had limited knowledge of how their ministries were governed. This finding is supported by Maltby (2007). While the focus of the research was initially on formation for lay canonical governors, this finding highlighted that formation for canonical governance is also required for members of Religious Institutes; in other words, all canonical governors (lay, cleric and religious) need to understand the relevant elements of Canon Law and how these guide and are evaluated in the canonical governance process.

7.4.3.5   Appreciation and Application of Catholic Social Teaching

The Catholic Intellectual Tradition has underpinned the long history of Catholic Social Teaching (Keehan, 2012) which is a pillar of the Catholic Social Tradition (Aubert & Boileau, 2003; CHAUSA, 2006b; Naughton, 2006). The Social Tradition flows from the Hebrew Old Testament writings of dreams for and failures in creating a world where the vulnerable are supported, particularly in the prophetic writings (Jer 5: 26 – 31; 1 Sam 2: 1 – 10; Amos 8: 4 – 6). The Founder of Christianity built on that tradition (Luke 4:18 – 19) and the account of the life in the early Church is of service to the widows, orphans (Acts 4:32 – 35; 6:1 – 7) and poor communities (Acts 11:27 – 30).

Findings from this study supported the premise that canonical governors need to be able to articulate why the ministry operates the way it does and for the reason that it does in the light of the Catholic Social Tradition. For example, the healthcare ministries were established to

assist the poor as an expression of the good news of God's kingdom and the mission statements of the Public Juridic Persons still contain these commitments (for example, as exemplified by St Joseph Health System (2007)). The principles of Catholic Social Teaching that relate to the findings from the surveys and interviews indicate that formation for canonical governors should include articulating the significance of the values of justice, compassion and respect for persons.

7.4.4 Pastoral Dimension

The Pastoral Dimension of formation for canonical governance relates to the need for people engage with the practical aspects of implementing the ministries in the name of the mission of the Church (Arbuckle, 2007a, 2007b; Austin, 2000; Cassidy, Sheehan, & Whelton, 2009; Catholic Health World, 2011a; Fox, 2005a, 2010a; Gottemoeller, 2007; Gray, 2005; W. Johnson, 2010; Keehan, 2009a, 2009b; McCord, 2010; Morrisey, 2003, 2007a, 2010; O'Meara, 1999; Stanek, 2008; Talone, 2004).

The Pastoral Dimension can be described as the effective outcome of formation and the elements required for formation for canonical governance require an understanding of high level concepts and skills for the leadership in governance. Otherwise there is the danger that the effective leadership of the governance responsibilities will be unfairly left with senior managers. In this study, a "high level concept" refers to that which is strategic, fiduciary and generative, and is the responsibility of the governors for the direction and continuation of the ministry (Chait et al., 2005).

The aspects of the Pastoral Dimension which were explored in the study included the need for canonical governors to understand what Catholic Identity means in the ministry. Because the ministry exists in a changing environment, canonical governors also need to be able to keep the ministry appropriately in touch with the relevant needs of the mission, and discern where the ministry might need to be directed in the light of such discernment. Further, they need to be cognisant of the responsibility of the Bishop for the coordination of ministries in his diocese, and the relationship which needs to exist between the Bishop and canonical governors. These areas are discussed in the following sections.

7.4.4.1 Understanding Catholic Identity

Canonical governors need to understand Catholic Identity and appreciate the richness of this concept both for the promotion of the ministry, and the defence of their position, if and when challenged. As noted in Section 2.4 and further developed in 7.3, one's approach to theology

influences one's understanding and articulation of Catholic Identity. Canonical governors, therefore, need to understand the validity of the particular approach they have inherited or are building, and have an awareness of and respect for alternative ways of bringing the good news of the Kingdom to the world (Arbuckle, 2007a; D'Orsa & D'Orsa, 2010; Downey, 2003; Gottemoeller, 1999; Hehir, 2008; Hickey, 2006; G. Kelly, 2007; Lucas, 2007; Martinez, 2007; Morrisey, 1999; O'Rourke, 2001). It is for the purpose of bringing to life that which St Paul spoke of regarding "different kinds of spiritual gifts, but the same Spirit; there are different forms of service but the same Lord" (I Cor 12: 4-5). Such teaching needs to be given life in formation of canonical governors.

The survey responses strongly supported the need for canonical governors to understand their responsibility for the Catholic Identity of the ministry. The score for the perception that it was occurring was among the highest. Interviewees, particularly those involved in canonical governance, spoke of the importance that was placed on Catholic identity in their deliberations as well as the difficulty of discerning the appropriate way in which to deal with various complex issues in the light of the articulation of the Catholic identity. The implication for formation is that canonical governors need to understand what is meant by Catholic Identity in the light of Scripture and Catholic Social Teaching and educational philosophy, and how these concepts imbue their ministry.

7.4.4.2   Understanding Discernment for Mission

Another high level concept was that of discerning the signs of the times for the sake of the mission of the Church. Interviewees (in Section 6.4.1.4) strongly supported the need for canonical governors to be able to understand and interpret or discern the needs of the ministry at any particular time in the light of mission of the Church.

Understanding discernment for mission required a combination of the traits that have been nominated across the dimensions. It required theological understanding and theological reflection. It required an understanding of the ministry and the human maturity to make decisions, given a range of options, in the light of the mission (Grant, 2003; K. Homan, 2004; Moore, 2007; O'Meara, 1999).

The issue of leadership of a particular ministry raised the concern for some interviewees that the canonical governors needed to have an understanding of the ministry itself, whether it was health, education, welfare or aged care, to be effective in the role. A significant change has been that, previously, with governance by members of a Religious Institute, the leaders usually came from the ministry and if the institute was involved in multiple ministries (e.g.,

health and education) there would usually be people from the range of ministries in the canonical leadership. Now people can be appointed to governance without any background in the ministry.

This study supported the premise that some understanding of the ministry was necessary for canonical governors. Cleary (2007, p. 244) expressed the need for leaders to have the ability to transmit the meaning system for which the organisation was established. She explained that while each individual contributed to the meaning with their particular gifts, some need to be able to lead in transmitting the meaning system about the mission and all need to be able to contribute to the enactment of it. Other writers describe this role as that of the 'sense makers' (Chait et al., 2005), whether that be for finance, ethics, law, theology or governance. The sense makers are relied on by others in the group. Cleary argued the need in faith based organisations for 'faith sense makers' in these critical roles.

7.4.4.3   Relationship of Canonical Governors with Bishops

Another high level concept associated with the pastoral dimension for canonical governors was an understanding of the ecclesial relationship between the Bishop on the one hand, with his pastoral responsibility for the diocese and, on the other, the canonical governors with their responsibility for internal governance of the operation of the ministries in his diocese.

The relationship of canonical governors with Bishops was a topic in the literature on formation (Austin, 2011; Cusack, 2006, 2007, 2008; Euart, 2005; Lucas, 2007; Morrisey, 2007a; Willis, 1986). Bishops also contributed to this literature (Coleridge, 2009a, 2009b, 2009c; Putney, 2004, 2005, 2007; Sklba, 2007; Skylstad, 2008; Wuerl, 1999).

The survey results indicated a perception that the role of the Bishop in responsibility for the coordination of ministries in his diocese was not well understood. Interviewees were better informed on the role of the Bishop. They were supportive of his role and stressed the need for canonical governors to have good lines of communication. Some interviewees were perturbed by particular disagreements that they were aware of. They expressed sympathetic concern for the capacity of Bishops to be able to grasp the depth and breadth of the complexities of the operation of the ministries in their dioceses. Interviewees were also aware of the need for canonical governors to understand the theological implications of issues about which a Bishop might have a concern.

The canonical governors, as a group, have a responsibility to be able to address the theological questions appropriately. Canonical governors may come with different gifts, but they need to understand the theological responsibilities.

7.4.5 Summary Comments on Research Question 1

The study sought to determine the needs for formation for canonical governors. The research found evidence through the design, conduct and analyses of surveys and interviews that a range of traits was desirable for these canonical governors. However survey respondents and interviewees considered that these traits were not strongly evident in the current time for people involved in canonical governance.

The important issues for formation which arose from the four dimensions of the framework included canonical governors':

a) human maturity to be able to deal with ministry demands with justice and compassion,

b) ability to engage in the spiritual life personally and for the sake of the ministry in the Church,

c) appreciation of and engagement with the Catholic Intellectual Tradition,

d) understanding of Catholic identity (i.e., that it is not a narrow concept), and implications for the mission and ministry

e) awareness of the role of, and relationship with, the Bishop.

The implications of the themes are further explored in Chapter 8.

7.5 Framework for Formation – Addressing Research Question 2

What is an appropriate framework for formation for canonical governance on the basis of these identified needs?

A framework for formation for canonical governance is seen to consist of three components:

i. Ecclesial literature foundations;

ii. Means of identifying the formation needs; and

iii. Principles underpinning the nature of traits relevant for canonical governors, the identification of the formation needs, and the use of the results of the needs analysis.

These components are further explored in the following sections.

7.5.1 Ecclesial Literature Foundations for Canonical Governance

Two related Church documents provided the basis for identifying needs in this study. These documents used common headings for the dimensions of formation upon which it was intended to base the formation. These documents were, *Pastores Dabo Vobis* (Pope John Paul II, 1992) on priestly formation and *Co-workers in the Vineyard of the Lord* (United States Conference of Catholic Bishops, 2005) on lay ecclesial formation. As examined in Section 2.7.5, the formation frameworks proposed for priesthood and lay ecclesial workers in dioceses indicated that, while the framework headings or dimensions are the same, the content and depth expected varied considerably. From a pragmatic aspect, the priestly formation is required to take six years and this is not an expectation for ecclesial workers.

These documents referred to human, spiritual, intellectual and pastoral dimensions of formation. Traits associated with each dimension formed the items for the survey.

Both documents emphasised the need for development of a personal spirituality informed by the Scriptures and a theology informed by the Church tradition. While the pastoral emphasis varied with the ministry being addressed, the framework dimensions also have a weaving that is crucial for wholeness and this has been shown to be relevant for a framework for formation for canonical governors. For example, a developing intellectual knowledge of Scripture and theology would be expected to influence the personal spirituality and faith relationship with God and Jesus. This would be expected to flow through to assist the person in shaping the response to the mission of the Kingdom of God for which the organisation exists and to which the person has been called to leadership.

The implication for formation for canonical governance was that people see and understand the weavings and relationships across the four identified dimensions (Human, Spiritual, Intellectual and Pastoral).

7.5.2 Means of Identifying Formation Needs

The formation needs for canonical governors were identified through a survey containing items relating to areas of the four dimensions of formation initially proposed on the basis of the two foundational Church documents. The survey results were factor analysed to validate and identify emergent themes relating to each dimension. In Table 7.1 the themes are listed by each of the dimensions and the relevant traits which emerged from the survey are linked to the relevant theme.

Table 7.1   Themes Identified from Factor Analysis of Canonical Governance Traits

Human Dimension	
Factor Analysis	**Relevant Traits from Survey Items**
Human Maturity	People of Integrity Balance in Judgement Deep Sense of Justice Genuinely Compassionate Concern for Others Personal Maturity Demonstrate Self-knowledge Respect Every Person
Self-awareness	Balance in Behaviour Learn from Criticism Aware of their Gifts Learn from Praise
Spiritual Dimension	
Factor Analysis	**Relevant Traits from Survey Items**
Sense of Call to the Role	Understand Baptismal Call Sense of Vocation See Ministry of Governance
Call to Spirituality	Committed to Mission of Church Identification with Ecclesial Community Practices of Prayer and Spirituality Open to Transcendent United to Word of God Growth in Love Bridge for People to Christ
Intellectual Dimension	
Factor Analysis	**Relevant Traits from Survey Items**
Catholic Intellectual Tradition	Faith Rooted in God's Revelation Faith Embodied in Living Tradition Journey to Theological Reflection Some Background in Missiology Some Background in Ecclesiology Some Background in Canon Law Articulate Missiology for Ministry Understand needs in Light of Scripture and Tradition Knowledge of Catholic Social Teaching Catechism of Catholic Church Appreciation of Faith through Intellectual Formation
Pastoral Dimension	
Factor Analysis	**Relevant Traits from Survey Items**
Catholic Identity and Mission	Understand the Ministry Understand Responsibility for Catholic Identity Discern Signs of Times for Mission Understand Responsibilities of Bishop for Coordination Responsibility for Spiritual Life of Ministry Inspire Common Purpose
Formation for Canonical Governance	Selecting Future Governors Forming Future Governors Understand Organisational Systems and Dynamics Call Leaders to Account Appropriately

These traits were identified in the formation framework as relevant for canonical governors. Formation programs could be designed on the basis of the needs identified (i.e., the discrepancy between the actual and desired) and evaluated in terms of how well they addressed the discrepancy between the actual and the desired traits for canonical governance.

Whether there is a need for development for a potential canonical governor will depend on the level of the candidate's assessment against the traits.

This study has demonstrated that the needs can be identified by survey and interview to determine whether these traits are present or not.

7.5.3   Summary Comments on Research Question 2

From the study, three groups of principles can be identified which are currently lacking in identifying traits and formation needs for candidates for canonical governance.

This study has identified the need for formators of canonical governors to be aware of these principles which need to be addressed and may reveal lacks:

a. There is an ecclesial literature, including the Vatican documents, which set out a range of dimensions for formation from which the traits have been developed;

b. People have difficulty coming to terms with Church language, understanding the complexity of Catholic identity, the nature of ecclesiology, the place of faith and the message of Vatican II; and

c. In using the data to inform formation programs, an adult educational model is very important, starting with the adult background that people bring.

The leaders and formators need to know and articulate the goals of the organisation. The formation for individual candidates would be implemented after identifying any lacks in the person's background. For example, one may have a strong background in health practice, but little engagement with theological underpinning; another may have a deep theological background, but limited experience in pastoral practice. Under adult learning principles, their formation for the roles will be different (J. Connolly, 2002)

An understanding of these principles is necessary when conducting a survey to assess the needs of people for formation.

In *Gaudium et Spes* (n 4), the Council had called on the Church to move to 'discern the signs of the times' (Abbott, 1966d). Such discernment requires a willingness on the part of both Church leaders and canonical governors to be open to changes in the needs of the Church and the world. The task for all leaders was to understand the dramatic changes and be able to interpret how to deal with them in the light of the mission of the Church.

7.6 Chapter Summary

This chapter has reported on the findings and answers to the research questions 1 and 2 in the light of the analysis of the research data by taking into account the themes that were highlighted in the review of literature.

The literature review led to the identification of key Church documents which were able to provide a basis for seeking data on formation needs and identified possible traits for canonical governors. These were tested through survey and interview as research methods and the relevant traits supported. Assessing canonical governance candidates in the light of these traits will identify the needs for formation for canonical governors.

This study has identified traits that constitute the basis for identifying formation needs. are able to be underpinned by a formation framework that links to existing formation frameworks currently in use in the Church.

Chapter 8 – Summary, Conclusions and Recommendations

8.1   Introduction

The purpose of this chapter is to provide a summary of, and conclusions and recommendations from the research in the light of the findings with regard to formation needs for the role of canonical governor and proposing a framework as a basis for attending to the formation needs.

The study created a definition for formation and confirmed that canonical governors need a preparation that includes some theological literacy, spiritual development, human maturity and an understanding of Catholic identity.

One interviewee, when looking at the desired traits, mused that they looked a bit like 'motherhood' statements. The concern which the research raised was that, given the disparity between the desired and perceived, what might be regarded as 'motherhood', wasn't seen to be happening.

8.2   Summary of the Research

Through the literature review, the study found in human, spiritual, intellectual and pastoral dimensions, relevant traits for formation for people in the ministry of canonical governance. These traits were cited in priestly and lay ecclesial formation documents in the framework of the identified dimensions. A selection of these traits was made into items for a survey from all four dimensions. In the survey, respondents were asked to score on a Likert-type scale whether they believed the traits to be desirable for people who were given the responsibility for canonical governance of ministries in the Church. The 92 respondents to the survey provided strong agreement on the relevance of the traits in the 43 items. This agreement provided support for the validity of research question 1 which sought to identify needs for formation for canonical governors. The traits were used to identify relevant needs.

The respondents were asked to rate both the desirability of each trait, and the extent to which they perceived that trait to be evident in current practice in canonical governance. The responses to the items revealed that the traits listed as desirable in canonical governors were believed to be relevant by the respondents and that, in general, the respondents could not report on the traits being in evidence at the current time.

The disjuncture between desired and perceived traits gave the basis for the need for formation for canonical governance.

Further, the drawing of the traits from the four dimensions already in Church formation documents, gave a framework from which the formation needs could be identified, organised and tested in formation program development and implementation. This insight provided a response for research question 2 which sought to identify an appropriate framework for canonical governance formation.

The survey responses were examined through interviews with 17 people with experience and expertise in the fields of canonical governance, spirituality, Canon Law and theology. Interviewees expressed general support for the listing of desired traits. They expressed concern at the disjuncture between the desired and perceived traits and saw an urgency in meeting the needs for formation of canonical governors, and as a consequence, for the traits to be evident in practice.

8.3   Conclusions of the Research

The study allowed several conclusions to be drawn regarding the future of canonical governance in the Church.

Firstly, the study highlighted that lay people understanding canonical governance and taking canonical responsibility for ministry is an area for development in the Church. Accepted and expected frameworks of governance of ministries in the Church (i.e., those being led by Religious Institutes) are either no longer available or have diminishing capacity to lead in certain ministries. The study described how the demise of that expected, certain world of canonical governance has come about since Vatican Council II.

Second, this study has identified certain traits for canonical governors and the means by which those traits can be assessed. However the choice and priority given to particular traits may vary from ministry to ministry and context to context. To use the findings of this study fruitfully, ministries need to consider and develop a shared understanding of their goals and mission, and therefore what is required of canonical governors. On this basis, formation programs can be designed and implemented for individual candidates, incorporating suitable adult education methodologies that take account of individuals' knowledge, skills motivations and other attributes. Traits deemed as essential for someone in the role of canonical governance provide the desired ends, or outcomes, of formation programs.to understand and take responsibility.

Third, this study has emphasised the importance of appropriate resourcing for formation programs. Those participating in the formation programs, formators and candidates, require a commitment of time, a commitment which will be demanding. On the part of existing

canonical governors, it requires time for their further development for their human, spiritual and intellectual nourishment to enable them to achieve the pastoral goals of the ministry.

Fourth, the study identified a problem with Church language. It found that people were using key terms differently – for example justice, compassion, respect for persons and Catholic identity. It is possible that an element of the poor perception may arise from the concepts being interpreted differently by different people.

Fifth, interviewees who were currently canonical governors all spoke with passion for the role and articulated the difficulty of leading when needs far outstripped the resources of the ministry.

In reflecting on difficult decisions they had made, they noted that some people, when evaluating their decisions, but not having been part of the decision process, may consider such decisions to lack justice or compassion when, in fact, these values had been considered in the process, a process characterised by ethical dilemmas. The term 'Gospel values' is often stated as if they provided a simple answer, but serious reflection on the values highlights that the values such as justice and compassion are in tension and may not, at times, be easily accommodated in difficult decisions. This can be highlighted with the following examples: when justice is meted out to us, we might beg for mercy; when someone is given a lenient decision, the cry is "where's the justice in that?". The canonical governors had clearly experienced such comments from their decisions.

Sixth, in the Human Dimension, this study has identified that canonical governors need to be people with well-developed human maturity to be able to deal with the number and complexity of concepts and issues involved in canonical governance of Church ministries.

Canonical governors need to be self-aware. This study found that they need to be able to deal with praise and criticism of the ways in which they carry out their responsibilities for governance.

Seventh, in the Spiritual Dimension, this study has identified that there is the need for formation to nurture one's vocation to the role of canonical governor.

This requires a framework of lay spirituality with the "different richness" which that background brings to the role. This will require trust and understanding on the part of Church leaders to believe that 'different' is not 'wrong' (Kirkwood, 2012a). One's engagement with the vocation to the role is an integral element on the spiritual journey from the baptismal call which was the message of renewal from the Bishops of the Vatican Council.

Eighth, in the Intellectual Dimension, this study has identified that canonical governors need to have sufficient theological literacy to appreciate that, in the Church, there has always been a range of theological views and that there is continuing need to discern appropriate approaches in context for the ministry.

In particular, the study identified the need for canonical governors to understand how the Church operates (ecclesiology). They also need to understand the purpose of the Church (missiology). Further, canonical governors need to be able to discern the appropriate emphasis of Church mission for the context of the ministry and ensure that the mission of the ministry is always aligned with the mission of the Church. Canonical governors' understanding for this would be assisted by formation in Catholic Social Teaching.

Ninth, the study found that the legal basis for canonical governance – Canon Law – was poorly understood.

Canonical governors need some background in the relevant aspects of Canon Law. These include the law on governance, the rights of people, the mission of the Church and the temporal goods of the Church. Indeed, one's background in Church law should have at least comparable priority to one's background in civil law, particularly for those governors in a structure which requires them to undertake canonical and civil responsibilities.

Tenth, in the Pastoral Dimension, the study identified that canonical governors needed to understand the importance of leadership in governance.

Eleventh, while Bishops are concerned that lay people may not be capable of undertaking the role, there has been a misplaced perception that the leaders of Religious Institutes always understood their responsibilities for governance. Formator interviewees identified many examples that showed that leaders of Religious Institutes came to the role with significant theological background, but limited understanding of governance, canonical or civil.

Twelfth, the study identified that there is concern, particularly among interviewees who were theologians, that people can be appointed to the role of canonical governance who are not Catholic, a position that has responsibility for an aspect of the mission of the Church.

In all, the study identified that to lead a Catholic ministry, one requires a foundational understanding of mission and ministry. For the sake of Church mission and its enactment in the ministries, the study highlighted the need for formation in understanding Catholic identity and the capacity to articulate that identity for those working in the ministry. In particular ministries, the mission and charism of a founding Religious Institute may also be an inspiring influence. Canonical governors need to understand the relationship between the mission of the

ministry and the mission of the Church in order to maintain the Catholic identity and integrity of the institution and its ministry.

The role of canonical governor is essential for the continuing mission of the Church as it is expressed through the ministries.

8.4   Recommendations

A number of recommendations for formation for canonical governance can be made from the findings and conclusions of this study. These are presented in the following sections.

8.4.1   Understanding Canonical Concept of Public Juridic Person

One of the difficulties encountered in the research was the use of language. For instance, the term Public Juridic Person was not well known, even by religious. One reason may be that the term only came into Church language in the 1983 Code of Canon Law and it was not widely spoken about or examined until the need for alternative governance models emerged in the late 1980s (Austin, 2011). Religious Institutes, dioceses and parishes were regarded as 'moral persons' under the previous 1917 code (Austin, 2011, p. 69). As a result of the changes in ministry leadership, more has been written about the meaning of the Public Juridic Person. However, this new emphasis on canonical structures, as this study has revealed, has not been matched by the theological understanding deemed desirable for appropriate canonical governance (Bouchard, 2008).

In light of this study, it is recommended that the framework for formation developed in this study be a basis for formation for canonical governance, including the development of definitions and glossary of frequently used terms, some of which are still developing new meanings in this new area of life in the Church.

8.4.2   Formation Needs for Different Types of Public Juridic Persons

One of the issues which arose in the interviews was the confusion as to 'who' needs to be formed for canonical governance across different types of Public Juridic Persons. One type of PJP has individual members (natural persons) appointed to the responsibility and here the recipients are easily identified for assessment of needs for formation.

In such circumstances, it is recommended that the needs for formation are assessed using the items and dimensions of the framework developed in this study.

Another type of Public Juridic Person has Public Juridic Persons as the members. The Public Juridic Person members may be dioceses, parishes, Religious Institutes or a combination of those Public Juridic Persons. Each member is represented by a natural person and these natural persons usually elect or appoint people to conduct the ministry at a civil governance level. For the operation of the ministry in the name of the Church, the natural persons representing the Public Juridic Persons as well as those appointed to conduct the ministry may be regarded as requiring formation as canonical governors. As such, both groups may be the focus of formation needs assessment, although the nature and scope of the assessment and canonical governance responsibilities may vary. For example, the representatives of the Public Juridic Persons, having appointed the civil governing group, may have little on-going governance responsibilities until the next Annual General Meeting.

The study identified that the canonical governance responsibilities need to be understood by boards and senior management for the implementation and reporting. Where Public Juridic Persons are the members (of which there might be 20) all parties require adequate formation. For member representatives of the Public Juridic Persons this involves understanding the responsibility for choosing the leadership group (of which there might be 5) as well as formation of the leadership group to understand the canonical as well as civil accountabilities of the ministry.

Seen in this light, it is recommended that further research be undertaken to clarify and articulate the responsibilities of member representatives and appointed Trustees so that formation for each can be appropriately designed and implemented.

8.4.3 Definition of Formation

In the study, the researcher found it necessary to create a definition of 'formation' as most of the literature assumed the readers understood formation and wrote in terms of expected outcomes. This can be attributed to the long term use in the areas of clerical and religious formation where patterns of formation have been established and entrenched for centuries.

However, as lay candidates are not undergoing these long established patterns of formation, the term needed to be more clearly defined. The definition set out in Section 2.6.4 referred to formation as:

> *a reflected development on one's gifts and how the gifts contribute to the need in hand providing an holistic preparation of a person for a role – human, spiritual, intellectual, pastoral – including reflection on the experiences of their own life which*

might highlight some lacks in development or knowledge that are essential for that need.

Since the commencement of the research, Bouchard (2009) provided a definition of formation which was similar in many respects. He fixed it in religious language, but included reference to formation as a 'transformative process' indicating that some change is to be expected from the process (p. 40), as follows:

'Formation' is a transformative process, rooted in theology and spirituality, that connects us more deeply with God, creation and others.

Through self-reflection it opens us to God's action so that we derive meaning from the work we do, grow in awareness of our gifts, see our work as vocation and build a communal commitment to the ministry of health care.

As a consequence, it is recommended that a definition of formation drawn from the above definitions and related literature, be articulated as a core component of formation programs. This would provide clarity for participants and facilitators alike on the meaning and purpose of the teaching and learning activity involved.

On the broader question of language and definitions, it is recommended definitions be developed for key concepts in the field. These definitions will give a basis for engaging with the concepts, exploring what they mean and how they would be used in the particular ministries.

8.4.4   Teachings of Vatican Council II

There was little evidence of adequate understanding of the canonical governance implications of the teachings of the Vatican Council II among the laity. Interviewees were concerned that this was the result of a lack of committed teaching on the part of the Church leaders, and the consequent lack of understanding has implications for the task of forming the current thinking and practice of mission and ministry (Confoy, 2008). The concern in the minds of the interviewees in this study was that a solid intellectual and spiritual foundation was lacking, and this was a weakness in preparing canonical governors appropriately to make decisions for the ministry and the mission of the Church.

In light of these findings, it is recommended that Church leaders seek to engage the faithful in the teachings of the Vatican Council as part of the reforms which the Council called for. This would see development in the areas of formation noted in this study, namely – understanding of and response to baptismal call and a deepening spirituality, engagement with

the Word of God and an understanding of the role of canonical governors in the mission of the Church. Greater effort along these lines would provide more fertile ground for the call to the ministry of governance.

8.4.5   The Place of Holiness and Personal Involvement

The history of ministries involving the Religious Institutes was that people joined the institute in search of personal salvation and the ministries were the 'good works' that the members became involved with as part of the process of self-sanctification or the finding of God in one's life and co-operating in the mission of Jesus. Wittberg (2006) described the role of religious as that of *religious virtuosi*. The reality now is that the ministries are beyond what the religious are capable of (Gottemoeller, 2005; Grant & Vandenberg, 1998; Schweickert, 2002; Wittberg, 1991, 1993, 1994, 1998, 2000, 2006). However, the question arises as to whether or how the ministries are now 'Catholic ministries', or 'places of holiness' and whether people seek a personal engagement with God in the ministries (Lennan, 2005). For this study, the question particularly applies to the canonical governance of the ministries.

The issue is how the Religious Institutes involve lay people in canonical governance and formation in leadership that recognises their lay spirituality rather than imposing a regime of religious life (Abeles, 2008; Casey, 2010; Fox, 2005a).

It is recommended that further research is done into the understanding of holiness in lay spirituality and the role of the ministries in leading people into a deeper relationship with God through their role as canonical governors. The research might build on the work of Casey, (1991, 2005), Fox (2003, 2005a, 2010b), Hahnenberg (2003, 2004, 2009, 2010), and Wood (2009, 2003). The research might also investigate whether the canonical governors become the *religious virtuosi* as described by Wittberg (2006) and if not, where does the role lie in the new arrangements for the ministries.

8.4.6   The Ministry of Canonical Governance

The limited literature on recognising canonical governance as an ecclesial ministry was noted in Section 2.6.1. In understanding ministry as a public service to the Church (O'Meara, 1999), naming the responsibility of canonical governance as a ministry seems appropriate. Further, the reality is that many people are fulfilling that role and there is confusion among all the parties, Bishops, religious leaders and lay appointees as to what the actual status is.

In describing the elements of appointment to ecclesial ministry in a diocesan or parish setting, the Bishops in *Co-workers* set out certain conditions which need to be met. These

included appropriate authorisation to serve, leadership in a ministry, and close mutual collaboration with the pastoral ministry of the relevant clergy. These appear to be relevant conditions for what is asked of canonical governors.

A fourth condition regarded the appropriate preparation and formation for the level of responsibility being assigned. This study addressed the question of formation for canonical governance and one of the complex issues was the amount of time required to undertake the formation, whether by formal or informal process. The number of traits seen as relevant across the dimensions from the study indicated that, for formation to be taken seriously, significant time would be required of candidates and by those responsible for preparing candidates.

It is recommended that canonical governance be recognised as a ministry in the Church, appropriate formation for the role become accepted practice and that such formation takes into account the level of responsibility being assigned and is resourced accordingly..

It is recommended that Hahnenberg's (2003) development of models for the reality of ministry be investigated as a useful basis for modelling the relationship of the ministry with the responsibilities to the Bishop in the diocese and built into the formation program for canonical governance including recognition of the amount of time required..

8.4.7   Vocation to the Ministry of Canonical Governance

The interaction of the topics of the previous two sections creates the proposition that a person's involvement in this ministry is a vocation or call, and that this will impact on their spiritual development or 'holiness'.

The term and concept of 'vocation' was a recurring thread in the study and this is especially evident in Sections 7.4.2 and 7.4.2.2.

Canonical governors take on responsibility for an aspect of the mission of the Church and need to understand that such responsibility requires their commitment to that mission. Undertaking that responsibility will impact on personal beliefs, and formation is needed to help people explore those beliefs.

In taking this approach in formation, it can also be expected that some candidates come to a realisation that, for a range of reasons, they will not continue along the path that might have seen them take up the role. This scenario has implications for the time involved by those organising the formation and preparation of candidates.

The term 'candidate' has been used because the preparation is being seen as becoming formed to enter a role with an appropriate understanding. There can also be an expectation of being chosen, not that appointment will be automatic. This is necessary as formators will need to allow for attrition in the process. Candidates require the human maturity to appreciate that what they are undertaking is a path in their life's journey, in lay spirituality. This journey is asking them to trust what God might be calling them to in their life as a consequence of their baptism. Some may see that they do not wish to continue on the journey. Others may be advised that their talents lie elsewhere. Such invitations and journeys involve risk and challenge.

In light of these arguments, it is recommended that formation for canonical governance include the opportunity to engage candidates and governors in the exploration of their calling to the ministry of governance.

8.4.8   Evolution and Development of Formation Programs for Canonical Governance

As stated in Section 8.3, laity in canonical governance in ministry is a new area of development in the Church. It is to be expected that there have been difficult times and learnings in the journey by those who have gone before, with painful lessons yet to be learnt. The study has had wonderful support from those who have been involved in the journey for many years. That support has included their survey responses interviewee comments, particularly at their concern at the low response with regard to the perception of how the traits are seen in action.

While formation programs have been in place for canonical governance (usually termed "Sponsorship" in North America), the study found strong support for identified traits for canonical governors and a strong perception that the traits were not in evidence. This raised the question not addressed in this study, as to why outcomes from programs in place are not being perceived to be bearing fruit.

It is recommended that research be undertaken to identify if this perception is correct, and, if so, to address deficiencies that have been identified using the framework for formation developed through this study as consisting of:

    i.   Ecclesial literature foundations;

    ii. Means of identifying the formation needs; and

iii. Principles underpinning the nature of traits relevant for canonical governors, the identification of the formation needs, and the use of the results of the needs analysis.

8.4.9 The Role of Bishops and Canonical Formation

The development of the new canonical governance structures has left some Bishops with concerns about the continuing Catholic identity of the ministries. In Section 6.4.2.9, the study found that most people involved in leadership of Public Juridic Persons understood the responsibility of the Bishop for the pastoral guidance of the diocese and the coordination of ministries.

The study also noted that a Bishop can have multiple roles in a Public Juridic Person. In some cases, the diocese is a member of a Public Juridic Person. Some Bishops have opted to be the member's representative. Others have appointed another person. In other cases, a group wanting to set up a Public Juridic Person need the approval of the Bishop as the competent ecclesiastical authority. In still other cases, the group wanting to set up a Public Juridic Person of Pontifical right need the opinion (and hopefully support) of the Bishop.

The study identified that the question of Catholic identity is a theological issue but the emphasis in setting up Public Juridic Persons has been more on the canonical structures rather than theological development (Austin, 2011; Beal, 2004; Di Pietro, 2006; Euart, 2005; Hagstrom, 1996; Hite, 2000; Morrisey, 2007a; Sweeney, 2001, 2005). The study found very little literature on formation needs for canonical governors and the survey responses reflected that the fruits of formation were not being perceived. The study has provided a case for the formation for canonical governors to take responsibility for the role in Church mission.

Given the Bishop's responsibilities for ministry coordination and identity, Bishops would be assisted to be confident that Public Juridic Persons were being set up with appropriate resourcing and guidance. They would be assisted in this if they were shown the formation program being used for the intended canonical governors and were made aware that the formation was being developed from an appropriate framework which included all the agreed dimensions.

It is recommended that, as part of preparation for setting up a Public Juridic Person, Bishops are provided with an outline of the formation program for canonical governors, using the framework developed in this study. Bishops should also be assured that the program is being enacted.

8.4.10 Catholic Identity

The study explored the use of the term 'Catholic Identity'. An awareness has grown among Catholics that what was taken for granted as 'Catholic', with its signs, symbols, practices and language can no longer be assumed to be imbued in the culture. Cleary (2007) explored this cultural development and the impact on 'meaning systems' of Catholic identity when dealing with managers of Catholic human services. As indicated in the literature, meaning systems refers to the way people create meaning through their life and values, not just as individuals, but as a group and culture. The study showed that the issue of Catholic Identity applies to the governance level as well. If the language of 'Catholic Identity' is not to be reduced to a catch-cry or the implication that 'Catholic Identity' be reduced to one theological way of seeing the world, canonical governors need to understand what is involved in the concept and how their ministry attends to the question of 'Catholic Identity'. They will be assisted in this through engagement with the long history of the Catholic Social Tradition and its current expression in Catholic Social Teaching. Formators for canonical governance candidates would benefit from an understanding of the change in meaning systems that has been and is going on in the Church and in the world.

It is recommended that canonical governors be formed in the light of the breadth of the meaning of 'Catholic Identity'; and that formators provide a program of adequate depth regarding 'Catholic Identity'.

8.4.11 Catholic Commitment

The study identified concerns regarding the appointment of people not in communion with the Catholic Church to the role of canonical governor as set out in Section 7.4.2.5.

In the light of the concern and the newness of the situation, it is recommended that the rationale for the appointment to canonical governance of persons not in communion with the Church be provided by the Congregation for Institutes of Consecrated Life and Societies of Apostolic Life (CICLSAL) as the competent Church authority.

8.5 Chapter Summary

This chapter summarised the research finding, drew conclusions and set out recommendations from the research in the light of the findings with regard to formation needs for the role of canonical governor and proposing a framework as a basis for attending to the formation needs.

This was done in the light of the literature available, drawing on the tradition for formation of the Catholic Church and applying elements to a field which is newly developing because of changes in the Church and the world. The Church's past experience of governance systems is no longer sustainable for many ministries and lay people are undertaking governance roles with limited formation to understand the canonical responsibilities.

The study has provided support for the above claim, identified relevant traits to address the problem as well as a framework within which formation programs can be created, using dimensions already promoted and in use in formation in the Church.

If this formation can be undertaken with courage and trust, as called for in *Ad Gentes* (n 25), the call of the Council will become a reality in a field the Council did not, at the time, imagine:

> A sower went out to sow his seed; And as he sowed, some fell on the path and was trampled, and the birds of the sky ate it up. Some seed fell on rocky ground, and when it grew, it withered for lack of moisture. Some seed fell among thorns, and the thorns grew with it and choked it. And some fell on good soil, and when it grew, it produced fruit a hundredfold." After saying this, he called out, "Whoever has ears to hear ought to hear." (Luke 8:5-8)

Good soil isn't everywhere and it needs preparation and, at times, further cultivation to be able to maintain the responsibility for what is dreamed and expected from it. May the fruits of this study aid the cultivation.

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Appendices

Appendix 1   Survey Questions, with Literature Sources

Survey Questions 1–12: Human Capabilities Essential for Canonical Governors

Q 1	Canonical Governors are people of integrity Source: (Pope John Paul II, 1992, 26) (United States Conference of Catholic Bishops, 2005, p. 36)
Q 2	Canonical Governors exhibit balance in judgement Source:(Pope John Paul II, 1992, 33, 43) (USCCB, 2005, p. 36)
Q 3	Canonical Governors possess a deep sense of justice Source:(Pope John Paul II, 1992, 43) (USCCB, 2005, p. 37)
Q 4	Canonical Governors are genuinely compassionate Source: (Pope John Paul II, 1992, 43)
Q 5	Canonical Governors show a genuine concern for others Source: (Pope John Paul II, 1992, 43; USCCB, 2005, p. 37)
Q 6	Canonical Governors possess well-developed personal maturity Source: (Pope John Paul II, 1992, 43; USCCB, 2005, p. 36)
Q 7	Canonical Governors demonstrate self-knowledge Source: (USCCB, 2005, p. 36)
Q 8	Canonical Governors respect every person Source: (Pope John Paul II, 1992, 43; USCCB, 2005, pp. 37, 60)
Q 9	Canonical Governors are aware of their gifts Source: (USCCB, 2005, pp. 36, 48)
Q 10	Canonical Governors demonstrate an ability to learn from praise Source: (USCCB, 2005, p. 37)
Q 11	Canonical Governors exhibit balance in behaviour Source: (Pope John Paul II, 1992, 33, 43; USCCB, 2005, p. 60)
Q 12	Canonical Governors demonstrate an ability to learn from criticism Source: (USCCB, 2005, p. 37)

Survey Questions 13–22: Relevant Spiritual Capabilities for Canonical Governors

Q 13	Canonical Governors understand their baptismal call to mission Source: (Downey, 2003; Fox, 2003; Hagstrom, 2003; Pope John Paul II, 1988; 1992, 17; Rinere, 2003; USCCB, 2005, pp. 12, 48, 49)
Q 14	Canonical Governors have a sense of vocation to the role Source: (Hagstrom, 2003; Hahnenberg, 2003; USCCB, 2005, p. 12; Winschel, 2008)
Q 15	Canonical Governors are aware that spiritual formation requires individuals to be open to the transcendent Source: (McTernan, 2005; Pope John Paul II, 1988, 16; 1992, 45; USCCB, 2005, p. 7)
Q 16	Canonical Governors view their role as a Ministry of Governance Source: (Austin, 2000; Cunningham, 1986; Hagstrom, 1996; Huels, 1986, 2000; Morrisey, 2007c; Willis, 1986)
Q 17	Canonical Governors understand that spiritual formation is about living intimately united to the Word of God Source: (Casey, 1991; MacLennan & Marr, 2008; Pope John Paul II, 1992; Thornhill, 2007; USCCB, 2005)
Q 18	Canonical Governors are committed to the mission of the Church Source: (Arbuckle, 2000, 2005; Grant, 2001a; Hahnenberg, 2003; K. Homan, 2004; Hume, 1999; G. Kelly, 2007; Lucas, 2007; Place, 2004; Pope John Paul II, 1992, 32; USCCB, 2005, p. 19; Yanofchick, 2007a)
Q 19	Canonical Governors are aware that spiritual formation aims for a daily growing in love of God and neighbour. Source: (Casey, 1991; Pope John Paul II, 1992, 45; USCCB, 2005, p. 38)
Q 20	Canonical Governors understand that they are a bridge for people to Christ Source: (Gottemoeller, 2007; Pope John Paul II, 1992, 43)
Q 21	Canonical Governors enjoy a public identification with the Catholic ecclesial community expressed in a variety of ways Source: Morrisey, 2002; Roman Catholic Church, 1983, Cn 116 (1), 149, 204, 298, 1282
Q 22	Spiritual formation involves practices of prayer and spirituality that foster these attitudes and dispositions Source: (Pope John Paul II, 1992, 33, 48; USCCB, 2005, p. 59)

Survey Questions 23–33: Intellectual Capabilities of Canonical Governors

Q 23	Canonical Governors understand that the catholic faith is rooted in God's revelation Source: (Pope John Paul II, 1992, 53; USCCB, 2005, p. 42)
Q 24	Canonical Governors understand that the catholic faith is embodied in the living tradition of the Church Source: (Pope John Paul II, 1992, 54; USCCB, 2005, p. 42)
Q 25	Canonical Governors are aware that formation for lay ecclesial ministry is a journey beyond catechesis into theological reflection Source: (Hahnenberg, 2003; USCCB, 2005)
Q 26	Canonical Governors have some background in missiology Source: (Pope John Paul II, 1992, 54)
Q 27	Canonical Governors have some background in ecclesiology Source: (Pope John Paul II, 1992, 12; USCCB, 2005, p. 46)
Q 28	Canonical Governors have some background in Canon Law Source: (Abeles, 2008; P. Smith, 2006b; USCCB, 2005)
Q 29	Canonical Governors are able to articulate the missiology which underpins the operation of the ministry Source: (USCCB, 2005)
Q 30	Canonical Governors use theology to help understand the needs of the time in the light of Scripture and Tradition Source: (Pope John Paul II, 1992, 26; USCCB, 2005, p. 47)
Q 31	Canonical Governors have a sound knowledge of the Catholic Social Teaching Source: (Pope John Paul II, 1992, 12; USCCB 2005, p. 52)
Q 32	Canonical Governors have a sound knowledge of the Catechism of the Catholic Church Source: (USCCB, 2005, p. 43)
Q 33	Canonical Governors seek to develop their appreciation of the Catholic Faith through intellectual formation Source: (Pope John Paul II, 1992, 53; USCCB, 2005, p. 42)

Survey Questions 34–43: Pastoral Capabilities Important for Canonical Governors

Q 34	Canonical Governors have an understanding of the ministry they lead Source: (Hahnenberg, 2003; Morrisey, 2007a, 2007c)
Q 35	Canonical Governors understand their responsibility for the ongoing Catholic identity of the ministry Source: (Arbuckle, 2006, 2007a; Casey, 2000; Clifton & McEnroe, 1994; Curran, 1997; Hehir, 2008; Morrisey, 2007c)
Q 36	Canonical Governors work together in the ministry of leadership to discern the signs of the times for the mission of the Church Source: (Pope John Paul II, 1992, 26; USCCB, 2005, p. 47)
Q 37	Canonical Governors have an appropriate way of calling those leading the operation of the ministry to account (CHAUSA, 2009; Lakeland, 2004; Zagano, 2007)
Q 38	Canonical Governors understand the responsibilities of the local Bishop for the coordination of ministerial services in the diocese Source: (Cusack, 2007, 2008; Euart, 2005; USCCB, 2005, pp. 12, 52)
Q 39	Canonical Governors use mission-based criteria in forming future governors and leaders Source: (CHAUSA, 2006a, 2007a, 2009; Gottemoeller, 2007; Stanley, 2007; Statuto, 2004; Weisenbeck, 2007; Yanofchick, 2007a, 2007b)
Q 40	Canonical Governors understand organisational systems and dynamics Source: (Pope John Paul II, 1992, 66; USCCB, 2005, pp. 48, 49)
Q 41	Canonical Governors understand that they have a responsibility for the spiritual life of the ministries Source: (Casey, 1991; USCCB, 2005, pp. 14, 51)
Q 42	Canonical Governors inspire communal purpose and vision Source: (Downey, 2005; S. M. Homan et al., 2003)
Q 43	Canonical Governors use mission-based criteria in selecting future governors and leaders Source: (CHAUSA, 2006a, 2007a, 2009; Gottemoeller, 2007; Stanley, 2007; Statuto, 2004; Weisenbeck, 2007; Yanofchick, 2007a, 2007b)

Appendix 2   Responses to Survey Items

This trait is desirable				Actual practice you have observed			
1 Canonical Governors are people of integrity							
Strongly Agree	81	88.04%			Very High	38	41.30%		
Agree	9	9.78%	90	97.82%	High	40	43.48%	78	84.78%
Disagree	1	1.09%			Fair	9	9.78%		
Strongly Disagree	0	0.00%			Low	0	0.00%		
No answer	1	1.09%			Unable to Judge	1	1.09%		
					No answer	4	4.35%		
2 Canonical Governors exhibit balance in judgement							
Strongly Agree	61	66.30%			Very High	11	11.96%		
Agree	29	31.52%	90	97.82%	High	56	60.87%	67	72.83%
Disagree	1	1.09%			Fair	17	18.48%		
Strongly Disagree	0	0.00%			Low	2	2.17%		
No answer	1	1.09%			Unable to Judge	2	2.17%		
					No answer	4	4.35%		
3 Canonical Governors possess a deep sense of justice							
Strongly Agree	63	68.48%			Very High	18	19.57%		
Agree	27	29.35%	90	97.83%	High	42	45.65%	60	65.22%
Disagree	0	0.00%			Fair	23	25.00%		
Strongly Disagree	0	0.00%			Low	2	2.17%		
No answer	2	2.17%			Unable to Judge	3	3.26%		
					No answer	4	4.35%		
4 Canonical Governors are genuinely compassionate							
Strongly Agree	53	57.61%			Very High	18	19.57%		
Agree	35	38.04%	88	95.65%	High	43	46.74%	61	66.31%
Disagree	3	3.26%			Fair	18	19.57%		
Strongly Disagree	0	0.00%			Low	2	2.17%		
No answer	1	1.09%			Unable to Judge	6	6.52%		
					No answer	5	5.43%		
5 Canonical Governors show a genuine concern for others							
Strongly Agree	56	60.87%			Very High	18	19.57%		
Agree	33	35.87%	89	96.74%	High	51	55.43%	69	75.00%
Disagree	1	1.09%			Fair	18	19.57%		
Strongly Disagree	0	0.00%			Low	0	0.00%		
No answer	2	2.17%			Unable to Judge	0	0.00%		
					No answer	5	5.43%		
6 Canonical Governors possess well-developed personal maturity							
Strongly Agree	62	67.39%			Very High	11	11.96%		
Agree	28	30.43%	90	97.82%	High	48	52.17%	59	64.13%
Disagree	1	1.09%			Fair	27	29.35%		
Strongly Disagree	0	0.00%			Low	1	1.09%		
No answer	1	1.09%			Unable to Judge	1	1.09%		
					No answer	4	4.35%		

7 Canonical Governors demonstrate self-knowledge								
Strongly Agree	44	47.83%			Very High	5	5.43%		
Agree	41	44.57%	85	92.40%	High	38	41.30%	43	46.73%
Disagree	4	4.35%			Fair	28	30.43%		
Strongly Disagree	0	0.00%			Low	4	4.35%		
No answer	3	3.26%			Unable to Judge	10	10.87%		
					No answer	7	7.61%		

8 Canonical Governors respect every person								
Strongly Agree	58	63.04%			Very High	13	14.13%		
Agree	28	30.43%	86	93.47%	High	41	44.57%	54	58.70%
Disagree	4	4.35%			Fair	26	28.26%		
Strongly Disagree	0	0.00%			Low	4	4.35%		
No answer	2	2.17%			Unable to Judge	2	2.17%		
					No answer	6	6.52%		

9 Canonical Governors are aware of their gifts								
Strongly Agree	27	29.35%			Very High	12	13.04%		
Agree	57	61.96%	84	91.31%	High	64	69.57%	76	82.61%
Disagree	6	6.52%			Fair	10	10.87%		
Strongly Disagree	0	0.00%			Low	2	2.17%		
No answer	2	2.17%			Unable to Judge	4	4.35%		
					No answer	0	0.00%		

10 Canonical Governors demonstrate an ability to learn from praise								
Strongly Agree	12	13.04%			Very High	2	2.17%		
Agree	64	69.57%	76	82.61%	High	36	39.13%	38	41.30%
Disagree	10	10.87%			Fair	29	31.52%		
Strongly Disagree	2	2.17%			Low	4	4.35%		
No answer	4	4.35%			Unable to Judge	14	15.22%		
					No answer	7	7.61%		

11 Canonical Governors exhibit balance in behaviour								
Strongly Agree	38	41.30%			Very High	6	2.17%		
Agree	49	53.26%	87	94.56%	High	49	33.70%	55	35.87%
Disagree	1	1.09%			Fair	27	40.22%		
Strongly Disagree	0	0.00%			Low	2	7.61%		
No answer	4	4.35%			Unable to Judge	1	8.70%		
					No answer	7	7.61%		

12 Canonical Governors demonstrate an ability to learn from criticism								
Strongly Agree	30	32.61%			Very High	2	2.17%		
Agree	55	59.78%	85	92.39%	High	31	33.70%	33	35.87%
Disagree	2	2.17%			Fair	37	40.22%		
Strongly Disagree	1	1.09%			Low	7	7.61%		
No answer	4	4.35%			Unable to Judge	8	8.70%		
					No answer	7	7.61%		

13 Canonical Governors understand their baptismal call to mission									
Strongly Agree	65	70.65%			Very High	21	22.83%		
Agree	23	25.00%	88	95.65%	High	37	40.22%	58	63.05%
Disagree	3	3.26%			Fair	20	21.74%		
Strongly Disagree	0	0.00%			Low	8	8.70%		
No answer	1	1.09%			Unable to Judge	2	2.17%		
					No answer	4	4.35%		

14 Canonical Governors have a sense of vocation to the role									
Strongly Agree	54	58.70%			Very High	18	19.57%		
Agree	35	38.04%	89	96.74%	High	39	42.39%	57	61.96%
Disagree	1	1.09%			Fair	22	23.91%		
Strongly Disagree	0	0.00%			Low	7	7.61%		
No answer	2	2.17%			Unable to Judge	2	2.17%		
					No answer	4	4.35%		

15 Canonical Governors are aware that spiritual formation requires individuals to be open to the transcendent									
Strongly Agree	56	60.87%			Very High	16	17.39%		
Agree	29	31.52%	85	92.39%	High	31	33.70%	47	51.09%
Disagree	3	3.26%			Fair	24	26.09%		
Strongly Disagree	0	0.00%			Low	6	6.52%		
No answer	4	4.35%			Unable to Judge	10	10.87%		
					No answer	5	5.43%		

16 Canonical Governors view their role as a ministry of governance									
Strongly Agree	61	66.30%			Very High	23	25.00%		
Agree	27	29.35%	88	95.65%	High	38	41.30%	61	66.30%
Disagree	3	3.26%			Fair	21	22.83%		
Strongly Disagree	0	0.00%			Low	7	7.61%		
No answer	1	1.09%			Unable to Judge	0	0.00%		
					No answer	3	3.26%		

17 Canonical Governors understand that spiritual formation is about living intimately united to the Word of God									
Strongly Agree	42	45.65%			Very High	9	9.78%		
Agree	40	43.48%	82	89.13%	High	32	34.78%	41	44.56%
Disagree	7	7.61%			Fair	30	32.61%		
Strongly Disagree	0	0.00%			Low	9	9.78%		
No answer	3	3.26%			Unable to Judge	5	5.43%		
					No answer	7	7.61%		

18 Canonical Governors are committed to the mission of the Church									
Strongly Agree	65	70.65%			Very High	29	31.52%		
Agree	24	26.09%	89	96.74%	High	33	35.87%	62	67.39%
Disagree	1	1.09%			Fair	22	23.91%		
Strongly Disagree	1	1.09%			Low	3	3.26%		
No answer	1	1.09%			Unable to Judge	1	1.09%		
					No answer	4	4.35%		

19 Canonical Governors are aware that spiritual formation aims for a daily growing in love of God and neighbour									
Strongly Agree	43	46.74%			Very High	11	11.96%		
Agree	44	47.83%	87	94.57%	High	35	38.04%	46	50.00%
Disagree	3	3.26%			Fair	29	31.52%		
Strongly Disagree	0	0.00%			Low	4	4.35%		
No answer	2	2.17%			Unable to Judge	9	9.78%		
					No answer	4	4.35%		
20 Canonical Governors understand that they are a bridge for people to Christ									
Strongly Agree	21	22.83%			Very High	1	1.09%		
Agree	46	50.00%	67	72.83%	High	22	23.91%	23	25.00%
Disagree	16	17.39%			Fair	38	41.30%		
Strongly Disagree	3	3.26%			Low	15	16.30%		
No answer	6	6.52%			Unable to Judge	8	8.70%		
					No answer	8	8.70%		
21 Canonical Governors enjoy a public identification with the Catholic ecclesial community expressed in a variety of ways									
Strongly Agree	42	45.65%			Very High	15	14.29%		
Agree	36	39.13%	78	84.78%	High	24	31.17%	39	45.46%
Disagree	12	13.04%			Fair	23	29.87%		
Strongly Disagree	0	0.00%			Low	12	15.58%		
No answer	2	2.17%			Unable to Judge	4	5.19%		
					No answer	3	3.90%		
22 Canonical Governors are aware that spiritual formation involves the practices of prayer and spirituality that foster these (above) attitudes and dispositions									
Strongly Agree	50	54.35%			Very High	18	16.30%		
Agree	34	36.96%	84	91.31%	High	29	31.52%	47	47.82%
Disagree	5	5.43%			Fair	25	30.43%		
Strongly Disagree	0	0.00%			Low	10	13.04%		
No answer	3	3.26%			Unable to Judge	4	4.35%		
					No answer	6	4.35%		
23 Canonical Governors understand that the Catholic faith is rooted in God's revelation									
Strongly Agree	47	51.09%			Very High	13	14.13%		
Agree	41	44.57%	88	95.66%	High	35	38.04%	48	52.17%
Disagree	3	3.26%			Fair	28	30.43%		
Strongly Disagree	0	0.00%			Low	8	8.70%		
No answer	1	1.09%			Unable to Judge	4	4.35%		
					No answer	4	4.35%		
24 Canonical Governors understand that the Catholic faith is embodied in the living tradition of the Church									
Strongly Agree	45	48.91%			Very High	12	13.04%		
Agree	42	45.65%	87	94.56%	High	38	41.30%	50	54.34%
Disagree	3	3.26%			Fair	29	31.52%		
Strongly Disagree	0	0.00%			Low	5	5.43%		
No answer	2	2.17%			Unable to Judge	4	4.35%		
					No answer	4	4.35%		

25 Canonical Governors are aware that formation for ecclesial ministry is a journey beyond catechesis into theological reflection									
Strongly Agree	48	52.17%			Very High	15	16.30%		
Agree	35	38.04%	83	90.21%	High	23	25.00%	38	41.30%
Disagree	6	6.52%			Fair	27	29.35%		
Strongly Disagree	1	1.09%			Low	17	18.48%		
No answer	2	2.17%			Unable to Judge	5	5.43%		
					No answer	5	5.43%		
26 Canonical Governors need to have some background in missiology									
Strongly Agree	27	29.35%			Very High	2	2.17%		
Agree	44	47.83%	71	77.18%	High	24	26.09%	26	28.26%
Disagree	15	16.30%			Fair	31	33.70%		
Strongly Disagree	1	1.09%			Low	19	20.65%		
No answer	5	5.43%			Unable to Judge	9	9.78%		
					No answer	7	7.61%		
27 Canonical Governors need to have some background in ecclesiology									
Strongly Agree	37	40.22%			Very High	2	2.17%		
Agree	43	46.74%	80	86.96%	High	29	31.52%	31	33.69%
Disagree	10	10.87%			Fair	36	39.13%		
Strongly Disagree	0	0.00%			Low	14	15.22%		
No answer	2	2.17%			Unable to Judge	7	7.61%		
					No answer	4	4.35%		
28 Canonical Governors need to have some background in Canon Law									
Strongly Agree	29	31.52%			Very High	2	2.17%		
Agree	44	47.83%	73	79.35%	High	19	20.65%	21	22.82%
Disagree	17	18.48%			Fair	39	42.39%		
Strongly Disagree	0	0.00%			Low	23	25.00%		
No answer	2	2.17%			Unable to Judge	5	5.43%		
					No answer	4	4.35%		
29 Canonical Governors are able to articulate the missiology which underpins the operation of the ministry									
Strongly Agree	42	45.65%			Very High	2	2.17%		
Agree	41	44.57%	83	90.22%	High	30	32.61%	32	34.78%
Disagree	6	6.52%			Fair	32	34.78%		
Strongly Disagree	0	0.00%			Low	17	18.48%		
No answer	3	3.26%			Unable to Judge	6	6.52%		
					No answer	5	5.43%		
30 Canonical Governors use theology to help understand the needs of the time in the light of Scripture and Tradition									
Strongly Agree	35	38.04%			Very High	6	6.52%		
Agree	49	53.26%	84	91.30%	High	26	28.26%	32	34.78%
Disagree	5	5.43%			Fair	27	29.35%		
Strongly Disagree	1	1.09%			Low	21	22.83%		
No answer	2	2.17%			Unable to Judge	8	8.70%		
					No answer	4	4.35%		

31 Canonical Governors have a sound knowledge of Catholic social teaching								
Strongly Agree	51	55.43%			Very High	9	9.78%		
Agree	34	36.96%	85	92.39%	High	35	38.04%	44	47.82%
Disagree	4	4.35%			Fair	33	35.87%		
Strongly Disagree	1	1.09%			Low	9	9.78%		
No answer	2	2.17%			Unable to Judge	2	2.17%		
					No answer	4	4.35%		

32 Canonical Governors have a sound knowledge of the Catechism of the Catholic Church								
Strongly Agree	9	9.78%			Very High	3	3.26%		
Agree	58	63.04%	67	72.82%	High	27	29.35%	30	32.61%
Disagree	19	20.65%			Fair	31	33.70%		
Strongly Disagree	0	0.00%			Low	16	17.39%		
No answer	6	6.52%			Unable to Judge	9	9.78%		
					No answer	6	6.52%		

33 Canonical Governors seek to develop their appreciation of the Catholic Faith through intellectual formation								
Strongly Agree	28	30.43%			Very High	5	5.43%		
Agree	55	59.78%	83	90.21%	High	31	33.70%	36	39.13%
Disagree	2	2.17%			Fair	34	36.96%		
Strongly Disagree	2	2.17%			Low	11	11.96%		
No answer	5	5.43%			Unable to Judge	4	4.35%		
					No answer	7	7.61%		

34 Canonical Governors have an understanding of the ministry they lead								
Strongly Agree	70	76.09%			Very High	27	29.35%		
Agree	20	21.74%	90	97.83%	High	42	45.65%	69	75.00%
Disagree	1	1.09%			Fair	20	21.74%		
Strongly Disagree	0	0.00%			Low	1	1.09%		
No answer	1	1.09%			Unable to Judge	0	0.00%		
					No answer	2	2.17%		

35 Canonical Governors understand their responsibility for the ongoing Catholic identity of the ministry								
Strongly Agree	68	73.91%			Very High	30	32.61%		
Agree	21	22.83%	89	96.74%	High	40	43.48%	70	76.09%
Disagree	0	0.00%			Fair	17	18.48%		
Strongly Disagree	1	1.09%			Low	2	2.17%		
No answer	2	2.17%			Unable to Judge	1	1.09%		
					No answer	2	2.17%		

36 Canonical Governors work together to discern the signs of the times for the mission of the Church								
Strongly Agree	55	59.78%			Very High	14	15.22%		
Agree	32	34.78%	87	94.56%	High	33	35.87%	47	51.09%
Disagree	1	1.09%			Fair	33	35.87%		
Strongly Disagree	1	1.09%			Low	7	7.61%		
No answer	3	3.26%			Unable to Judge	2	2.17%		
					No answer	3	3.26%		

37 Canonical Governors have an appropriate way of calling those leading the operation of the ministry to account

Strongly Agree	57	61.96%			Very High	9	9.78%		
Agree	28	30.43%	85	92.39%	High	37	40.22%	46	50.00%
Disagree	2	2.17%			Fair	29	31.52%		
Strongly Disagree	1	1.09%			Low	9	9.78%		
No answer	4	4.35%			Unable to Judge	5	5.43%		
					No answer	3	3.26%		

38 Canonical Governors understand the responsibilities of the local Bishop for the coordination of ministerial services in the diocese

Strongly Agree	51	55.43%			Very High	13	14.13%		
Agree	34	36.96%	85	92.39%	High	29	33.77%	42	47.90%
Disagree	5	5.43%			Fair	33	35.06%		
Strongly Disagree	0	0.00%			Low	13	15.58%		
No answer	2	2.17%			Unable to Judge	2	1.30%		
					No answer	2	2.60%		

39 Canonical Governors use mission-based criteria* in forming future governors

Strongly Agree	46	50.00%			Very High	11	11.96%		
Agree	37	40.22%	83	90.22%	High	31	33.70%	42	45.66%
Disagree	3	3.26%			Fair	28	30.43%		
Strongly Disagree	1	1.09%			Low	11	11.96%		
No answer	5	5.43%			Unable to Judge	5	5.43%		
					No answer	6	6.52%		

40 Canonical Governors understand organisational systems and dynamics

Strongly Agree	35	38.04%			Very High	9	9.78%		
Agree	47	51.09%	82	89.13%	High	37	40.22%	46	50.00%
Disagree	6	6.52%			Fair	32	34.78%		
Strongly Disagree	1	1.09%			Low	7	7.61%		
No answer	3	3.26%			Unable to Judge	4	4.35%		
					No answer	3	3.26%		

41 Canonical Governors understand that they have a responsibility for the spiritual life of the ministries

Strongly Agree	47	51.09%			Very High	12	13.04%		
Agree	38	41.30%	85	92.39%	High	30	32.61%	42	45.65%
Disagree	2	2.17%			Fair	35	38.04%		
Strongly Disagree	1	1.09%			Low	10	10.87%		
No answer	4	4.35%			Unable to Judge	1	1.09%		
					No answer	4	4.35%		

42 Canonical Governors inspire communal purpose and vision

Strongly Agree	55	59.78%			Very High	12	13.04%		
Agree	29	31.52%	84	91.30%	High	34	36.96%	46	50.00%
Disagree	4	4.35%			Fair	33	35.87%		
Strongly Disagree	1	1.09%			Low	7	7.61%		
No answer	3	3.26%			Unable to Judge	2	2.17%		
					No answer	4	4.35%		

43 Canonical Governors use mission-based criteria* in selecting future governors								
Strongly Agree	46	50.00%			Very High	13	14.13%		
Agree	32	34.78%	78	84.78%	High	35	38.04%	48	52.17%
Disagree	6	6.52%			Fair	23	25.00%		
Strongly Disagree	1	1.09%			Low	9	9.78%		
No answer	7	7.61%			Unable to Judge	5	5.43%		
					No answer	7	7.61%		
Female	43	46.74%						
Male	49	53.26%						
Are you								
Board Member of a Ministry						47	51.09%	
Canonist						9	9.78%	
Involved in Formation for Public Juridic Person/Sponsorship						41	44.57%	
Leadership position in a Religious Institute						33	35.87%	
Member of Public Juridic Person						24	26.09%	
Member of a Religious Institute						48	52.17%	
Member of Trustees						27	29.35%	
Representative of Public Juridic Person						14	15.22%	
Senior Manager in a Ministry						17	18.48%	
Theologian						12	13.04%	
Membership of the People of God								
Bishop						2	2.17%	
Lay person not a member of a Religious Institute						27	29.35%	
Priest						4	4.35%	
Religious Brother						19	20.65%	
Religious Priest						5	5.43%	
Religious Sister						33	35.87%	
No answer						2	2.17%	
For how many years have you been involved with ministerial PJPs?								
less than 1 year						2	2.17%	
1 – 5 years						28	29.35%	
6 – 10 years						18	4.35%	
11 – 15 years						15	20.65%	
16 – 25 years						9	5.43%	
more than 25 years						15	35.87%	61.95%
No answer						5	2.17%	
Your Frame of Reference in responding has been:								
Involvement with one Juridic Person						30	32.61%	
Involvement with a number of Juridic Persons						29	31.52%	57.61%
Both of the above						24	26.09%	
Neither						8	8.70%	

What country are you responding from?				
Australia	54	58.70%		
Canada	4	4.35%		
England	1	1.09%		
Ireland	2	2.17%		
Italy/Vatican	2	2.17%		
New Zealand	1	1.09%		
United States of America	27	29.35%		
No answer	1	1.09%		

Appendix 3   Ethics Approval

Human Research Ethics Committee
Committee Approval Form

Principal Investigator/Supervisor: Professor Michael Gaffney Canberra Campus

Co-Investigators: Dr Patrick McArdle Canberra Campus

Student Researcher: Br John Henry Thornber Canberra Campus

Ethics approval has been granted for the following project:
Ensuring Fertile Soil. (Formation for Canonical Governance)
for the period: 23 April 2010 to 30 September 2010
Human Research Ethics Committee (HREC) Register Number: N2010 19

The following <u>standard</u> conditions as stipulated in the *National Statement on Ethical Conduct in Research Involving Humans* (2007) apply:

    (i)   that Principal Investigators / Supervisors provide, on the form supplied by the Human Research Ethics Committee, annual reports on matters such as:
- security of records
- compliance with approved consent procedures and documentation
- compliance with special conditions, and

    (ii)   that researchers report to the HREC immediately any matter that might affect the ethical acceptability of the protocol, such as:
- proposed changes to the protocol
- unforeseen circumstances or events
- adverse effects on participants

The HREC will conduct an audit each year of all projects deemed to be of more than low risk. There will also be random audits of a sample of projects considered to be of negligible risk and low risk on all campuses each year.

Within one month of the conclusion of the project, researchers are required to complete a *Final Report Form* and submit it to the local Research Services Officer.

If the project continues for more than one year, researchers are required to complete an *Annual Progress Report Form* and submit it to the local Research Services Officer within one month of the anniversary date of the ethics approval.

K. Pashley.

Signed: ..... Date: 23 April 2010
(Research Services Officer, McAuley Campus)

Appendix 4   On-line Survey Participant Letter

John Henry Thornber
35 Anderson St
Chatswood, NSW, 2067
Telephone 61 2 94123221

Signadou Campus
223 Antill Street Watson ACT 2602
PO Box 256 Dickson ACT 2602 Australia
Telephone: **02 6209 1218**
Facsimile: **02 6209 1215**
www.acu.edu.au

INVITATION TO PARTICIPANTS

TITLE OF PROJECT: Ensuring Fertile Soil – Formation for Canonical Governance

STUDENT RESEARCHER: John Henry Thornber

PRINCIPAL SUPERVISOR: Professor Michael Gaffney

PROGRAMME IN WHICH ENROLLED: Doctor of Education

Dear On Line Participant,

I am currently undertaking studies towards a Doctor of Education degree in educational leadership at the Australian Catholic University. The area of my research is *Formation of people for canonical leadership in the Catholic Church*. The study will explore the implications of people being invited to undertake leadership in ecclesial roles of governance formerly exercised by members of religious institutes. The research is focussed on current practices in formation for the role and is designed to develop guidelines for appropriate formation into the future.

The nature of the topic is such that the participants from whom I am seeking a response in an on line survey need to have a background and understanding of 'Public Juridic Persons' as governance structures for Church ministries in health, welfare and education. While there may be some inconvenience of time, it is not envisaged that project involvement will be an onerous for participants.

This survey is anonymous and your identity will not be disclosed to the researcher. You may withdraw from this survey at any time up until submission of the survey. Once the surveys have been submitted, you will be unable to do withdraw individual surveys as they are anonymous, and are therefore non-identifiable. If you do decide to take part in this survey, please make sure that you complete ALL the relevant questions. It is anticipated that the survey might take about 20 minutes to complete. It is set up so that it can be done in part and continued later if that suits your time and availability.

- COMPLETION OF THIS SURVEY WILL BE TAKEN AS CONSENT TO PARTICIPATE-
Following the analysis of the responses to the questionnaire, I would seek to interview about twenty people with background and expertise in Australia and North America.

I believe that my research is significant for those working in governance in the Church. However there is very little research in the area. I have been encouraged by the responses and support of people who have been involved in the development of Public Juridic Persons and formation for leadership through the contacts that I have made so far.

The information provided in the online responses will be anonymous as it feeds into the data base and hence will be completely confidential. If you are interested in being available for interview or interested in the further development of the research, please email me at JHThornber@edmundrice.org to establish the contact.

Any questions regarding this project should be directed in the first instance to myself,

John Henry Thornber cfc 61 02 94123221 as the doctoral student undertaking the research,
    Skype: john.henry.thornber
    Email JHThornber@edmundrice.org
or to
    Professor Michael Gaffney (as Principal Supervisor)
    (02) 6209-1218
    School of Educational Leadership
    Signadou Campus 223 Antill Street Watson ACT 2602
    Email: michael.gaffney@acu.edu.au

This study has been approved by the Human Research Ethics Committee at Australian Catholic University

In the event that you have any complaint or concern about the way you have been treated during the study, or have any query that I have not been able to satisfy, you may write to the Chair of the Human Research Ethics Committee:

NSW and ACT: Chair, HREC
C/- Research Services
Australian Catholic University
Strathfield Campus
Locked Bag 2002
STRATHFIELD NSW 2135
Tel: 02 9701 4093
Fax: 02 9701 4350

Any complaint or concern will be treated in confidence and fully investigated. The participant will be informed of the outcome. If you are willing to participate in this research, you are asked to complete survey by Friday, May 28. http://apps.acu.edu.au/surveys/index.php?sid=52268&lang=en

Many thanks for taking the time to consider this request. Your contribution is very much appreciated.

Research Student

Supervisor

Appendix 5   Participant Interview Letter

John Henry Thornber
35 Anderson St
Chatswood, NSW, 2067
Telephone 61 2 94123221
Signadou Campus
223 Antill Street Watson ACT 2602
PO Box 256 Dickson ACT 2602 Australia
Telephone: **02 6209 1218**
Facsimile: **02 6209 1215**
www.acu.edu.au

INVITATION TO PARTICIPANTS

TITLE OF PROJECT: Ensuring Fertile Soil – Formation for Canonical Governance

STUDENT RESEARCHER: John Henry Thornber

PRINCIPAL SUPERVISOR: Professor Michael Gaffney

PROGRAMME IN WHICH ENROLLED: Doctor of Education

Dear On Line Participant,

I am currently undertaking studies towards a Doctor of Education degree in educational leadership at the Australian Catholic University. The area of my research is *Formation of people for canonical leadership in the Catholic Church*. The study will explore the implications of people being invited to undertake leadership in ecclesial roles of governance formerly exercised by members of religious institutes. The research is focussed on current practices in formation for the role and is designed to develop guidelines for appropriate formation into the future.

The nature of the topic is such that the participants from whom I am seeking a response in an on line survey need to have a background and understanding of 'Public Juridic Persons' as governance structures for Church ministries in health, welfare and education. While there may be some inconvenience of time, it is not envisaged that project involvement will be an onerous for participants.

This survey is anonymous and your identity will not be disclosed to the researcher. You may withdraw from this survey at any time up until submission of the survey. Once the surveys have been submitted, you will be unable to do withdraw individual surveys as they are anonymous, and are therefore non-identifiable. If you do decide to take part in this survey, please make sure that you complete ALL the relevant questions. It is anticipated that the survey might take about 20 minutes to complete. It is set up so that it can be done in part and continued later if that suits your time and availability.

- COMPLETION OF THIS SURVEY WILL BE TAKEN AS CONSENT TO PARTICIPATE-
Following the analysis of the responses to the questionnaire, I would seek to interview about twenty people with background and expertise in Australia and North America.

I believe that my research is significant for those working in governance in the Church. However there is very little research in the area. I have been encouraged by the responses and support of people who have been

involved in the development of Public Juridic Persons and formation for leadership through the contacts that I have made so far.

The information provided in the online responses will be anonymous as it feeds into the data base and hence will be completely confidential. If you are interested in being available for interview or interested in the further development of the research, please email me at <JHThornber@edmundrice.org> to establish contact.

Any questions regarding this project should be directed in the first instance to myself,

John Henry Thornber cfc 61 02 94123221 as the doctoral student undertaking the research,
       Skype: john.henry.thornber
       Email: <JHThornber@edmundrice.org>
or to
       Professor Michael Gaffney (as Principal Supervisor)
       (02) 6209-1218
       School of Educational Leadership
       Signadou Campus 223 Antill Street Watson ACT 2602
       Email: michael.gaffney@acu.edu.au

This study has been approved by the Human Research Ethics Committee at Australian Catholic University

In the event that you have any complaint or concern about the way you have been treated during the study, or have any query that I have not been able to satisfy, you may write to the Chair of the Human Research Ethics Committee:

NSW and ACT: Chair, HREC
C/- Research Services
Australian Catholic University
Strathfield Campus
Locked Bag 2002
STRATHFIELD NSW 2135
Tel: 02 9701 4093
Fax: 02 9701 4350

Any complaint or concern will be treated in confidence and fully investigated. The participant will be informed of the outcome.

If you are willing to participate in this research, you are asked to complete survey by Friday, May 28.

http://apps.acu.edu.au/surveys/index.php?sid=52268&lang=en

Many thanks for taking the time to consider this request. Your contribution is very much appreciated.

Research Student

Supervisor

Appendix 6   Interview Protocol

Interview Protocol

Project: Formation for Canonical Governance
Time of Interview:
Date:
Place:
Interviewer:
Interviewee:
Position of the Interviewee:

Description of Project

A) Purpose of the Study: Seeking the formation needs for people for Canonical Governance in the ministries of the Catholic Church.

B) Individuals and sources of data being collected
Over ninety people responded to the on-line survey which created the data for the interview. They responded from Australia, Canada, England, Ireland, Italy, New Zealand and the United States of America. They brought experience and roles as canonists, theologians, laity, leaders and members of Religious Institutes, Bishops, priests, members of juridic persons, senior managers of ministries and formators in ministry.

This data is now being reflected upon by some who offered to be interview participants and others who generously have responded to a request to participate in the interview.

C) What will be done with the data to protect the confidentiality of the interviewee
The interviews will, with permission, be recorded and transcribed. Only transcribed material will be used and identity will be protected by coding.

D) How long the interview will take
Participants have been provided with a copy of the relevant data and the proposed questions and the interview might take approximately an hour.

Consent Form

Questions:
For the purpose of this study, formation of persons for canonical governance is defined as *a reflected development on one's gifts and how they contribute to the need in hand providing an holistic preparation of a person for a role – human, spiritual, intellectual, pastoral – including reflection on the experiences of their own life which might highlight some lacks in development or knowledge that are essential for that need.*

Would you like to comment on whether this is a reasonable definition?

1) I would like to go through each of the sections of the survey with you, and get your
    impressions of the data:

    Human
    Spiritual
    Intellectual
    Pastoral
    For each of the above
            What is the data telling you?
            Why do you think this is the case?
            What if anything should be done about it? Why?
            What do you see as the implications for formation for canonical governance?

2)   Are there any other issues and points of interest that you would like to discuss about
     formation for canonical governance?

Many thanks for your insight and assistance.

CONSENT FORM
Copy for Researcher

TITLE OF PROJECT: Ensuring Fertile Soil – Formation for Canonical Governance

SUPERVISOR: Professor Michael Gaffney

CO SUPERVISOR: Dr Patrick McArdle

STUDENT RESEARCHER: John Henry Thornber

I .... *(the participant)* have read and understood the information provided in the Letter to Participants. Any questions I have asked have been answered to my satisfaction. I agree to participate in this interview of one hour and to its being audio taped, realising that I can withdraw my consent at any time without comment. I agree that research data collected for the study may be published or may be provided to other researchers in a form that does not identify me in any way.

NAME OF PARTICIPANT: ....

SIGNATURE   DATE ....

SIGNATURE OF SUPERVISOR: DATE:………………..

SIGNATURE OF STUDENT RESEARCHER: DATE:.......................…

CONSENT FORM
Copy for Participant to Keep

TITLE OF PROJECT: Ensuring Fertile Soil – Formation for Canonical Governance

SUPERVISOR: Professor Michael Gaffney

CO SUPERVISOR: Dr Patrick McArdle

STUDENT RESEARCHER: John Henry Thornber

I .... *(the participant)* have read and understood the information provided in the Letter to Participants. Any questions I have asked have been answered to my satisfaction. I agree to participate in this interview of one hour and to its being audio taped, realising that I can withdraw my consent at any time without comment. I agree that research data collected for the study may be published or may be provided to other researchers in a form that does not identify me in any way.

NAME OF PARTICIPANT: ....

SIGNATURE   DATE ....

SIGNATURE OF SUPERVISOR: DATE: ....

SIGNATURE OF STUDENT RESEARCHER: DATE: ....

Appendix 7   List of Items Provided to Interviewees for Consideration

Responses in 2 Highest Categories		Desired Traits No	Perceived Actual 43			Desired Responses		Perceived Responses
Total								
>90%	32	74.42%				Strongly Agree		Very High
80-89%	7	16.28%	1	2.33%		Agree		High
70-79%	4	9.30%	5	11.63%		Disagree		Fair
60-69%			6	13.95%		Strongly Disagree		Low
50-59%			9	20.93%		No answer		Unable to Judge
40-49%			12	27.91%				No answer
30-39%			6	13.95%				
20-29%			3	6.98%				

Human			12	
>90%	10	83.33%		
80-89%	2	16.67%	1	8.33%
70-79%	0	0.00%	3	25.00%
60-69%			2	16.67%
50-59%			3	25.00%
40-49%			1	8.33%
30-39%			2	16.67%

Spiritual			10	
>90%	7	70.00%		
80-89%	2	20.00%		
70-79%	1	10.00%		
60-69%			4	40.00%
50-59%			1	10.00%
40-49%			4	40.00%
30-39%				0.00%
20-29%			1	10.00%

Intellectual			11	
>90%	7	63.64%		
80-89%	1	9.09%		
70-79%	3	27.27%		
60-69%				
50-59%			2	18.18%
40-49%			2	18.18%
30-39%			4	36.36%
20-29%			2	18.18%

Pastoral			10	
>90%	8	80.00%		
80-89%	2	20.00%		
70-79%			2	20.00%
60-69%				
50-59%			5	50.00%
40-49%			3	30.00%

Human

3 Canonical Governors possess a deep sense of justice

Strongly Agree	63	68.48%			Very High	18	19.57%
Agree	27	29.35%	90	97.83%	High	42	45.65%
Disagree	0	0.00%			Fair	23	25.00%
Strongly Disagree	0	0.00%			Low	2	2.17%
No answer	2	2.17%			Unable to Judge	3	3.26%
					No answer	4	4.35%

4 Canonical Governors are genuinely compassionate

Strongly Agree	53	57.61%			Very High	18	19.57%
Agree	35	38.04%	88	95.65%	High	43	46.74%
Disagree	3	3.26%			Fair	18	19.57%
Strongly Disagree	0	0.00%			Low	2	2.17%
No answer	1	1.09%			Unable to Judge	6	6.52%
					No answer	5	5.43%

8 Canonical Governors respect every person

Strongly Agree	58	63.04%			Very High	13	14.13%
Agree	28	30.43%	86	93.47%	High	41	44.57%
Disagree	4	4.35%			Fair	26	28.26%
Strongly Disagree	0	0.00%			Low	4	4.35%
No answer	2	2.17%			Unable to Judge	2	2.17%
					No answer	6	6.52%

Spiritual

13 Canonical Governors understand their baptismal call to mission

Strongly Agree	65	70.65%			Very High	21	22.83%
Agree	23	25.00%	88	95.65%	High	37	40.22%
Disagree	3	3.26%			Fair	20	21.74%
Strongly Disagree	0	0.00%			Low	8	8.70%
No answer	1	1.09%			Unable to Judge	2	2.17%
					No answer	4	4.35%

14 Canonical Governors have a sense of vocation to the role

Strongly Agree	54	58.70%			Very High	18	19.57%
Agree	35	38.04%	89	96.74%	High	39	42.39%
Disagree	1	1.09%			Fair	22	23.91%
Strongly Disagree	0	0.00%			Low	7	7.61%
No answer	2	2.17%			Unable to Judge	2	2.17%
					No answer	4	4.35%

Strongly Agree	56	60.87%			Very High	16	17.39%
Agree	29	31.52%	85	92.39%	High	31	33.70%
Disagree	3	3.26%			Fair	24	26.09%
Strongly Disagree	0	0.00%			Low	6	6.52%
No answer	4	4.35%			Unable to Judge	10	10.87%
					No answer	5	5.43%

Strongly Agree	42	45.65%			Very High	9	9.78%
Agree	40	43.48%	82	89.13%	High	32	34.78%
Disagree	7	7.61%			Fair	30	32.61%
Strongly Disagree	0	0.00%			Low	9	9.78%
No answer	3	3.26%			Unable to Judge	5	5.43%
					No answer	7	7.61%

Strongly Agree	43	46.74%			Very High	11	11.96%
Agree	44	47.83%	87	94.57%	High	35	38.04%
Disagree	3	3.26%			Fair	29	31.52%
Strongly Disagree	0	0.00%			Low	4	4.35%
No answer	2	2.17%			Unable to Judge	9	9.78%
					No answer	4	4.35%

Strongly Agree	42	45.65%			Very High	15	14.29%
Agree	36	39.13%	78	84.78%	High	24	31.17%
Disagree	12	13.04%			Fair	23	29.87%
Strongly Disagree	0	0.00%			Low	12	15.58%
No answer	2	2.17%			Unable to Judge	4	5.19%
					No answer	3	3.90%

Intellectual

Strongly Agree	48	52.17%			Very High	15	16.30%
Agree	35	38.04%	83	90.21%	High	23	25.00%
Disagree	6	6.52%			Fair	27	29.35%
Strongly Disagree	1	1.09%			Low	17	18.48%
No answer	2	2.17%			Unable to Judge	5	5.43%
					No answer	5	5.43%

26 Canonical Governors need to have some background in missiology

Strongly Agree	27	29.35%			Very High	2	2.17%
Agree	44	47.83%	71	77.18%	High	24	26.09%
Disagree	15	16.30%			Fair	31	33.70%
Strongly Disagree	1	1.09%			Low	19	20.65%
No answer	5	5.43%			Unable to Judge	9	9.78%
					No answer	7	7.61%

27 Canonical Governors need to have some background in ecclesiology

Strongly Agree	37	40.22%			Very High	2	2.17%
Agree	43	46.74%	80	86.96%	High	29	31.52%
Disagree	10	10.87%			Fair	36	39.13%
Strongly Disagree	0	0.00%			Low	14	15.22%
No answer	2	2.17%			Unable to Judge	7	7.61%
					No answer	4	4.35%

Strongly Agree	42	45.65%			Very High	2	2.17%
Agree	41	44.57%	83	90.22%	High	30	32.61%
Disagree	6	6.52%			Fair	32	34.78%
Strongly Disagree	0	0.00%			Low	17	18.48%
No answer	3	3.26%			Unable to Judge	6	6.52%
					No answer	5	5.43%

Strongly Agree	35	38.04%			Very High	6	6.52%
Agree	49	53.26%	84	91.30%	High	26	28.26%
Disagree	5	5.43%			Fair	27	29.35%
Strongly Disagree	1	1.09%			Low	21	22.83%
No answer	2	2.17%			Unable to Judge	8	8.70%
					No answer	4	4.35%

Strongly Agree	28	30.43%			Very High	5	5.43%
Agree	55	59.78%	83	90.21%	High	31	33.70%
Disagree	2	2.17%			Fair	34	36.96%
Strongly Disagree	2	2.17%			Low	11	11.96%
No answer	5	5.43%			Unable to Judge	4	4.35%
					No answer	7	7.61%

Pastoral

Strongly Agree	55	59.78%			Very High	14	15.22%
Agree	32	34.78%	87	94.56%	High	33	35.87%
Disagree	1	1.09%			Fair	33	35.87%
Strongly Disagree	1	1.09%			Low	7	7.61%
No answer	3	3.26%			Unable to Judge	2	2.17%
					No answer	3	3.26%

Strongly Agree	57	61.96%			Very High	9	9.78%
Agree	28	30.43%	85	92.39%	High	37	40.22%
Disagree	2	2.17%			Fair	29	31.52%
Strongly Disagree	1	1.09%			Low	9	9.78%
No answer	4	4.35%			Unable to Judge	5	5.43%
					No answer	3	3.26%

Strongly Agree	51	55.43%			Very High	13	14.13%
Agree	34	36.96%	85	92.39%	High	29	33.77%
Disagree	5	5.43%			Fair	33	35.06%

					Low	13	15.58%
Strongly Disagree	0	0.00%					
No answer	2	2.17%			Unable to Judge	2	1.30%
					No answer	2	2.60%

Strongly Agree	47	51.09%			Very High	12	13.04%
Agree	38	41.30%	85	92.39%	High	30	32.61%
Disagree	2	2.17%			Fair	35	38.04%
Strongly Disagree	1	1.09%			Low	10	10.87%
No answer	4	4.35%			Unable to Judge	1	1.09%
					No answer	4	4.35%

Appendix 8   Differences between Demographic Groups – Independent Samples t-Test

GENDER (Male vs. Female)	Levene's test		t-test (2-tailed)					95% CI	
	F	Sig	t	df	P	Mean Diff	S.E. Diff	Lower	Upper
People of Integrity Desired	15.054	.000							
Equal variances			1.820	89	.072	.136	.075	-.013	.285
Unequal variances			1.909	72	.060	.136	.071	-.006	.278
People of Integrity Perceived	.276	.601							
Equal variances			-.253	86	.801	-.040	.160	-.359	.278
Unequal variances			-.250	78	.804	-.040	.162	-.363	.282
Balance in Judgement Desired	7.498	.007							
Equal variances			1.400	89	.165	.146	.104	-.061	.354
Unequal variances			1.421	89	.159	.146	.103	-.058	.351
Balance in Judgement Perceived	1.693	.197							
Equal variances			-.682	86	.497	-.112	.164	-.439	.214
Unequal variances			-.688	86	.493	-.112	.163	-.436	.212
Deep Sense of Justice Desired	19.096	.000							
Equal variances			2.152	88	.034	.205	.095	.016	.395
Unequal variances			2.183	87	.032	.205	.094	.018	.392
Deep Sense of Justice Perceived	2.054	.155							
Equal variances			-1.028	86	.307	-.200	.195	-.587	.187
Unequal variances			-1.040	86	.301	-.200	.193	-.583	.183
Genuinely Compassionate Desired	.849	.359							
Equal variances			.716	89	.476	.085	.119	-.151	.321
Unequal variances			.720	88	.473	.085	.118	-.150	.320
Genuinely Compassionate Perceived	.035	.852							
Equal variances			-.852	85	.396	-.190	.223	-.635	.254
Unequal variances			-.845	79	.401	-.190	.225	-.639	.258
Concern for Others Desired	.765	.384							
Equal variances			.961	88	.339	.104	.108	-.111	.320
Unequal variances			.958	85	.341	.104	.109	-.112	.320
Concern for Others Perceived	1.827	.180							
Equal variances			-.662	85	.510	-.092	.139	-.369	.185
Unequal variances			-.655	79	.514	-.092	.141	-.373	.188
Personal Maturity Desired	.041	.841							
Equal variances			-.065	89	.948	-.007	.105	-.215	.201
Unequal variances			-.065	88	.948	-.007	.104	-.214	.200
Personal Maturity Perceived	.010	.920							
Equal variances			-.817	86	.416	-.127	.156	-.437	.182
Unequal variances			-.820	86	.414	-.127	.155	-.435	.181
Demonstrate Self-knowledge Desired	2.663	.106							
Equal variances			1.682	87	.096	.207	.123	-.038	.451
Unequal variances			1.713	87	.090	.207	.121	-.033	.447
Demonstrate Self-knowledge Perceived	.215	.644							
Equal variances			-.754	83	.453	-.175	.232	-.636	.286
Unequal variances			-.757	83	.451	-.175	.231	-.635	.285
Respect Every Person Desired	10.395	.002							
Equal variances			2.412	88	.018	.287	.119	.050	.523
Unequal variances			2.461	88	.016	.287	.116	.055	.518
Respect Every Person Perceived	.527	.470							
Equal variances			-.308	84	.759	-.058	.190	-.436	.319
Unequal variances			-.305	78	.761	-.058	.191	-.439	.322
Aware of their Gifts Desired	1.721	.193							
Equal variances			-.299	88	.765	-.036	.119	-.273	.201
Unequal variances			-.302	88	.763	-.036	.118	-.271	.199

			t	df	Sig.	Mean Diff	Std Error	Lower	Upper
Aware of their Gifts Perceived	.005	.944							
Equal variances			.257	84	.798	.053	.207	-.359	.466
Unequal variances			.257	82	.798	.053	.207	-.359	.466
Learn from Praise Desired	.155	.695							
Equal variances			-.025	86	.980	-.003	.126	-.254	.248
Unequal variances			-.025	82	.980	-.003	.127	-.255	.249
Learn from Praise Perceived	.292	.590							
Equal variances			.344	83	.732	.083	.242	-.398	.565
Unequal variances			.343	81	.732	.083	.243	-.399	.566
Balance in Behaviour Desired	.032	.859							
Equal variances			-.680	86	.498	-.076	.111	-.296	.145
Unequal variances			-.678	84	.500	-.076	.111	-.297	.146
Balance in behaviour Perceived	5.092	.027							
Equal variances			-.888	83	.377	-.135	.152	-.437	.167
Unequal variances			-.916	80	.363	-.135	.147	-.428	.158
Learn from Criticism Desired	1.154	.286							
Equal variances			.705	86	.483	.086	.122	-.157	.329
Unequal variances			.697	79	.488	.086	.124	-.160	.332
Learn from Criticism Perceived	.002	.965							
Equal variances			-.307	83	.760	-.064	.208	-.478	.350
Unequal variances			-.307	82	.760	-.064	.208	-.478	.350
Understand Baptismal Call Desired	5.178	.025							
Equal variances			1.336	89	.185	.150	.112	-.073	.372
Unequal variances			1.353	89	.179	.150	.111	-.070	.369
Understand Baptismal Call Perceived	.988	.323							
Equal variances			-.596	86	.553	-.127	.213	-.551	.297
Unequal variances			-.591	80	.556	-.127	.215	-.556	.301
Sense of Vocation Desired	7.535	.007							
Equal variances			1.764	88	.081	.190	.108	-.024	.405
Unequal variances			1.783	88	.078	.190	.107	-.022	.403
Sense of Vocation Perceived	.978	.325							
Equal variances			-.486	86	.628	-.100	.205	-.507	.308
Unequal variances			-.481	79	.632	-.100	.207	-.512	.313
Open to Transcendent Desired	.780	.380							
Equal variances			.498	86	.619	.060	.120	-.178	.298
Unequal variances			.501	86	.618	.060	.119	-.177	.296
Open to Transcendent Perceived	.415	.521							
Equal variances			-.810	85	.420	-.210	.260	-.727	.306
Unequal variances			-.808	82	.422	-.210	.261	-.729	.308
See Ministry of Governance Desired	2.007	.160							
Equal variances			.855	89	.395	.099	.115	-.131	.328
Unequal variances			.862	89	.391	.099	.114	-.129	.326
See Ministry of Governance Perceived	1.777	.186							
Equal variances			.112	87	.911	.021	.191	-.359	.401
Unequal variances			.110	78	.913	.021	.194	-.365	.408
United to Word of God Desired	.007	.933							
Equal variances			.090	87	.928	.012	.136	-.257	.282
Unequal variances			.090	84	.928	.012	.135	-.257	.282
United to Word of God Perceived	.101	.752							
Equal variances			-1.249	83	.215	-.274	.219	-.710	.162
Unequal variances			-1.251	81	.215	-.274	.219	-.709	.162
Committed to Mission of Church Desired	.344	.559							
Equal variances			-.232	89	.817	-.027	.117	-.260	.206
Unequal variances			-.229	80	.820	-.027	.119	-.264	.210

	F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	Lower	Upper
Committed to Mission of Church Perceived	.748	.389							
Equal variances			-.687	86	.494	-.134	.195	-.521	.254
Unequal variances			-.694	86	.489	-.134	.193	-.517	.250
Growth in Love Desired	.000	.986							
Equal variances			1.255	88	.213	.149	.119	-.087	.384
Unequal variances			1.257	87	.212	.149	.118	-.086	.384
Growth in Love Perceived	.822	.367							
Equal variances			-1.108	86	.271	-.260	.235	-.726	.206
Unequal variances			-1.100	81	.275	-.260	.236	-.730	.210
Bridge for People to Christ Desired	1.084	.301							
Equal variances			.413	84	.681	.068	.165	-.260	.397
Unequal variances			.418	84	.677	.068	.163	-.256	.393
Bridge for People to Christ Perceived	2.483	.119							
Equal variances			-1.234	82	.221	-.251	.204	-.657	.154
Unequal variances			-1.246	82	.216	-.251	.202	-.652	.150
Identification with Ecclesial Community Desired	.637	.427							
Equal variances			.399	88	.691	.060	.150	-.237	.357
Unequal variances			.397	83	.692	.060	.150	-.240	.359
Identification with Ecclesial Community Perceived	.104	.747							
Equal variances			-1.166	86	.247	-.266	.228	-.720	.188
Unequal variances			-1.162	83	.248	-.266	.229	-.722	.189
Practices of Prayer and Spirituality Desired	7.563	.007							
Equal variances			1.511	87	.134	.193	.128	-.061	.447
Unequal variances			1.548	85	.125	.193	.125	-.055	.441
Practices of Prayer and Spirituality Perceived	.595	.443							
Equal variances			-1.422	84	.159	-.334	.235	-.800	.133
Unequal variances			-1.410	79	.162	-.334	.237	-.805	.137
Faith Rooted in God's Revelation Desired	.231	.632							
Equal variances			.628	89	.532	.075	.119	-.162	.312
Unequal variances			.630	88	.530	.075	.119	-.161	.311
Faith Rooted in God's Revelation Perceived	.649	.423							
Equal variances			.096	86	.924	.021	.217	-.410	.451
Unequal variances			.097	86	.923	.021	.214	-.404	.446
Faith Embodied in Living Tradition Desired	.633	.428							
Equal variances			-.050	88	.960	-.006	.120	-.245	.233
Unequal variances			-.049	82	.961	-.006	.121	-.247	.235
Faith Embodied in Living Tradition Perceived	.003	.959							
Equal variances			.061	86	.952	.013	.206	-.397	.422
Unequal variances			.061	83	.952	.013	.206	-.397	.422
Journey to Theological Reflection Desired	.177	.675							
Equal variances			1.192	88	.236	.169	.142	-.113	.451
Unequal variances			1.191	85	.237	.169	.142	-.113	.452
Journey to Theological Reflection Perceived	.448	.505							
Equal variances			-2.122	85	.037	-.511	.241	-.990	-.032
Unequal variances			-2.119	82	.037	-.511	.241	-.991	-.031
Some Background in Missiology Desired	.350	.556							
Equal variances			.714	85	.477	.111	.156	-.199	.421
Unequal variances			.715	84	.476	.111	.155	-.198	.420
Some Background in Missiology Perceived	1.158	.285							
Equal variances			.400	83	.690	.089	.221	-.352	.529
Unequal variances			.393	72	.696	.089	.226	-.361	.538

	F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	Lower	Upper
Some Background in Ecclesiology Desired	.061	.806							
Equal variances			.223	88	.824	.031	.141	-.248	.311
Unequal variances			.224	86	.823	.031	.140	-.247	.310
Some Background in Ecclesiology Perceived	.005	.946							
Equal variances			.061	86	.951	.013	.205	-.395	.420
Unequal variances			.061	81	.952	.013	.206	-.397	.422
Some Background in Canon Law Desired	1.471	.228							
Equal variances			1.060	88	.292	.158	.149	-.139	.455
Unequal variances			1.055	84	.295	.158	.150	-.140	.457
Some Background in Canon Law Perceived	1.275	.262							
Equal variances			.348	86	.729	.067	.191	-.314	.447
Unequal variances			.343	77	.733	.067	.194	-.321	.454
Articulate Missiology for Ministry Desired	.012	.914							
Equal variances			1.181	87	.241	.154	.131	-.105	.414
Unequal variances			1.186	86	.239	.154	.130	-.104	.413
Articulate Missiology for Ministry Perceived	.064	.801							
Equal variances			-.605	85	.547	-.125	.207	-.536	.286
Unequal variances			-.602	81	.549	-.125	.208	-.538	.288
Understand needs in Light of Scripture and Tradition Desired	2.987	.087							
Equal variances			.082	88	.935	.011	.134	-.255	.277
Unequal variances			.080	74	.937	.011	.137	-.263	.285
Understand Needs in Light of Scripture and Tradition Perceived	.453	.503							
Equal variances			-.889	86	.376	-.207	.233	-.670	.256
Unequal variances			-.884	82	.380	-.207	.234	-.673	.259
Knowledge of Catholic Social Teaching Desired	.966	.328							
Equal variances			1.325	88	.188	.179	.135	-.089	.446
Unequal variances			1.338	88	.184	.179	.133	-.087	.444
Knowledge of Catholic Social Teaching Perceived	.677	.413							
Equal variances			-1.530	86	.130	-.291	.190	-.668	.087
Unequal variances			-1.517	81	.133	-.291	.192	-.672	.091
Catechism of Catholic Church Desired	.604	.439							
Equal variances			-.517	84	.607	-.063	.122	-.306	.180
Unequal variances			-.515	81	.608	-.063	.122	-.307	.181
Knowledge of Catholic Catechism Perceived	.576	.450							
Equal variances			-.305	84	.761	-.068	.225	-.516	.379
Unequal variances			-.306	84	.760	-.068	.224	-.513	.376
Appreciation of Faith through Intellectual Formation Desired	1.414	.238							
Equal variances			-.389	85	.699	-.052	.133	-.316	.212
Unequal variances			-.392	84	.696	-.052	.132	-.313	.210
Appreciation of Faith through Intellectual Formation Perceived	3.182	.078							
Equal variances			.315	83	.753	.064	.203	-.339	.467
Unequal variances			.319	82	.751	.064	.200	-.335	.462
Understand the Ministry Desired	3.210	.077							
Equal variances			-.851	89	.397	-.082	.096	-.272	.109
Unequal variances			-.837	78	.405	-.082	.098	-.276	.113
Understand the Ministry Perceived	.909	.343							
Equal variances			-.186	88	.853	-.030	.160	-.348	.289
Unequal variances			-.185	85	.854	-.030	.161	-.350	.290

	F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	Lower	Upper
Understand Responsibility for Catholic Identity Desired	4.964	.028							
Equal variances			-1.151	88	.253	-.125	.109	-.341	.091
Unequal variances			-1.122	70	.266	-.125	.111	-.347	.097
Understand the Responsibility for Catholic Identity Perceived	2.309	.132							
Equal variances			-.548	88	.585	-.098	.179	-.455	.258
Unequal variances			-.540	79	.591	-.098	.182	-.460	.264
Discern Signs of Times for Mission Desired	.522	.472							
Equal variances			-.348	87	.728	-.043	.124	-.290	.203
Unequal variances			-.344	79	.732	-.043	.126	-.293	.207
Discern Signs of Times for Mission Perceived	.544	.463							
Equal variances			-.677	87	.500	-.134	.198	-.528	.260
Unequal variances			-.682	87	.497	-.134	.197	-.525	.257
Call Leaders to Account Appropriately Desired	.003	.955							
Equal variances			.183	86	.856	.024	.129	-.233	.280
Unequal variances			.181	78	.857	.024	.130	-.236	.283
Call Leaders to Account Appropriately Perceived	.516	.474							
Equal variances			.336	87	.737	.072	.213	-.352	.495
Unequal variances			.333	81	.740	.072	.215	-.356	.500
Understand Responsibilities of Bishop for Coordination Desired	.063	.802							
Equal variances			.015	88	.988	.002	.129	-.254	.258
Unequal variances			.016	86	.988	.002	.128	-.253	.257
Understand Responsibilities of Bishop for Coordination Perceived	.311	.578							
Equal variances			-.916	88	.362	-.190	.208	-.603	.223
Unequal variances			-.921	88	.359	-.190	.207	-.601	.220
Forming Future Governors Desired	.128	.722							
Equal variances			1.793	85	.077	.238	.133	-.026	.503
Unequal variances			1.786	82	.078	.238	.133	-.027	.504
Forming Future Governors Perceived	.000	.998							
Equal variances			-1.686	84	.096	-.379	.225	-.827	.068
Unequal variances			-1.687	83	.095	-.379	.225	-.827	.068
Understand Organisational Systems and Dynamics Desired	.258	.613							
Equal variances			.841	87	.403	.116	.138	-.158	.390
Unequal variances			.853	87	.396	.116	.136	-.154	.386
Understand Organisational Systems and Dynamics Perceived	2.149	.146							
Equal variances			1.331	87	.187	.265	.199	-.131	.661
Unequal variances			1.310	75	.194	.265	.202	-.138	.668
Responsibility for Spiritual Life of Ministry Desired	3.602	.061							
Equal variances			-.534	86	.595	-.069	.130	-.328	.189
Unequal variances			-.526	74	.601	-.069	.132	-.332	.193
Responsibility for Spiritual Life of Ministry Perceived	.299	.586							
Equal variances			-1.165	86	.247	-.226	.194	-.611	.159
Unequal variances			-1.171	86	.245	-.226	.193	-.609	.158
Inspire Common Purpose Desired	.010	.920							
Equal variances			.289	87	.773	.040	.137	-.232	.311
Unequal variances			.288	84	.774	.040	.137	-.233	.312

Inspire Common Purpose Perceived	.041	.839						
Equal variances			-1.555	86	.124	-.299	.192	-.682	.083
Unequal variances			-1.559	86	.123	-.299	.192	-.681	.082
Selecting Future Governors Desired	.009	.923						
Equal variances			2.141	83	.035	.311	.145	.022	.600
Unequal variances			2.119	77	.037	.311	.147	.019	.603
Selecting Future Governors Perceived	.046	.831						
Equal variances			-2.132	83	.036	-.483	.227	-.934	-.033
Unequal variances			-2.129	81	.036	-.483	.227	-.935	-.032

LAY vs. RELIGIOUS	Levene's test		t-test (2-tailed)						
	F	Sig	t	df	P	Mean Diff	S.E. Diff	95% CI Lower	Upper
People of Integrity Desired	1.951	.166							
Equal variances			.676	87	.501	.055	.081	-.107	.217
Unequal variances			.777	70	.440	.055	.071	-.086	.196
People of Integrity Perceived	.000	.988							
Equal variances			.400	84	.690	.071	.179	-.284	.427
Unequal variances			.409	47	.684	.071	.175	-.280	.423
Balance in Judgement Desired	1.289	.259							
Equal variances			.507	87	.613	.059	.115	-.171	.288
Unequal variances			.528	55	.600	.059	.111	-.164	.281
Balance in Judgement Perceived	6.745	.011							
Equal variances			2.309	84	.023	.414	.179	.058	.771
Unequal variances			2.039	35	.049	.414	.203	.002	.827
Deep Sense of Justice Desired	12.224	.001							
Equal variances			1.511	86	.135	.159	.105	-.050	.368
Unequal variances			1.626	60	.109	.159	.098	-.037	.355
Deep Sense of Justice Perceived	1.508	.223							
Equal variances			1.314	84	.192	.285	.217	-.146	.717
Unequal variances			1.243	40	.221	.285	.229	-.178	.749
Genuinely Compassionate Desired	.002	.960							
Equal variances			.055	87	.956	.007	.131	-.253	.267
Unequal variances			.054	48	.957	.007	.132	-.258	.273
Genuinely Compassionate Perceived	.306	.582							
Equal variances			.641	83	.524	.160	.250	-.337	.657
Unequal variances			.618	42	.540	.160	.259	-.362	.682
Concern for Others Desired	.002	.960							
Equal variances			.474	86	.636	.057	.120	-.182	.296
Unequal variances			.450	42	.655	.057	.127	-.199	.313
Concern for Others Perceived	1.004	.319							
Equal variances			.105	83	.917	.016	.156	-.295	.328
Unequal variances			.111	48	.912	.016	.148	-.281	.314
Personal Maturity Desired	4.226	.043							
Equal variances			.971	87	.334	.112	.115	-.117	.340
Unequal variances			1.031	57	.307	.112	.108	-.105	.329
Personal Maturity Perceived	12.179	.001							
Equal variances			1.139	84	.258	.196	.172	-.146	.538
Unequal variances			.923	31	.363	.196	.213	-.237	.630
Demonstrate Self-knowledge Desired	1.927	.169							
Equal variances			1.343	85	.183	.183	.137	-.088	.455
Unequal variances			1.454	57	.151	.183	.126	-.069	.436
Demonstrate Self-knowledge Perceived	.000	.993							
Equal variances			-.078	81	.938	-.020	.262	-.541	.500
Unequal variances			-.080	45	.937	-.020	.256	-.536	.495
Respect Every Person Desired	2.625	.109							
Equal variances			1.096	86	.276	.146	.133	-.119	.412
Unequal variances			1.135	54	.261	.146	.129	-.112	.405
Respect Every Person Perceived	8.304	.005							
Equal variances			2.104	82	.038	.431	.205	.023	.838
Unequal variances			1.775	33	.085	.431	.243	-.063	.924
Aware of their Gifts Desired	.634	.428							
Equal variances			.038	86	.970	.005	.132	-.257	.267
Unequal variances			.040	53	.969	.005	.125	-.246	.256

	F	Sig.	t	df	Sig. (2-tailed)	Mean Diff	Std. Error Diff	Lower	Upper
Aware of their Gifts Perceived	2.245	.138							
Equal variances			1.265	83	.209	.291	.230	-.167	.749
Unequal variances			1.146	35	.260	.291	.254	-.225	.807
Learn from Praise Desired	1.220	.273							
Equal variances			.246	84	.806	.033	.135	-.236	.303
Unequal variances			.209	34	.836	.033	.160	-.291	.358
Learn from Praise Perceived	7.130	.009							
Equal variances			1.593	81	.115	.429	.269	-.107	.964
Unequal variances			1.406	34	.169	.429	.305	-.191	1.049
Balance in Behaviour Desired	4.000	.049							
Equal variances			1.013	85	.314	.123	.121	-.118	.364
Unequal variances			.943	41	.351	.123	.130	-.140	.386
Balance in behaviour Perceived	1.975	.164							
Equal variances			.861	81	.392	.145	.169	-.191	.482
Unequal variances			.806	37	.425	.145	.180	-.220	.511
Learn from Criticism Desired	.005	.946							
Equal variances			-.638	84	.525	-.086	.135	-.354	.182
Unequal variances			-.591	40	.558	-.086	.145	-.380	.208
Learn from Criticism Perceived	.248	.620							
Equal variances			.870	81	.387	.203	.234	-.262	.669
Unequal variances			.888	45	.379	.203	.229	-.258	.665
Understand Baptismal Call Desired	2.262	.136							
Equal variances			.642	87	.523	.079	.124	-.167	.325
Unequal variances			.707	63	.482	.079	.112	-.145	.304
Understand Baptismal Call Perceived	.009	.925							
Equal variances			.044	84	.965	.010	.239	-.466	.487
Unequal variances			.044	44	.965	.010	.240	-.473	.494
Sense of Vocation Desired	1.140	.289							
Equal variances			.465	86	.643	.056	.120	-.183	.295
Unequal variances			.479	54	.634	.056	.117	-.178	.290
Sense of Vocation Perceived	.142	.707							
Equal variances			.322	84	.748	.074	.230	-.383	.531
Unequal variances			.336	49	.738	.074	.220	-.369	.517
Open to Transcendent Desired	1.437	.234							
Equal variances			-.225	85	.823	-.030	.132	-.292	.232
Unequal variances			-.207	40	.837	-.030	.143	-.319	.259
Open to Transcendent Perceived	.184	.669							
Equal variances			1.222	83	.225	.358	.293	-.224	.940
Unequal variances			1.167	39	.250	.358	.307	-.262	.978
See Ministry of Governance Desired	5.687	.019							
Equal variances			1.140	87	.257	.144	.126	-.107	.395
Unequal variances			1.267	64	.210	.144	.114	-.083	.371
See Ministry of Governance Perceived	.823	.367							
Equal variances			.220	85	.827	.047	.214	-.379	.473
Unequal variances			.236	52	.815	.047	.200	-.354	.448
United to Word of God Desired	.125	.725							
Equal variances			1.488	86	.140	.211	.142	-.071	.494
Unequal variances			1.453	47	.153	.211	.145	-.081	.504
United to Word of God Perceived	.566	.454							
Equal variances			.597	82	.552	.149	.249	-.347	.645
Unequal variances			.556	35	.582	.149	.268	-.395	.693
Committed to Mission of Church Desired	1.450	.232							
Equal variances			-.493	87	.623	-.064	.130	-.321	.194
Unequal variances			-.436	38	.666	-.064	.147	-.361	.233

	F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	Lower	Upper
Committed to Mission of Church Perceived	.292	.590							
Equal variances			.793	84	.430	.173	.219	-.261	.608
Unequal variances			.773	40	.444	.173	.224	-.280	.627
Growth in Love Desired	2.077	.153							
Equal variances			1.026	86	.308	.135	.132	-.127	.397
Unequal variances			.943	40	.351	.135	.143	-.155	.425
Growth in Love Perceived	2.362	.128							
Equal variances			1.132	84	.261	.301	.266	-.228	.830
Unequal variances			.997	33	.326	.301	.302	-.313	.915
Bridge for People to Christ Desired	3.027	.086							
Equal variances			.096	83	.923	.017	.179	-.339	.373
Unequal variances			.087	40	.931	.017	.199	-.384	.419
Bridge for People to Christ Perceived	2.040	.157							
Equal variances			.765	81	.447	.174	.228	-.279	.628
Unequal variances			.728	39	.471	.174	.240	-.310	.659
Identification with Ecclesial Community Desired	.269	.605							
Equal variances			1.271	86	.207	.203	.160	-.114	.520
Unequal variances			1.321	55	.192	.203	.154	-.105	.510
Identification with Ecclesial Community Perceived	.734	.394							
Equal variances			-1.204	84	.232	-.312	.259	-.827	.203
Unequal variances			-1.286	48	.205	-.312	.242	-.799	.176
Practices of Prayer and Spirituality Desired	1.696	.196							
Equal variances			1.281	85	.204	.180	.140	-.099	.459
Unequal variances			1.329	55	.189	.180	.135	-.091	.451
Practices of Prayer and Spirituality Perceived	.025	.875							
Equal variances			.565	83	.574	.148	.263	-.374	.670
Unequal variances			.549	40	.586	.148	.270	-.398	.694
Faith Rooted in God's Revelation Desired	.014	.905							
Equal variances			-.018	87	.986	-.002	.131	-.263	.259
Unequal variances			-.018	48	.986	-.002	.133	-.269	.264
Faith Rooted in God's Revelation Perceived	1.118	.293							
Equal variances			-.116	84	.908	-.028	.242	-.510	.454
Unequal variances			-.107	38	.915	-.028	.262	-.559	.503
Faith Embodied in Living Tradition Desired	2.205	.141							
Equal variances			-.301	87	.764	-.039	.131	-.300	.221
Unequal variances			-.280	43	.781	-.039	.141	-.323	.245
Faith Embodied in Living Tradition Perceived	.048	.828							
Equal variances			-.296	85	.768	-.068	.229	-.523	.388
Unequal variances			-.290	43	.773	-.068	.234	-.539	.404
Journey to Theological Reflection Desired	.214	.645							
Equal variances			-.046	87	.964	-.007	.156	-.318	.304
Unequal variances			-.043	43	.966	-.007	.166	-.342	.328
Journey to Theological Reflection Perceived	1.007	.318							
Equal variances			.320	84	.749	.088	.274	-.457	.633
Unequal variances			.303	40	.764	.088	.290	-.499	.675
Some Background in Missiology Desired	.888	.349							
Equal variances			-.106	84	.916	-.018	.169	-.354	.318
Unequal variances			-.112	54	.911	-.018	.160	-.339	.303
Some Background in Missiology Perceived	.125	.724							
Equal variances			.574	82	.568	.142	.247	-.349	.633
Unequal variances			.560	40	.578	.142	.253	-.369	.652

	F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	Lower	Upper
Some Background in Ecclesiology Desired	.145	.704							
Equal variances			-.528	87	.599	-.079	.151	-.379	.220
Unequal variances			-.526	49	.601	-.079	.151	-.383	.224
Some Background in Ecclesiology Perceived	1.506	.223							
Equal variances			-.139	85	.890	-.032	.228	-.485	.422
Unequal variances			-.158	60	.875	-.032	.201	-.433	.370
Some Background in Canon Law Desired	.810	.371							
Equal variances			-.638	87	.525	-.103	.162	-.425	.218
Unequal variances			-.599	43	.552	-.103	.172	-.451	.244
Some Background in Canon Law Perceived	1.739	.191							
Equal variances			-1.568	85	.121	-.330	.210	-.748	.088
Unequal variances			-1.628	48	.110	-.330	.203	-.737	.078
Articulate Missiology for Ministry Desired	.548	.461							
Equal variances			2.013	85	.047	.288	.143	.004	.571
Unequal variances			2.089	51	.042	.288	.138	.011	.564
Articulate Missiology for Ministry Perceived	.041	.840							
Equal variances			-.413	83	.680	-.098	.238	-.571	.374
Unequal variances			-.403	37	.690	-.098	.244	-.592	.396
Understand needs in Light of Scripture and Tradition Desired	.349	.556							
Equal variances			-.214	86	.831	-.032	.148	-.325	.262
Unequal variances			-.199	42	.844	-.032	.159	-.352	.289
Understand Needs in Light of Scripture and Tradition Perceived	.720	.398							
Equal variances			.340	84	.735	.090	.265	-.436	.616
Unequal variances			.323	38	.749	.090	.279	-.475	.655
Knowledge of Catholic Social Teaching Desired	.469	.495							
Equal variances			.635	86	.527	.093	.147	-.198	.384
Unequal variances			.665	52	.509	.093	.140	-.188	.374
Knowledge of Catholic Social Teaching Perceived	1.478	.227							
Equal variances			.425	84	.672	.093	.218	-.341	.526
Unequal variances			.385	35	.702	.093	.241	-.396	.581
Catechism of Catholic Church Desired	.926	.339							
Equal variances			.424	82	.673	.056	.131	-.205	.316
Unequal variances			.386	37	.702	.056	.144	-.236	.347
Knowledge of Catholic Catechism Perceived	.009	.925							
Equal variances			.330	82	.743	.083	.253	-.420	.586
Unequal variances			.320	40	.751	.083	.261	-.444	.610
Appreciation of Faith through Intellectual Formation Desired	3.259	.075							
Equal variances			.601	83	.550	.087	.145	-.202	.377
Unequal variances			.540	38	.592	.087	.162	-.240	.415
Appreciation of Faith through Intellectual Formation Perceived	2.087	.152							
Equal variances			1.319	81	.191	.297	.225	-.151	.746
Unequal variances			1.171	34	.250	.297	.254	-.219	.813
Understand the Ministry Desired	3.212	.077							
Equal variances			-.828	87	.410	-.087	.105	-.295	.121
Unequal variances			-.743	40	.462	-.087	.117	-.322	.149
Understand the Ministry Perceived	1.021	.315							
Equal variances			-.162	86	.871	-.029	.176	-.378	.321
Unequal variances			-.151	41	.881	-.029	.189	-.410	.353

			t	df	Sig.	Mean Diff.	Std. Error	Lower	Upper
Understand Responsibility for Catholic Identity Desired	7.729	.007							
Equal variances			-1.466	86	.146	-.175	.119	-.412	.062
Unequal variances			-1.195	33	.241	-.175	.146	-.473	.123
Understand the Responsibility for Catholic Identity Perceived	.419	.519							
Equal variances			.956	86	.342	.190	.198	-.205	.584
Unequal variances			.992	51	.326	.190	.191	-.194	.574
Discern Signs of Times for Mission Desired	1.354	.248							
Equal variances			-.377	85	.707	-.052	.137	-.325	.221
Unequal variances			-.335	37	.739	-.052	.154	-.364	.260
Discern Signs of Times for Mission Perceived	.012	.915							
Equal variances			.202	85	.840	.045	.220	-.393	.482
Unequal variances			.198	43	.844	.045	.225	-.409	.498
Call Leaders to Account Appropriately Desired	4.605	.035							
Equal variances			-1.166	84	.247	-.163	.139	-.440	.115
Unequal variances			-1.017	38	.315	-.163	.160	-.486	.161
Call Leaders to Account Appropriately Perceived	2.592	.111							
Equal variances			-.357	85	.722	-.084	.237	-.555	.386
Unequal variances			-.326	39	.746	-.084	.259	-.609	.440
Understand Responsibilities of Bishop for Coordination Desired	1.682	.198							
Equal variances			1.221	86	.226	.171	.140	-.107	.448
Unequal variances			1.267	55	.211	.171	.135	-.099	.441
Understand Responsibilities of Bishop for Coordination Perceived	.103	.749							
Equal variances			-.016	86	.987	-.004	.227	-.456	.448
Unequal variances			-.016	46	.987	-.004	.229	-.465	.458
Forming Future Governors Desired	.147	.702							
Equal variances			.285	83	.776	.042	.149	-.253	.338
Unequal variances			.267	41	.791	.042	.159	-.279	.363
Forming Future Governors Perceived	.625	.431							
Equal variances			-.107	82	.915	-.027	.252	-.529	.475
Unequal variances			-.104	42	.918	-.027	.261	-.554	.499
Understand Organisational Systems and Dynamics Desired	1.208	.275							
Equal variances			1.082	86	.282	.162	.149	-.135	.458
Unequal variances			1.228	68	.224	.162	.132	-.101	.424
Understand Organisational Systems and Dynamics Perceived	.000	.986							
Equal variances			-.260	85	.796	-.057	.221	-.496	.382
Unequal variances			-.259	47	.797	-.057	.222	-.503	.388
Responsibility for Spiritual Life of Ministry Desired	2.580	.112							
Equal variances			.361	85	.719	.052	.145	-.235	.340
Unequal variances			.310	34	.758	.052	.168	-.290	.394
Responsibility for Spiritual Life of Ministry Perceived	10.429	.002							
Equal variances			-.056	85	.955	-.012	.218	-.445	.420
Unequal variances			-.047	33	.963	-.012	.259	-.539	.514
Inspire Common Purpose Desired	.157	.693							
Equal variances			-.428	86	.669	-.065	.151	-.364	.235
Unequal variances			-.405	42	.688	-.065	.159	-.386	.257
Inspire Common Purpose Perceived	.635	.428							
Equal variances			.834	85	.407	.181	.217	-.250	.611
Unequal variances			.890	51	.378	.181	.203	-.227	.588

Selecting Future Governors Desired	1.637	.204						
Equal variances			.343	82	.732	.056	.164	-.270	.382
Unequal variances			.307	36	.761	.056	.183	-.316	.428
Selecting Future Governors Perceived	4.100	.046						
Equal variances			.653	82	.516	.165	.253	-.339	.670
Unequal variances			.579	36	.566	.165	.286	-.414	.745

COUNTRY OF RESPONDENT (AUS vs. USA)	Levene's test		t-test (2-tailed)						
	F	Sig	t	Df	P	Mean Diff	S.E. Diff	95% CI Lower	Upper
People of Integrity Desired	2.992	.088							
Equal variances			.868	78	.388	.055	.063	-.070	.179
Unequal variances			.785	40.478	.437	.055	.069	-.086	.195
People of Integrity Perceived	.948	.333							
Equal variances			.763	76	.448	.135	.176	-.217	.486
Unequal variances			.849	66.142	.399	.135	.159	-.182	.451
Balance in Judgement Desired	.010	.919							
Equal variances			-.051	78	.959	-.006	.110	-.224	.213
Unequal variances			-.051	52.248	.960	-.006	.110	-.226	.215
Balance in Judgement Perceived	3.102	.082							
Equal variances			.664	76	.508	.115	.174	-.231	.461
Unequal variances			.666	50.387	.509	.115	.173	-.233	.463
Deep Sense of Justice Desired	.307	.581							
Equal variances			-.271	77	.787	-.029	.108	-.244	.185
Unequal variances			-.273	53.895	.786	-.029	.107	-.243	.185
Deep Sense of Justice Perceived	9.626	.003							
Equal variances			.683	76	.497	.154	.225	-.295	.603
Unequal variances			.819	75.198	.415	.154	.188	-.220	.528
Genuinely Compassionate Desired	3.351	.071							
Equal variances			.845	78	.401	.104	.123	-.141	.349
Unequal variances			.799	45.311	.428	.104	.130	-.158	.366
Genuinely Compassionate Perceived	.928	.338							
Equal variances			.281	75	.780	.071	.252	-.432	.573
Unequal variances			.266	41.606	.792	.071	.266	-.466	.608
Concern for Others Desired	.324	.571							
Equal variances			-.057	78	.954	-.007	.122	-.250	.236
Unequal variances			-.055	46.298	.957	-.007	.128	-.264	.250
Concern for Others Perceived	.052	.820							
Equal variances			1.209	76	.230	.192	.159	-.124	.509
Unequal variances			1.256	55.398	.215	.192	.153	-.115	.499
Personal Maturity Desired	6.388	.014							
Equal variances			1.499	78	.138	.162	.108	-.053	.378
Unequal variances			1.430	46.351	.159	.162	.113	-.066	.390
Personal Maturity Perceived	7.891	.006							
Equal variances			1.412	76	.162	.250	.177	-.103	.603
Unequal variances			1.591	68.091	.116	.250	.157	-.063	.563
Demonstrate Self-knowledge Desired	.637	.427							
Equal variances			.301	76	.764	.038	.128	-.216	.293
Unequal variances			.308	53.113	.759	.038	.125	-.212	.289
Demonstrate Self-knowledge Perceived	.563	.455							
Equal variances			.153	73	.879	.040	.262	-.482	.562
Unequal variances			.159	53.300	.875	.040	.252	-.466	.546
Respect Every Person Desired	2.093	.152							
Equal variances			-1.000	77	.320	-.125	.125	-.375	.124
Unequal variances			-1.003	53.110	.321	-.125	.125	-.376	.125

	F	Sig.	t	df	Sig. (2-tailed)	Mean Diff.	Std. Error Diff.	Lower	Upper
Respect Every Person Perceived	.114	.737							
Equal variances			.505	74	.615	.112	.222	-.330	.555
Unequal variances			.498	45.948	.621	.112	.225	-.342	.566
Aware of their Gifts Desired	.451	.504							
Equal variances			-.213	77	.832	-.028	.134	-.294	.237
Unequal variances			-.208	49.019	.836	-.028	.137	-.304	.247
Aware of their Gifts Perceived	1.407	.239							
Equal variances			-.161	74	.873	-.037	.230	-.495	.421
Unequal variances			-.149	41.318	.882	-.037	.248	-.538	.464
Learn from Praise Desired	.217	.643							
Equal variances			.980	76	.330	.133	.136	-.137	.403
Unequal variances			.997	55.650	.323	.133	.133	-.134	.400
Learn from Praise Perceived	.291	.591							
Equal variances			-.371	74	.712	-.102	.274	-.647	.444
Unequal variances			-.374	51.973	.710	-.102	.272	-.647	.443
Balance in Behaviour Desired	2.212	.141							
Equal variances			-1.067	76	.289	-.135	.126	-.386	.117
Unequal variances			-1.011	43.608	.318	-.135	.133	-.403	.134
Balance in behaviour Perceived	4.212	.044							
Equal variances			1.198	74	.235	.208	.173	-.138	.553
Unequal variances			1.324	66.002	.190	.208	.157	-.106	.521
Learn from Criticism Desired	2.100	.151							
Equal variances			-.279	76	.781	-.038	.138	-.313	.236
Unequal variances			-.252	38.915	.802	-.038	.152	-.347	.270
Learn from Criticism Perceived	.507	.479							
Equal variances			-.357	74	.722	-.083	.233	-.547	.381
Unequal variances			-.334	42.596	.740	-.083	.248	-.584	.418
Understand Baptismal Call Desired	4.481	.037							
Equal variances			-.994	78	.323	-.117	.117	-.351	.117
Unequal variances			-1.097	68.085	.276	-.117	.106	-.329	.095
Understand Baptismal Call Perceived	1.511	.223							
Equal variances			.792	76	.431	.192	.243	-.291	.676
Unequal variances			.852	60.890	.398	.192	.226	-.259	.644
Sense of Vocation Desired	15.960	.000							
Equal variances			-1.783	77	.078	-.201	.113	-.425	.023
Unequal variances			-1.878	60.838	.065	-.201	.107	-.415	.013
Sense of Vocation Perceived	1.366	.246							
Equal variances			.668	76	.506	.154	.230	-.305	.612
Unequal variances			.708	58.381	.482	.154	.217	-.281	.589
Open to Transcendent Desired	.225	.637							
Equal variances			-.055	75	.956	-.007	.123	-.252	.238
Unequal variances			-.053	44.236	.958	-.007	.129	-.267	.254
Open to Transcendent Perceived	.410	.524							
Equal variances			.550	75	.584	.164	.299	-.430	.759
Unequal variances			.569	48.225	.572	.164	.289	-.416	.745
See Ministry of Governance Desired	1.188	.279							
Equal variances			-.842	78	.402	-.099	.118	-.334	.135
Unequal variances			-.820	48.770	.416	-.099	.121	-.343	.144
See Ministry of Governance Perceived	.806	.372							
Equal variances			2.183	77	.032	.456	.209	.040	.872
Unequal variances			2.298	57.031	.025	.456	.198	.059	.853

	F	Sig.		t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	Lower	Upper
United to Word of God Desired	1.871	.175								
Equal variances				.296	76	.768	.044	.147	-.250	.337
Unequal variances				.279	45.338	.781	.044	.156	-.271	.358
United to Word of God Perceived	2.197	.143								
Equal variances				.193	74	.847	.047	.244	-.438	.532
Unequal variances				.178	39.186	.859	.047	.264	-.487	.581
Committed to Mission of Church Desired	5.269	.024								
Equal variances				1.158	78	.251	.144	.124	-.104	.392
Unequal variances				.996	36.290	.326	.144	.145	-.149	.437
Committed to Mission of Church Perceived	.189	.665								
Equal variances				1.812	76	.074	.410	.226	-.041	.860
Unequal variances				1.920	54.693	.060	.410	.213	-.018	.838
Growth in Love Desired	1.822	.181								
Equal variances				.595	77	.554	.075	.126	-.176	.325
Unequal variances				.570	46.942	.572	.075	.131	-.189	.339
Growth in Love Perceived	.003	.957								
Equal variances				.498	76	.620	.138	.277	-.414	.691
Unequal variances				.495	46.364	.623	.138	.279	-.424	.700
Bridge for People to Christ Desired	.296	.588								
Equal variances				-.183	73	.856	-.032	.178	-.386	.321
Unequal variances				-.178	50.042	.860	-.032	.182	-.398	.333
Bridge for People to Christ Perceived	.425	.516								
Equal variances				.797	72	.428	.184	.231	-.276	.643
Unequal variances				.789	47.115	.434	.184	.233	-.285	.652
Identification with Ecclesial Community Desired	.803	.373								
Equal variances				1.016	77	.313	.162	.160	-.156	.481
Unequal variances				.961	45.440	.342	.162	.169	-.178	.503
Identification with Ecclesial Community Perceived	1.809	.183								
Equal variances				.250	76	.803	.065	.260	-.452	.582
Unequal variances				.235	40.723	.815	.065	.276	-.493	.623
Practices of Prayer and Spirituality Desired	2.517	.117								
Equal variances				-.765	76	.446	-.100	.131	-.361	.161
Unequal variances				-.804	60.946	.424	-.100	.125	-.349	.149
Practices of Prayer and Spirituality Perceived	.109	.742								
Equal variances				.860	74	.393	.229	.266	-.302	.760
Unequal variances				.853	46.826	.398	.229	.268	-.311	.769
Faith Rooted in God's Revelation Desired	1.115	.294								
Equal variances				.069	78	.945	.009	.131	-.252	.270
Unequal variances				.072	58.505	.943	.009	.126	-.243	.261
Faith Rooted in God's Revelation Perceived	.109	.742								
Equal variances				.235	76	.815	.058	.245	-.431	.546
Unequal variances				.239	52.241	.812	.058	.242	-.427	.542
Faith Embodied in Living Tradition Desired	.001	.978								
Equal variances				-.558	77	.579	-.076	.137	-.348	.196
Unequal variances				-.556	52.323	.581	-.076	.137	-.351	.199
Faith Embodied in Living Tradition Perceived	.301	.585								
Equal variances				.483	76	.630	.115	.239	-.360	.591
Unequal variances				.496	53.840	.622	.115	.233	-.351	.582

	F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	Lower	Upper
Journey to Theological Reflection Desired	.027	.869	-.375	77	.709	-.057	.152	-.360	.246
Equal variances									
Unequal variances			-.358	46.777	.722	-.057	.159	-.377	.263
Journey to Theological Reflection Perceived	.040	.842							
Equal variances			2.257	75	.027	.622	.276	.073	1.172
Unequal variances			2.324	51.208	.024	.622	.268	.085	1.160
Some Background in Missiology Desired	2.296	.134							
Equal variances			-.488	74	.627	-.082	.169	-.418	.254
Unequal variances			-.463	41.689	.646	-.082	.178	-.442	.277
Some Background in Missiology Perceived	1.554	.217							
Equal variances			-1.726	73	.089	-.439	.254	-.945	.068
Unequal variances			-1.660	41.038	.105	-.439	.264	-.972	.095
Some Background in Ecclesiology Desired	.338	.563							
Equal variances			-1.411	77	.162	-.212	.150	-.512	.087
Unequal variances			-1.402	51.822	.167	-.212	.151	-.516	.092
Some Background in Ecclesiology Perceived	.144	.706							
Equal variances			.983	76	.329	.212	.215	-.217	.640
Unequal variances			.983	50.165	.330	.212	.215	-.221	.644
Some Background in Canon Law Desired	.537	.466							
Equal variances			-1.452	77	.151	-.237	.163	-.562	.088
Unequal variances			-1.461	53.719	.150	-.237	.162	-.563	.088
Some Background in Canon Law Perceived	.002	.968							
Equal variances			1.390	76	.169	.288	.207	-.125	.702
Unequal variances			1.349	46.303	.184	.288	.214	-.142	.719
Articulate Missiology for Ministry Desired	.701	.405							
Equal variances			-.724	76	.471	-.105	.145	-.394	.184
Unequal variances			-.689	41.818	.495	-.105	.152	-.412	.202
Articulate Missiology for Ministry Perceived	.144	.706							
Equal variances			1.152	75	.253	.269	.233	-.196	.734
Unequal variances			1.222	51.544	.227	.269	.220	-.173	.710
Understand needs in Light of Scripture and Tradition Desired	5.448	.022							
Equal variances			.087	77	.931	.013	.147	-.281	.307
Unequal variances			.077	38.185	.939	.013	.167	-.326	.351
Understand Needs in Light of Scripture and Tradition Perceived	.332	.566							
Equal variances			1.015	76	.313	.269	.265	-.259	.798
Unequal variances			.962	43.607	.341	.269	.280	-.295	.834
Knowledge of Catholic Social Teaching Desired	3.088	.083							
Equal variances			-1.429	77	.157	-.202	.141	-.483	.079
Unequal variances			-1.480	54.645	.145	-.202	.136	-.475	.071
Knowledge of Catholic Social Teaching Perceived	.205	.652							
Equal variances			2.288	76	.025	.498	.218	.065	.932
Unequal variances			2.331	49.391	.024	.498	.214	.069	.927
Catechism of Catholic Church Desired	.083	.774							
Equal variances			-.793	74	.431	-.106	.134	-.372	.160
Unequal variances			-.773	50.006	.443	-.106	.137	-.381	.169

	F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	Lower	Upper
Knowledge of Catholic Catechism Perceived	1.763	.188							
Equal variances			.543	75	.588	.137	.251	-.364	.637
Unequal variances			.565	56.174	.574	.137	.241	-.347	.620
Appreciation of Faith through Intellectual Formation Desired	.001	.977							
Equal variances			.227	74	.821	.035	.152	-.269	.338
Unequal variances			.219	43.898	.827	.035	.157	-.282	.351
Appreciation of Faith through Intellectual Formation Perceived	.899	.346							
Equal variances			.543	73	.589	.118	.217	-.314	.550
Unequal variances			.582	53.962	.563	.118	.202	-.288	.523
Understand the Ministry Desired	3.122	.081							
Equal variances			.820	78	.415	.089	.108	-.127	.304
Unequal variances			.749	41.574	.458	.089	.118	-.150	.328
Understand the Ministry Perceived	.464	.498							
Equal variances			1.124	78	.264	.203	.181	-.157	.563
Unequal variances			1.134	53.728	.262	.203	.179	-.156	.563
Understand Responsibility for Catholic Identity Desired	9.725	.003							
Equal variances			1.753	77	.084	.215	.123	-.029	.459
Unequal variances			1.489	35.117	.146	.215	.144	-.078	.508
Understand the Responsibility for Catholic Identity Perceived	2.730	.103							
Equal variances			-.359	78	.721	-.075	.210	-.494	.343
Unequal variances			-.324	40.415	.748	-.075	.233	-.546	.395
Discern Signs of Times for Mission Desired	1.443	.233							
Equal variances			.258	76	.797	.035	.135	-.234	.304
Unequal variances			.232	39.990	.817	.035	.150	-.268	.338
Discern Signs of Times for Mission Perceived	.188	.666							
Equal variances			.491	77	.625	.110	.225	-.338	.558
Unequal variances			.507	57.803	.614	.110	.218	-.325	.546
Call Leaders to Account Appropriately Desired	1.612	.208							
Equal variances			.629	75	.531	.087	.139	-.189	.364
Unequal variances			.575	41.668	.568	.087	.152	-.219	.394
Call Leaders to Account Appropriately Perceived	.021	.886							
Equal variances			.623	77	.535	.153	.246	-.337	.643
Unequal variances			.618	51.790	.539	.153	.248	-.344	.650
Understand Responsibilities of Bishop for Coordination Desired	1.250	.267							
Equal variances			-.267	77	.790	-.035	.131	-.295	.225
Unequal variances			-.248	43.200	.805	-.035	.141	-.319	.249
Understand Responsibilities of Bishop for Coordination Perceived	1.142	.289							
Equal variances			.511	78	.611	.123	.241	-.356	.602
Unequal variances			.543	61.769	.589	.123	.227	-.330	.576
Forming Future Governors Desired	.291	.591							
Equal variances			-1.621	74	.109	-.228	.140	-.507	.052
Unequal variances			-1.447	34.786	.157	-.228	.157	-.547	.092

	F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	Lower	Upper
Forming Future Governors Perceived	.243	.624							
Equal variances			2.249	74	.027	.577	.256	.066	1.088
Unequal variances			2.309	47.846	.025	.577	.250	.075	1.079
Understand Organisational Systems and Dynamics Desired	.990	.323							
Equal variances			-.531	76	.597	-.072	.135	-.342	.198
Unequal variances			-.559	61.273	.578	-.072	.129	-.329	.185
Understand Organisational Systems and Dynamics Perceived	.083	.774	.853	77	.396	.189	.221	-.252	.629
Equal variances			.819	47.337	.417	.189	.230	-.275	.652
Unequal variances									
Responsibility for Spiritual Life of Ministry Desired	7.825	.007							
Equal variances			.974	75	.333	.146	.149	-.152	.443
Unequal variances			.840	35.039	.407	.146	.173	-.206	.497
Responsibility for Spiritual Life of Ministry Perceived	.136	.713							
Equal variances			-.255	76	.799	-.058	.226	-.508	.393
Unequal variances			-.260	52.851	.796	-.058	.222	-.503	.387
Inspire Common Purpose Desired	.200	.656							
Equal variances			.000	76	1.000	.000	.148	-.296	.296
Unequal variances			.000	42.051	1.000	.000	.159	-.321	.321
Inspire Common Purpose Perceived	.065	.799							
Equal variances			.928	76	.356	.192	.207	-.220	.605
Unequal variances			.917	48.474	.364	.192	.210	-.229	.614
Selecting Future Governors Desired	2.069	.155							
Equal variances			-1.933	72	.057	-.308	.159	-.625	.010
Unequal variances			-1.843	38.134	.073	-.308	.167	-.646	.030
Selecting Future Governors Perceived	.267	.607							
Equal variances			1.312	73	.194	.358	.273	-.186	.902
Unequal variances			1.237	39.205	.224	.358	.289	-.227	.943

NUMBER of PJPs (ONE vs. MORE)	Levene's test		t-test (2-tailed)						
	F	Sig	t	df	P	Mean Diff	S.E. Diff	95% CI Lower	Upper
People of Integrity Desired	.000	1.000	.000	56	1.000	.000	.068	-.136	.136
Equal variances			.000	56.000	1.000	.000	.068	-.136	.136
Unequal variances									
People of Integrity Perceived	.776	.382							
Equal variances			-.406	53	.686	-.086	.212	-.510	.338
Unequal variances			-.409	48.527	.684	-.086	.210	-.509	.337
Balance in Judgement Desired	19.192	.000							
Equal variances			-2.337	56	.023	-.276	.118	-.512	-.039
Unequal variances			-2.337	52.240	.023	-.276	.118	-.513	-.039
Balance in Judgement Perceived	8.225	.006							
Equal variances			-1.891	53	.064	-.430	.227	-.886	.026
Unequal variances			-1.909	43.157	.063	-.430	.225	-.884	.024
Deep Sense of Justice Desired	1.342	.252							
Equal variances			-.579	56	.565	-.069	.119	-.308	.170
Unequal variances			-.579	55.663	.565	-.069	.119	-.308	.170
Deep Sense of Justice Perceived	.348	.558							
Equal variances			-.153	53	.879	-.034	.225	-.485	.417
Unequal variances			-.153	52.612	.879	-.034	.225	-.486	.417
Genuinely Compassionate Desired	.859	.358							
Equal variances			-1.500	56	.139	-.207	.138	-.483	.069
Unequal variances			-1.500	55.782	.139	-.207	.138	-.483	.069
Genuinely Compassionate Perceived	3.676	.061							
Equal variances			-.407	53	.685	-.104	.257	-.619	.410
Unequal variances			-.411	43.781	.683	-.104	.254	-.617	.408
Concern for Others Desired	14.145	.000							
Equal variances			-2.393	55	.020	-.293	.123	-.539	-.048
Unequal variances			-2.384	51.933	.021	-.293	.123	-.540	-.046
Concern for Others Perceived	2.579	.114							
Equal variances			1.393	52	.169	.258	.185	-.114	.630
Unequal variances			1.380	46.994	.174	.258	.187	-.118	.635
Personal Maturity Desired	24.622	.000							
Equal variances			-2.428	56	.018	-.276	.114	-.503	-.048
Unequal variances			-2.428	50.133	.019	-.276	.114	-.504	-.048
Personal Maturity Perceived	.242	.625							
Equal variances			-.369	53	.713	-.069	.186	-.442	.305
Unequal variances			-.368	51.814	.714	-.069	.187	-.443	.306
Demonstrate Self-knowledge Desired	.770	.384							
Equal variances			-.861	55	.393	-.123	.143	-.410	.163
Unequal variances			-.863	54.547	.392	-.123	.143	-.409	.163
Demonstrate Self-knowledge Perceived	4.788	.033							
Equal variances			-1.492	51	.142	-.429	.287	-1.006	.148
Unequal variances			-1.506	42.857	.139	-.429	.285	-1.003	.145
Respect Every Person Desired	7.665	.008							
Equal variances			-1.502	55	.139	-.187	.125	-.437	.063
Unequal variances			-1.498	53.268	.140	-.187	.125	-.438	.063
Respect Every Person Perceived	3.007	.089							
Equal variances			-1.580	52	.120	-.352	.222	-.798	.095
Unequal variances			-1.597	49.813	.116	-.352	.220	-.794	.091
Aware of their Gifts Desired	2.427	.125							
Equal variances			-1.302	55	.198	-.183	.141	-.466	.099
Unequal variances			-1.301	54.496	.199	-.183	.141	-.466	.099

	F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	Lower	Upper
Aware of their Gifts Perceived	1.455	.233							
Equal variances			1.002	52	.321	.258	.258	-.259	.776
Unequal variances			.993	47.212	.326	.258	.260	-.265	.782
Learn from Praise Desired	.052	.820							
Equal variances			-2.300	55	.025	-.351	.153	-.657	-.045
Unequal variances			-2.295	53.605	.026	-.351	.153	-.658	-.044
Learn from Praise Perceived	1.293	.261							
Equal variances			.303	52	.763	.091	.299	-.510	.691
Unequal variances			.306	50.547	.761	.091	.296	-.504	.686
Balance in Behaviour Desired	1.906	.173							
Equal variances			-1.097	54	.278	-.147	.134	-.415	.122
Unequal variances			-1.098	53.914	.277	-.147	.134	-.415	.121
Balance in behaviour Perceived	1.134	.292							
Equal variances			.000	52	1.000	.000	.211	-.423	.423
Unequal variances			.000	45.321	1.000	.000	.211	-.425	.425
Learn from Criticism Desired	3.971	.051							
Equal variances			-1.236	55	.222	-.161	.131	-.423	.100
Unequal variances			-1.237	54.946	.221	-.161	.130	-.423	.100
Learn from Criticism Perceived	.390	.535							
Equal variances			-.298	53	.767	-.081	.270	-.623	.462
Unequal variances			-.299	52.708	.766	-.081	.270	-.622	.461
Understand Baptismal Call Desired	.637	.428							
Equal variances			-.256	56	.799	-.034	.135	-.305	.236
Unequal variances			-.256	54.621	.799	-.034	.135	-.305	.236
Understand Baptismal Call Perceived	.352	.555							
Equal variances			.653	54	.517	.179	.273	-.370	.727
Unequal variances			.653	53.686	.517	.179	.273	-.370	.727
Sense of Vocation Desired	2.202	.143							
Equal variances			-.735	56	.465	-.103	.141	-.385	.178
Unequal variances			-.735	54.764	.465	-.103	.141	-.385	.178
Sense of Vocation Perceived	.054	.817							
Equal variances			.566	54	.574	.143	.253	-.363	.649
Unequal variances			.566	54.000	.574	.143	.253	-.363	.649
Open to Transcendent Desired	2.954	.091							
Equal variances			-1.777	55	.081	-.260	.146	-.553	.033
Unequal variances			-1.774	54.173	.082	-.260	.146	-.553	.034
Open to Transcendent Perceived	6.780	.012							
Equal variances			-.859	53	.394	-.271	.316	-.904	.362
Unequal variances			-.866	46.139	.391	-.271	.313	-.902	.359
See Ministry of Governance Desired	5.545	.022							
Equal variances			-1.270	56	.209	-.172	.136	-.444	.100
Unequal variances			-1.270	53.283	.210	-.172	.136	-.445	.100
See Ministry of Governance Perceived	.155	.695							
Equal variances			.000	54	1.000	.000	.234	-.469	.469
Unequal variances			.000	54.000	1.000	.000	.234	-.469	.469
United to Word of God Desired	.691	.409							
Equal variances			-1.975	55	.053	-.329	.167	-.663	.005
Unequal variances			-1.974	54.780	.053	-.329	.167	-.663	.005
United to Word of God Perceived	7.108	.010							
Equal variances			-.141	52	.888	-.037	.262	-.563	.489
Unequal variances			-.141	41.906	.888	-.037	.262	-.566	.492
Committed to Mission of Church Desired	15.943	.000							
Equal variances			-2.155	56	.036	-.276	.128	-.532	-.019
Unequal variances			-2.155	48.991	.036	-.276	.128	-.533	-.019

	F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	Lower	Upper
Committed to Mission of Church Perceived	1.746	.192							
Equal variances			-.279	53	.782	-.071	.256	-.586	.443
Unequal variances			-.280	51.081	.781	-.071	.255	-.584	.441
Growth in Love Desired	.538	.466							
Equal variances			-1.769	55	.082	-.261	.148	-.557	.035
Unequal variances			-1.767	54.539	.083	-.261	.148	-.557	.035
Growth in Love Perceived	1.888	.175							
Equal variances			.309	53	.758	.094	.304	-.516	.703
Unequal variances			.311	50.464	.757	.094	.302	-.513	.701
Bridge for People to Christ Desired	.486	.489							
Equal variances			-.977	54	.333	-.183	.187	-.557	.192
Unequal variances			-.986	52.277	.329	-.183	.185	-.554	.189
Bridge for People to Christ Perceived	.532	.469							
Equal variances			-1.712	51	.093	-.410	.239	-.891	.071
Unequal variances			-1.727	50.946	.090	-.410	.237	-.887	.067
Identification with Ecclesial Community Desired	2.199	.144							
Equal variances			-2.779	56	.007	-.517	.186	-.890	-.144
Unequal variances			-2.779	49.950	.008	-.517	.186	-.891	-.143
Identification with Ecclesial Community Perceived	.688	.411							
Equal variances			1.063	53	.293	.311	.292	-.276	.897
Unequal variances			1.058	49.597	.295	.311	.294	-.279	.901
Practices of Prayer and Spirituality Desired	.085	.772							
Equal variances			-1.161	55	.250	-.193	.166	-.527	.140
Unequal variances			-1.161	54.923	.250	-.193	.166	-.527	.140
Practices of Prayer and Spirituality Perceived	.028	.868							
Equal variances			.354	52	.725	.104	.295	-.487	.696
Unequal variances			.355	51.877	.724	.104	.294	-.486	.695
Faith Rooted in God's Revelation Desired	.000	1.000							
Equal variances			-1.395	56	.169	-.207	.148	-.504	.090
Unequal variances			-1.395	55.992	.169	-.207	.148	-.504	.090
Faith Rooted in God's Revelation Perceived	.753	.389							
Equal variances			-.715	54	.477	-.179	.250	-.679	.322
Unequal variances			-.715	51.259	.478	-.179	.250	-.680	.323
Faith Embodied in Living Tradition Desired	1.032	.314							
Equal variances			-2.790	56	.007	-.414	.148	-.711	-.117
Unequal variances			-2.790	52.289	.007	-.414	.148	-.711	-.116
Faith Embodied in Living Tradition Perceived	2.599	.113							
Equal variances			1.156	54	.253	.286	.247	-.210	.781
Unequal variances			1.156	50.740	.253	.286	.247	-.211	.782
Journey to Theological Reflection Desired	.896	.348							
Equal variances			-2.023	56	.048	-.310	.153	-.618	-.003
Unequal variances			-2.023	55.393	.048	-.310	.153	-.618	-.003
Journey to Theological Reflection Perceived	.003	.953							
Equal variances			.455	54	.651	.143	.314	-.487	.773
Unequal variances			.455	53.993	.651	.143	.314	-.487	.773
Some Background in Missiology Desired	.102	.750							
Equal variances			.185	54	.854	.036	.193	-.351	.422
Unequal variances			.185	53.893	.854	.036	.193	-.351	.422
Some Background in Missiology Perceived	.101	.752							
Equal variances			-.413	52	.681	-.111	.269	-.651	.429
Unequal variances			-.413	51.984	.681	-.111	.269	-.651	.429

	F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	Lower	Upper
Some Background in Ecclesiology Desired	.025	.874							
Equal variances			-1.180	56	.243	-.207	.175	-.558	.144
Unequal variances			-1.180	55.032	.243	-.207	.175	-.558	.144
Some Background in Ecclesiology Perceived	.158	.693							
Equal variances			.422	54	.675	.107	.254	-.402	.616
Unequal variances			.422	53.750	.675	.107	.254	-.402	.616
Some Background in Canon Law Desired	.015	.902							
Equal variances			-1.306	56	.197	-.241	.185	-.612	.129
Unequal variances			-1.306	55.647	.197	-.241	.185	-.612	.129
Some Background in Canon Law Perceived	2.106	.153							
Equal variances			.303	54	.763	.071	.236	-.402	.545
Unequal variances			.303	50.387	.763	.071	.236	-.403	.546
Articulate Missiology for Ministry Desired	3.868	.054							
Equal variances			.316	55	.753	.050	.160	-.270	.371
Unequal variances			.318	51.701	.752	.050	.159	-.269	.369
Articulate Missiology for Ministry Perceived	.022	.883							
Equal variances			-.011	52	.991	-.003	.256	-.516	.511
Unequal variances			-.011	51.963	.991	-.003	.255	-.515	.510
Understand needs in Light of Scripture and Tradition Desired	.017	.897							
Equal variances			-1.303	56	.198	-.207	.159	-.525	.111
Unequal variances			-1.303	55.396	.198	-.207	.159	-.525	.111
Understand Needs in Light of Scripture and Tradition Perceived	.594	.444							
Equal variances			-.364	53	.718	-.108	.298	-.707	.490
Unequal variances			-.363	51.049	.718	-.108	.299	-.709	.492
Knowledge of Catholic Social Teaching Desired	3.173	.080							
Equal variances			-.804	55	.425	-.122	.152	-.426	.182
Unequal variances			-.801	51.255	.427	-.122	.152	-.427	.184
Knowledge of Catholic Social Teaching Perceived	.142	.707							
Equal variances			.081	53	.935	.019	.228	-.438	.475
Unequal variances			.081	51.764	.936	.019	.228	-.439	.476
Catechism of Catholic Church Desired	.173	.679							
Equal variances			-.636	53	.527	-.102	.160	-.423	.219
Unequal variances			-.636	52.782	.527	-.102	.160	-.423	.219
Knowledge of Catholic Catechism Perceived	.977	.328							
Equal variances			-1.648	52	.105	-.444	.270	-.986	.097
Unequal variances			-1.648	50.685	.105	-.444	.270	-.986	.097
Appreciation of Faith through Intellectual Formation Desired	.901	.347							
Equal variances			-1.532	54	.131	-.214	.140	-.495	.066
Unequal variances			-1.532	53.501	.131	-.214	.140	-.495	.066
Appreciation of Faith through Intellectual Formation Perceived	.309	.581							
Equal variances			.923	52	.360	.222	.241	-.261	.705
Unequal variances			.923	49.741	.360	.222	.241	-.261	.706
Understand the Ministry Desired	53.448	.000							
Equal variances			-3.000	56	.004	-.310	.103	-.518	-.103
Unequal variances			-3.000	42.215	.005	-.310	.103	-.519	-.102
Understand the Ministry Perceived	.537	.467							
Equal variances			1.348	55	.183	.283	.210	-.138	.704
Unequal variances			1.349	54.976	.183	.283	.210	-.138	.704

	F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	Lower	Upper
Understand Responsibility for Catholic Identity Desired	36.310	.000							
Equal variances			-2.754	55	.008	-.307	.111	-.530	-.084
Unequal variances			-2.776	47.370	.008	-.307	.110	-.529	-.084
Understand the Responsibility for Catholic Identity Perceived	13.623	.001							
Equal variances			.389	55	.699	.076	.196	-.317	.470
Unequal variances			.386	46.683	.701	.076	.198	-.321	.474
Discern Signs of Times for Mission Desired	3.125	.083							
Equal variances			-.974	55	.334	-.127	.130	-.388	.134
Unequal variances			-.975	54.962	.334	-.127	.130	-.387	.134
Discern Signs of Times for Mission Perceived	1.313	.257							
Equal variances			.369	55	.714	.095	.257	-.420	.610
Unequal variances			.370	54.132	.713	.095	.256	-.419	.609
Call Leaders to Account Appropriately Desired	7.731	.007							
Equal variances			-1.725	53	.090	-.241	.140	-.521	.039
Unequal variances			-1.733	50.650	.089	-.241	.139	-.520	.038
Call Leaders to Account Appropriately Perceived	.797	.376							
Equal variances			-.270	54	.788	-.080	.298	-.678	.517
Unequal variances			-.268	51.021	.789	-.080	.300	-.682	.521
Understand Responsibilities of Bishop for Coordination Desired	3.751	.058							
Equal variances			-1.279	55	.206	-.192	.150	-.493	.109
Unequal variances			-1.273	51.010	.209	-.192	.151	-.495	.111
Understand Responsibilities of Bishop for Coordination Perceived	5.082	.028							
Equal variances			.190	55	.850	.052	.272	-.494	.598
Unequal variances			.191	50.547	.849	.052	.271	-.492	.596
Forming Future Governors Desired	1.963	.167							
Equal variances			-1.121	53	.267	-.163	.145	-.454	.128
Unequal variances			-1.118	51.252	.269	-.163	.146	-.455	.129
Forming Future Governors Perceived	.955	.333							
Equal variances			-.511	52	.612	-.148	.290	-.730	.434
Unequal variances			-.511	50.422	.612	-.148	.290	-.731	.434
Understand Organisational Systems and Dynamics Desired	2.804	.100							
Equal variances			-2.044	55	.046	-.304	.149	-.602	-.006
Unequal variances			-2.046	54.993	.046	-.304	.149	-.602	-.006
Understand Organisational Systems and Dynamics Perceived	1.199	.278							
Equal variances			.000	54	1.000	.000	.259	-.520	.520
Unequal variances			.000	51.990	1.000	.000	.259	-.520	.520
Responsibility for Spiritual Life of Ministry Desired	3.306	.075							
Equal variances			-1.914	53	.061	-.271	.142	-.555	.013
Unequal variances			-1.907	50.562	.062	-.271	.142	-.557	.014
Responsibility for Spiritual Life of Ministry Perceived	.060	.807							
Equal variances			.394	53	.695	.086	.218	-.351	.523
Unequal variances			.395	52.995	.695	.086	.218	-.351	.523
Inspire Common Purpose Desired	.406	.527							
Equal variances			-.670	54	.506	-.102	.153	-.408	.204
Unequal variances			-.669	53.413	.506	-.102	.153	-.408	.204

Inspire Common Purpose Perceived	.930	.339						
Equal variances			-1.178	53	.244	-.276	.235	-.747	.194
Unequal variances			-1.183	51.161	.242	-.276	.234	-.746	.193
Selecting Future Governors Desired	1.625	.208							
Equal variances			-.566	51	.574	-.100	.177	-.454	.254
Unequal variances			-.560	46.447	.578	-.100	.179	-.459	.259
Selecting Future Governors Perceived	.010	.921							
Equal variances			-1.156	51	.253	-.325	.281	-.889	.239
Unequal variances			-1.154	50.128	.254	-.325	.281	-.890	.240