Forming Partners in Mission: Sharing the Jesuit Tradition in Education

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Boston College

The Graduate School of Arts and Sciences

Institute of Religious Education and Pastoral Ministry

FORMING PARTNERS IN MISSION:
SHARING THE JESUIT TRADITION IN EDUCATION

a dissertation

by

EDUARDO TEIXEIRA HENRIQUES

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Forming Partners in Mission: Sharing the Jesuit Tradition in Education

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Abstract

The research question of the dissertation is: How to form partners in education to share in the common mission of Jesuit educational institutions? I craft the answer to this question by studying the Spiritual Exercises of Saint Ignatius of Loyola. I claim an analogy between the central dynamic of the thirty-day retreat, whose guidelines are in the book of the Spiritual Exercises, and four operative principles that ought to constitute the structure of formation programs for Jesuit schools’ faculty and staff in the educational tradition, identity and mission of the Society of Jesus.

The four operative principles are discernment, desire, diakonia and decision. Formation that aims at training partners in education to share in the common mission of Jesuit schools happens best when these four operative principles inform the curriculum design and when they interplay during the actual process of forming the educators who work in Jesuit schools.

*Discernment* is the under-girding principle because the Society of Jesus is engaged in education to form women and men who can discern, that is to say, who can decide from their in-depth values, convictions and aspirations. *Desire* is the operative principle of the first movement of the Spiritual Exercises, which corresponds to the first week of the retreat. *Diakonia*—the Greek word for
service—draws upon the second movement of the *Exercises*, which expands beyond the second week of the retreat into the third and fourth ones. This second movement is unified by the idea of being inspired by Jesus Christ or from “outside” of the retreatants. Lastly, *decision* is the third movement of the *Spiritual Exercises*. Ignatius invites the exercitants to make a personal choice of a state of life at the core of the second week of the retreat. But *decision* as operative principle accompanies the retreatants until the end of their thirty-day experience.

The doctoral program of the Boston College Institute of Religious Education and Pastoral Ministry is in theology and education. The dissertation is an academic exercise in the field of pastoral or practical theology at the intersection of education, theology and the means of church education inspired by the *Spiritual Exercises*. Therefore, besides the analogical reading of Ignatius’s work, my method consists of putting the aforementioned operative principles in conversation with a select review of literature in the fields of transformative and reflective adult education, developmental psychology, responsible and collaborative leadership, pastoral ministry and educational change.
# Table of Contents

**Acknowledgements** ......................................................................................................................................................... iv

**Dedication** ........................................................................................................................................................................ viii

**PREFACE** ........................................................................................................................................................................... I

**CHAPTER 1 – OVERVIEW OF THE PROBLEM** ..................................................................................................................... 4

1.A: The Question of the Dissertation ........................................................................................................................................ 5

   1.B.1 – Challenge of Jesuit Education 1: Diminishing Numbers of Jesuits ................................................................. 13
   1.B.2 – Challenge 2: Cultural Pluralism in Jesuit Schools .......................................................................................... 14
   1.B.3 – Challenge 3: Conflicting Educational Philosophies ..................................................................................... 18
   1.B.4 – The Rationale of Forming for Partnership in Mission .................................................................................. 19

1.C: The Jesuits and Education ................................................................................................................................................ 21
   1.C.1 – In the Constitutions .............................................................................................................................................. 24
   1.C.2 – European Renaissance and Humanism .............................................................................................................. 25
   1.C.3 – The Spiritual Experience of Ignatius of Loyola ............................................................................................ 28

1.D – The Structure of the Dissertation ........................................................................................................................................ 33

**CHAPTER 2 – SOME PEDAGOGICAL PREMISES: THE ANNOTATIONS OF THE SPIRITUAL EXERCISES** ................................. 37

2.1 – The Nature of the Annotations of the SE ......................................................................................................................... 39

2.2 – The Three Educational Goals of the Annotations: Learning Community, Active Learning, and Discernment ......................................................................................................................... 42

2.3 – Discernment and Transformative Learning ................................................................................................................................. 47

2.4 – Discernment and Meaning-Making Activity ......................................................................................................................... 57
   2.4.1 – Robert Kegan’s Third and Fourth Orders of Consciousness ........................................................................... 58
   2.4.2 – James Fowler’s Third and Fourth Stages of Faith .......................................................................................... 62
   2.4.3 – Kegan and Fowler: a Summary .................................................................................................................. 66

2.5 – Conclusion to Chapter 2 .................................................................................................................................................. 70

**CHAPTER 3 – WHO AM I? THE PRINCIPLE AND FOUNDATION AND THE FIRST WEEK OF THE SPIRITUAL EXERCISES** ................. 71

3.1 – The Principle and Foundation ........................................................................................................................................... 73

3.2 – Meditations about Sin ..................................................................................................................................................... 77
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>After “Freedom from” Comes “Freedom to”</td>
<td>180</td>
</tr>
<tr>
<td>Implications for Policy, Practice and Research</td>
<td>182</td>
</tr>
<tr>
<td>Appendix 1</td>
<td>187</td>
</tr>
<tr>
<td>Appendix 2</td>
<td>188</td>
</tr>
<tr>
<td>Appendix 3</td>
<td>197</td>
</tr>
<tr>
<td>Appendix 4</td>
<td>199</td>
</tr>
<tr>
<td>Bibliography</td>
<td>203</td>
</tr>
</tbody>
</table>
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To the Society of Jesus

In loving memory of my father,
Tarcísio de Moura Henriques (1935-2008).
He counted the days since I left Brazil until
his own were counted. We’ll meet again.

Also to my mother,
Maria Beatriz Teixeira Henriques,
my sister Maria Teresa and my brother
Guilherme, his wife Vângela and nephew
Miguel Lopes Henriques.
Leadership draws change out of staff rather than driving reforms through them.

Andy Hargreaves

Desire and choose only what helps you attain the end for which you are created.

Ignatius of Loyola
Preface

Two hundred and seventeen Jesuits from around the world gathered in Rome from January 7th to March 6th, 2008 for the realization of the 35th General Congregation of the Society of Jesus. During that time, they accomplished the two traditional purposes that have required the convocation of such meetings since 1538, namely, they elected a new Superior General of the Jesuit order, Fr. Adolfo Nicolás, and produced six decrees that deal with matters of importance in Jesuit life. Among these documents, one is entitled “Collaboration at the Heart of Mission.” When the decree reflects about formation programs for collaboration between Jesuits and non-Jesuits, it reads in part as follows:

Numerous programs of Ignatian formation have grown up around the world [since the last General Congregation], adapted to various religious and cultural contexts. The foundational grace of the Spiritual Exercises is more widely available and provides a common language and experience, in which collaboration in mission is rooted and inspired. […] Further, the Society has been enriched by our encounter with diverse communities of dialogue and cooperation. Lay and religious, women and men, indigenous persons and those of different religious and spiritual experiences: all these have changed us and nurtured in us a greater sense of the God “in whom we live and move and have our being.

The formation of Jesuits for collaboration, however, must be accompanied by a parallel formation of those with whom we minister, so that they might deepen their understanding of the mission they share with us. Diverse programs that respect and draw upon the wisdom and experience of the participants allow for a personal appropriation of the mission of the Society. Respecting various levels of connection and understanding, these programs invite each person—whether employee or volunteer, newly arrived or veteran, Christian believer or member of another faith community, or person without a
religious affiliation—into a deeper awareness of his or her place in the Ignatian and Jesuit mission.¹

The present dissertation is about formation programs for those with whom Jesuits minister in Jesuit schools. Its main claim is that the heart of any work related to the Society of Jesus is the *Spiritual Exercises* of Ignatius of Loyola, which he wrote as guidelines for a thirty-day retreat. I read this major spiritual work of the founder of the Jesuit order as the source of four operative principles for formation programs for faculty and staff of Jesuit schools. Throughout the dissertation, I assert an analogy between the central dynamic of the *Spiritual Exercises* and the structure of such programs in order to form partners in the common mission of Jesuit education.

The four operative principles are: *discernment, desire, diakonia* and *decision*. *Discernment* is the under-girding principle because the Society of Jesus is engaged in education to form women and men who can discern, that is to say, who can decide from their in-depth values, convictions and aspirations. *Desire* is the operative principle of the first movement of the *Spiritual Exercises*, which corresponds to the first week of the retreat. *Diakonia*—the Greek word for *service*—draws upon the second movement of *Exercises*, which expands beyond the second week of the retreat into the third and fourth ones. This second movement is unified by the idea of being inspired by Jesus Christ or from “outside” of the retreatants. Lastly, *decision* is the third movement of the *Spiritual Exercises*. Ignatius invites the exercitants to make a personal election of a state of

life at the core of the second week of the retreat. But decision as operative principle accompanies the retreatants until the end of their thirty-day experience.

The dissertation is an academic exercise in the field of pastoral or practical theology at the intersection of education, theology and the means of church education inspired by the *Spiritual Exercises*. Heinz Schuster states that practical theology “deals with the Church as a reality with a social and historical structure,” which, therefore, “has to be actualized here and now at any given moment in order really to be what it is and achieve its purpose.”2

Therefore, besides the analogical reading of Ignatius’s work, my method consists of putting the operative principles aforementioned in conversation with a selected review of literature in the fields of transformative and reflective adult education, developmental psychology, responsible and collaborative leadership, pastoral ministry and educational change.

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Chapter 1 – Overview of the Problem

Jesuits have been involved with education since their foundation in 1540. Currently, the numbers speak for themselves. There are 950 Jesuit educational institutions in more than sixty countries, plus 2,949 Fe y Alegría schools in twenty countries\(^1\). The impressive number of people benefiting from primary, secondary, technical or professional, to higher education in Jesuit schools is over three million students worldwide. There are 3,732 Jesuits and 130,571 other teachers and administrators working in Jesuit schools.\(^2\) Most of the non-Jesuits are laypeople, but there are also vowed religious men and women of other institutes of consecrated life and diocesan priests. The present dissertation is concerned with the future fidelity and effectiveness of those schools in regard to their educational mission and charism. Therefore, the dissertation addresses the issue of formation of educators in the tradition of Jesuit education.

Firstly, Chapter One presents the general research question of the dissertation and explains the terms and background of the question (1.A). Secondly, it develops the general hypothesis of the dissertation by explaining both

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\(^1\) “Fe y Alegría is a ‘Movement for Integral Popular Education and Social Development’ whose activities are directed to the most impoverished and excluded sectors of the population, in order to empower them in their personal development and their participation in society. . . . Fe y Alegría was born in Venezuela in 1955 as a way to consolidate efforts that were being made to provide educational services in the slum zones of Caracas. The bold vision of the founder, Fr. José María Velaz, S.J., and the collaboration of numerous people and organizations resulted in the crystallization of a work rich in history and in vision of the future, . . . [whose proposals] have become embodied in a variety of initiatives . . . such as : radio stations, adult education programs, labor training and school equivalency programs, professional formation at secondary and tertiary levels, development of cooperatives and small businesses, as well as projects for community development, health care, nativity culture, teacher training, publication of educational materials, among others.” See: http://www.feyalegria.org.

the framework of the research and the rationale for using the educational philosophy that rises from the *Spiritual Exercises of St. Ignatius of Loyola* (SE, hereafter) as the inspiration for and organizing principle of the dissertation and the four operative principles for the formation programs that the dissertation envisions (1.B).

Thirdly, Chapter One traces the key history that made the Jesuit order become committed to education to the point that Jesuit schools have become the major apostolic work of the Society of Jesus in many parts of the world. I claim that Ignatius of Loyola (1491-1556) interpreted his own spiritual experience with an educational analogy and transferred it to his SE. In other words, Ignatius used an educational metaphor and imagery to understand the way God is at work in people’s lives in general and his own life in particular. The SE are a formation program whose educational philosophy aims at forming partners in mission (1.C).

Lastly, Chapter One lays out the content of each subsequent chapter of the dissertation, and how they work together as the source of the four operative principles that I indicate as a model for formation programs that aim at forming educators to share in the mission of Jesuit schools (1.D).

1.A: The Question of the Dissertation

The dissertation addresses the issue of formation of educators toward partnership in the mission of Jesuit schools. It offers four operative principles for formation programs in order to form partners in education and partners in the mission of Jesuit education. Therefore, the general research question of the
dissertation is: How to form partners in education to share in the common mission of Jesuit educational institutions?

In order to answer the research question, I argue that such formation programs need to take into account four operative principles that aim at making co-authors of the mission of Jesuit schools out of the educators who are being formed by those programs. The future of the fidelity of Jesuit schools to their educational mission relies on the community of educators who work in those schools and understand themselves as co-authors and co-agents of that mission.

The next question that I deal with is: How do Jesuit schools go about forming educators to become partners and co-authors of the mission of Jesuit educational institutions? The answer to that question lies in allowing those educators to appropriate for themselves the educational philosophy that gave rise to the 450-year-old tradition of Jesuit education in various parts of the world. Such an educational philosophy is found primarily in the *Spiritual Exercises of St. Ignatius of Loyola*. Jesuit schools are to break open the educational philosophy of the SE in order to break open the mission that has characterized Jesuit educational institutions throughout the centuries. In fact, the SE are fundamental to understanding what Jesuits have done (their practices); how they have done it (their processes); and why they have done it (their premises).

As the Jesuits tried to describe to themselves and to others just what made them what they were, they sometimes missed or failed to stress the obvious. They were too close to see it. With the hindsight of over four hundred years, we see more clearly than they did that the *Spiritual Exercises* and the schools were the two most important institutional factors that, when taken in their full implications, shaped the distinctive character of the Society of Jesus. . . .
There was [...] one “doctrine” that was fundamental for [Jesuits], one that
gave orientation to all their ministries and to the way they wanted to lead their
own lives. It was the basic premise of the Exercises, even though it was buried
unobtrusively in the fifteenth “Preliminary Observation”: the Creator deals
directly with the creature, and the creature deals directly with the Creator—
heart to heart, one might say. Upon this teaching Jesuits based their more
characteristic themes—indifference, discernment, and inner devotion, or
consolation.3

As a matter of fact, the first Jesuits to get involved in formal education
brought to that new apostolic initiative for the recently founded Society of Jesus
the same educational philosophy which had (trans)formed them into companions
of Jesus with Ignatius of Loyola in the first place, namely, the modus operandi of
the SE in forming partners in the mission of following Jesus Christ in the Ignatian
way. After being formed into partners in mission, the first companions of Jesus—
as they introduced themselves since 15374—became co-authors of the common
goal of the Jesuit order in general, and the mission of Jesuit educational
institutions in particular.

The rationale that supports the general thesis of the dissertation is the very
same educational philosophy of education of the SE of St. Ignatius of Loyola. The

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Unlike O’Malley, who favors “Preliminary Observation[s]”, George E. Ganss, S.J. (see Bibliography) chooses the expression “Introductory Explanations” to translate Ignatius’s Anotaciones. In the dissertation, I will use the word annotation(s) to refer to the twenty notes with which Ignatius introduces his SE.

4 “In 1537 [Ignatius] and his intimate companions who shared their common apostolic ideals found their group being called Iñiguistas or Ignatiani, much as the followers of Sts. Dominic and Francis were called Dominicans and Franciscans. Ignatius in his humility was displeased by this, since he was not yet a founder or a head with any judicial authority. He proposed and his companions determined that, when asked by what name their group (congregación, congregatio) should be called, they should say that ‘since they had no head (cabeza, caput) except Jesus Christ, whom alone they desired to serve,’ they were ‘of the Compañía de Jesús’ or ‘Societas Jesu.’ Here compañía is a synonym which specifies congregación and means a group. It implies and connotes friendly companionship among the associates and with Jesus . . . . George E. Ganss, S.J., The Constitutions of the Society of Jesus: Translated, with an Introduction and a Commentary (St. Louis, Missouri: The Institute of Jesuit Sources, 1970), 346.
endeavor of Jesuit schools to form educators to share in their mission happens best when educators are formed into becoming co-authors of the mission of the schools. The dissertation argues that this is the way the SE form partners in mission. The breaking open of the wisdom of the SE leads to the breaking open of authorship of the mission of Jesuit educational institutions, too. The latter is the best way for Jesuit schools to remain faithful to what has characterized their educational mission throughout the centuries. Not only did the SE give rise to the principles and orientation of the Jesuit tradition of education, but they also provided those who worked in those schools—for centuries predominantly Jesuits—with the necessary resources to keep the schools faithful to their mission.

The goal of the dissertation is to suggest four operative principles that need to be present in formation programs for partners in education who work in Jesuit educational institutions. The formation programs I have in mind are those that aim to form educators to share in the mission of Jesuit schools. Those programs are, to mention one example, retreats sponsored by the office of mission and ministry or mission and identity of any given Jesuit college or university in the United States. Another example is various workshops that associations of Jesuit secondary-education schools organize. During those retreats and workshops, faculty and administrators are exposed to documents and other texts that constitute the tenets of the Jesuit tradition in education. Educators become familiar, for instance, with Fr. Pedro Arrupe, S.J.’s inspirational allocution *Men

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5 Provinces are the administrative organizational and territorial units of the Jesuits all over the world. It is a fairly common term used by religious orders and congregations. One country can have many provinces within its territory. It often happens that one country forms one province though. Lastly, many countries can form a single province.
[and Women] for Others, which became an expression often used to summarize the mission of Jesuit schools today.

Partners in education as they are referred to in the research question are those men and women who are effectively responsible for the educational endeavor of Jesuit educational institutions. They are: professors and teachers, staff and administrators, students, parents, and Jesuits. Faculty and all those who have academic responsibilities have a direct impact on what happens in the classroom. Administrators also share in the underlying mission of Jesuit schools, despite the fact that their degree of direct involvement with educational activities varies according to their specific attributions and roles in the school. Students and parents are also partners in education. Although students are primarily thought of as those who go to school to “get their education,” education happens best when those who teach understand that everyone is both a learner and a teacher in the educational process. As a matter of fact, students who think they do not know anything have a more difficult, and at times frustrating, learning experience, while teachers who mistakenly presume that they do not have anything else to learn usually teach poorly. Students also have an active role in the educational process.

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6 See Bibliography.
7 In the words of Paulo Freire in his most famous work Pedagogy of the Oppressed: “Liberating education consists in acts of cognition, not transfers of information. It is a learning situation in which the cognizable objects (far from being the end of the cognitive act) intermediates the cognitive actors—teacher on the one hand and students on the other. Accordingly, the practice of problem-posing education entails at the outset that the teacher-student contradiction be resolved. Dialogical relations—indispensable to the capacity of cognitive actors to cooperate in perceiving the same cognizable object—are otherwise impossible.

. . . Through dialogue, the teacher-of-the-students and the students-of-teacher cease to exist and a new term emerges: teacher-student with students-teachers. The teacher is no longer merely the one-who-teaches but one who is himself [or herself] taught in dialogue with the students, who in turn while being taught also teach. They become jointly responsible for a process in which all grow. . . . Here, no one teaches another, nor is anyone self-taught. People teach each other, mediated by the world, by the cognizable objects which in banking education [which is based on
Parents are the primary educators of their children and are to be formed therefore to become partners in education in Jesuit schools, too. Lastly, Jesuits who work in Jesuit schools in various capacities are also to be formed to become partners in education who collaborate with everyone else’s mission and in the common mission to all of carrying on the Jesuit tradition in education.

Lastly, the general research question of the dissertation refers to the mission of Jesuit educational institutions. In the dissertation, this expression refers to schools that were usually founded by the Jesuits and/or can be directly linked to the Jesuit order. Even if there is room for diversity in the definition of what constitutes a Jesuit school, I use the term to talk about schools that claim to carry on the mission of the Jesuit tradition in education and are related to and recognized by the Jesuit order. I use the terms Jesuit schools and Jesuit educational institutions interchangeably, and those expressions cover the wide range of formal degree-granting educational institutions, which go from K-12 schools, Nativity schools, Cristo Rey schools, Fe y Alegría schools and college-

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8 “Schools within the Nativity Miguel Network of Schools are patterned after the Nativity Mission Center, which opened its doors in 1971 to middle school aged boys growing up in the Lower East Side of Manhattan. The school was started to provide the boys–many of whom were new to the country–with an educational program that would help them excel academically, socially and spiritually.

Because many of the boys were testing two and three grades below their grade level, the teachers at Nativity Mission developed a new approach. The school day was lengthened, almost doubling the amount of time the boys would be in school were they in the local public school. A commitment to maintain a low student to teacher ratio ensured time for one-on-one instruction. The summer camp the center had been conducting became incorporated into the school curriculum, and, most importantly, Nativity made a commitment to follow their young alumni through high school and even on to college.” Source: http://www.nativitymiguelschools.org.

9 “Cristo Rey Jesuit High School was founded in 1996 by a group of visionary Chicago Province Jesuits who weren't afraid to take a risk in an effort to serve students in Pilsen & Little Village, a pair of predominantly Latino immigrant neighborhoods on the Lower West Side of Chicago. Cristo Rey provides high quality college preparatory education to students who couldn't otherwise
preparatory high schools to higher education institutions, namely, from small post-secondary schools that offer few undergraduate and/or graduate programs to colleges and larger universities. Other formation centers that are not degree-granting schools, but which are related somehow to the Jesuits, can also benefit from the four operative principles for formation of their partners in education.


I turn now to a more detailed explanation of the general hypothesis of the dissertation, its framework and rationale. The issue to be investigated responds to the challenges for Jesuit schools to remain faithful to the Jesuit tradition in education. The dissertation argues that the answer to those challenges lies in having a pool of well formed educators who will enable Jesuit schools to maintain their educational endeavor in consonance with the Jesuit tradition in education, its vision, mission, characteristics and pedagogical approach. Successful formation programs to that end need to engage educators as active partners of the mission of Jesuit educational institutions. The mission of Jesuit schools needs to be embraced as a common mission that is shared by all of the educational partners involved. Therefore, the research which backs the main hypothesis of the dissertation proposes four operative principles to form partners in education who then will have the necessary resources to respond to the task of being partners in mission.

Jesuit schools will be able to rely on such educators in order to remain faithful to their mission.

However, before explaining the rationale for the general hypothesis of the dissertation, it is necessary to comment on the challenges that Jesuit education faces today in many contexts where Jesuit schools are present. The mission-related challenges that Jesuit schools face today in many parts of the world are at least threefold: 1) diminishing numbers of Jesuits working in education (1.B.1), 2) growing cultural pluralism within schools (1.B.2), and 3) conflicting educational philosophies, especially those that foster a process of commodification of education and disregard for social justice (1.B.3). Each one of those challenges affects Jesuit schools differently, but all of them call for creative and renewed commitment to the Jesuit tradition in education on the one hand, and continuing reflection upon and discernment about the mission of Jesuit educational institutions in present times on the other. My general hypothesis argues that only when partners in education are formed into understanding that the mission of Jesuit schools is also theirs can they contribute efficiently to the process of creative actualization of the educational mission of Jesuit schools and continuing discernment about how that mission is realized in our times.

Therefore, those educators are to be formed to become agent-subjects and co-authors of the mission of Jesuit educational institutions at which they work and partners in fostering the Jesuit tradition in education at large.
1.B.1 – Challenge of Jesuit Education 1: Diminishing Numbers of Jesuits

The challenges are not entirely new insofar as, for many decades now, Jesuit schools and other religiously affiliated educational institutions have faced the reality of diminishing numbers of members of the religious groups or congregations that founded them. The challenge concerning the diminishing number of Jesuits in general, and of those working in education in particular, is actually the one that points to the ability of renewal of the spiritual vigor and vision of the leadership within schools with regard to the maintenance and renewal of the vitality of the Jesuit educational enterprise as a whole.

Framing is about who controls what in the pedagogic process: “where framing is strong, the transmitter has explicit control over selection, sequence, pacing, criteria and the social base” of curriculum and pedagogy in the educational process. . . .

Historically, the framing of Catholic curricula [which also applies to other religiously affiliated schools in general and Jesuit schools in particular], pedagogy and evaluation was determined by the institutional Church, the charism and traditions of religious and teaching orders and by the diocesan head teachers, teachers, inspectors and advisors.10

In many places, that framing process can no longer rely on the single source of the foundational institution of the school, namely, the Society of Jesus in the case that I focus on in this dissertation.11 The prevalent leadership model fostered continuity between the classical view of Jesuit education and the local

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11 The official statistics offered by the website of the Society of Jesus show that, only in the period between 2005 and 2008, the total number of Jesuits in the educational apostolate worldwide dropped from 4,621 to 3,732. At the same time, the total number of non-Jesuit teachers and administrators increased from 125,933 to 130,571. Therefore, Jesuits represented 3.5% of the personnel of Jesuit schools only four years ago, whereas they account for 2.85% of the educators nowadays. Source: [http://www.sjweb.info/education/stats.cfm](http://www.sjweb.info/education/stats.cfm).
reality of schools. Jesuit educational institutions tended to “present themselves as
directed or sponsored by the Society, and so, […] the Jesuit Superior General
visits Jesuit universities [for example] and delivers statements on the meaning of
Jesuit education, as if to suggest that the universities take their mission directly
from him.”12 But, nowadays, more and more lay people who occupy posts of
responsibility and leadership in Jesuit schools because of their academic and
professional credentials come from different cultural and religious backgrounds,
which in turn has an important impact on the framing process of the schools,
regardless of the schools’ religious affiliation, history, or institutional charism and
mission.

1.B.2 – Challenge 2: Cultural Pluralism in Jesuit Schools

Another challenge comes from culture at large, namely, the increasingly
pluralistic component of societies in which Jesuit education takes place in many
parts of the world. This challenge is seen by many as a serious limitation imposed
against the fulfillment of Jesuit educational goals, whereas others—myself
included—want to seize the opportunity to make Jesuit schools more inclusive.
Jesuit educational institutions therefore become conversational platforms for the
collaboration between Jesuits and non-Jesuits in the common mission of Jesuit
education. The recent 35th General Congregation of the Society of Jesus wants to
seize that opportunity as well:

12 Francis X. Clooney, S.J. (Ed.), Jesuit Postmodern: Scholarship, Vocation, and Ministry in the
Collaboration in mission has resulted in abundant blessings for the apostolates and the Society of Jesus. Being with apostolic collaborators in mission encourages us [the Jesuits] to live more fully and authentically our Jesuit religious vocation. Ultimately, we bring to these relationships our own identity as men of the vows [of poverty, chastity, and obedience] and of the [Jesuit] Constitutions, men whose experience of the Spiritual Exercises has bound us to one another and to a particular “pathway to God.” In collaboration with others, in respectful dialogue and shared reflection, in labor alongside those similarly engaged who walk a different pathway, we come to know our own journey and to follow it with new zeal and understanding.13

Hiring for mission is a sub-theme related to the challenge of having increasingly pluralistic, diverse and even multi-religious environments within Jesuit schools. On the one hand, there are the proponents of the idea that the strategy to assure Jesuit and Catholic identity is to hire practicing and committed Catholics and Ignatian-inspired people for mission. On the other hand, there are those who advocate hiring for Jesuit mission with focus on curriculum, pedagogical choices in the classroom, and commitment to the schools’ values, social-justice initiatives, and spiritual formation programs.

I favor the latter approach. Jesuit schools faced with pluralism need to hire for Jesuit mission and not hire exclusively Jesuits or Ignatian-inspired faculty and administrators for mission. One reason for backing such an approach is sheer non-availability of enough candidates who are competent and Ignatianly trained at the same time. One of the major responsibilities of Jesuit schools is educational excellence. To achieve this goal, they have a moral obligation to hire the best

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13 “Decrees of the 35th General Congregation,” in Jesuit Life & Mission Today, edited by John W. Padberg, S.J., Decree 6, [15] 783. General Congregations are the ultimate legislative body of the Jesuit order. As the number 35 indicates, General Congregations have not met very often during the over 450-year history of the Jesuit order. As a matter of fact, Ignatius envisioned this meeting as taking place only when necessary to elect a new Superior General or to discuss matters of importance that affect the whole apostolic activity of the Society in the world.
professionals that they can find in order to achieve excellence in all areas, including academic excellence.

A thorough and sound intellectual formation includes mastery of basic humanistic and scientific disciplines through careful and sustained study that is based on competent and well-motivated teaching. This intellectual formation includes a growing ability to reason reflectively, logically and critically. . . .

In Jesuit education, the criterion of excellence is applied to all areas of school life: the aim is the fullest possible development of every dimension of the person, linked to the development of a sense of values and a commitment to the service of others which gives priority to the needs of the poor and is willing to sacrifice self-interest for the promotion of justice. The pursuit of academic excellence is appropriate in a Jesuit school, but only within the larger context of human excellence. 14

Another reason for favoring the hiring-for-Jesuit-mission approach wherever Jesuit schools face pluralism arises from reflecting upon the identity of Catholic schools in general and Jesuit schools in particular. It is beyond the scope of my research to determine the status of religiously affiliated schools in general and Catholic and Jesuit schools in particular in postmodern pluralistic societies. Nonetheless, I agree with those who state that Jesuit schools are no longer custodial institutions in many places. Michael Buckley explains the concept as follows:

[Catholic schools and universities] transmitted a teaching, the common teaching of the magisterium [of the Catholic church], and this body of doctrine or creedal affiliation afforded a criterion by which faculty was selected, curriculum chosen, and morals enforced. The purpose of these universities [and schools] was the formation of faithful, catechetically orthodox Catholics.

Those universities and colleges [and schools] were “Catholic” because their elements were Catholic: Their teachers were clerical, often religious.

under vows, with Catholic laymen and laywomen added as clerics lacked
specialized education; their students were Catholic, frequently from families
concerned that the faith of young adults be safeguarded; their textbooks and
libraries were vetted, often ecclesiastically censored.15

The State is also responsible for growing external influence on what Grace
calls the framing regime in schools. There are official curricula whose application
is closely monitored by local, state-level, and national boards of education, and
the phenomenon of standardized tests is rampant.16

Also, modernity and post-modernity, each one with its own ideological
contours, have claimed for a long time that scientific investigation and education
need to have academic freedom in order to accomplish their goals. It is important
to maintain the defining orientation of educational institutions toward open
inquiry and free discussion in a setting where all forms of human knowledge have
a place.


16 “Standardized education reform has managed public education like a machine. The rich
diversity of urban classrooms and communities has been flattened by the imposed uniformity of
curriculum content, one-size-fits-all literacy programs, strangulating testing regimes, and, in some
American states, enforced elimination of bilingual instruction.” Andy Hargreaves and Dean Fink,
*Sustainable Leadership* (San Francisco: Jossey-Bass, 2006), 166.

In many countries, private schools in general and Jesuit schools in particular also have to comply
with standardized curricula and testing in order to receive governmental accreditation. Moreover,
in Brazil, for example, access to colleges and universities takes place exclusively through entrance
examinations, which in theory offer equal opportunity to all those who can produce a high-school
diploma. As a matter of fact however, applicants with the stronger academic background that most
private schools can offer—and Jesuit schools tend to be among the best private schools wherever
they are located—have better chances. That is why Jesuit K-12 schools in Brazil need to be able to
show good records of college admittance among their graduates if they want to remain competitive
and attractive to the most motivated students, whose families furthermore can afford the high costs
of tuition that good education generally entails.
1.B.3 – Challenge 3: Conflicting Educational Philosophies

Education in general is under pressure that comes from mixed, competing, and sometimes contradictory educational philosophies, while schools can barely resist the demands of competitiveness for students in the marketplace and the temptation of giving in to educational ideologies that foster the process of commodification of education. This is not a new challenge either. In 1998, the Sacred Congregation for Catholic Education published the document *The Catholic School on the Threshold of the Third Millenium* in which it acknowledged that it perceived a changed relation between many families and Catholic educational institutions. It perceived indeed the emergence of a secular and utilitarian attitude to such schooling. “What is in fact required of the Catholic school is a certificate of studies or quality instruction and training for employment.”\(^{17}\)

However, Catholic schools in general and Jesuit schools in particular have always fostered an educational philosophy that is not limited to the transmission of knowledge. The traditional characterization of such an educational philosophy speaks of formation of character. More contemporary translations of the same ideal point to the goal of integral education of the human person for the common good.

Lastly, another challenge for Jesuit schools refers to the process of constant discernment about the surrounding culture in which Jesuit education is imbedded. “[Jesuit schools and their leaders] have to make crucial decisions about

\(^{17}\) Cited in Grace, *Catholic Schools*, 139.
which aspects of the spirit of the world they can legitimately accommodate and which ones they must be clearly against.” It is indeed challenging to nurture certain characteristics of Jesuit education in the youth when there is abundant pressure for secularism, hedonism and materialism, or to educate toward community, solidarity and the common good in the face of the imperialism of market values and competitive individualism.

1.B.4 – The Rationale of Forming for Partnership in Mission

I turn now to the explanation of the rationale for the general hypothesis of the dissertation. Forming partners in education to share in the common mission of Jesuit educational institutions happens best when Jesuit schools rely on their educational philosophy as it rises from the Spiritual Exercises of St. Ignatius of Loyola. This is the source of the pedagogical premises, processes and practices and the reason of the successful history of Jesuit education since the foundation of the Society of Jesus in 1540. The dissertation argues that the best way for Jesuit schools to remain faithful to their mission in education is through an intentional formation effort that actively engages educators as partners in mission. The rationale to support such claim comes from the Spiritual Exercises of St. Ignatius of Loyola, which provides Ignatian-inspired educators to this day with a mindset or frame of reference to discern the concrete features of the mission of Jesuit schools in the variety of “circumstances of times, places, persons and other such

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18 Ibid., 22.
19 Cf. ibid., 236-237.
factors taken into account,”20 wherever Jesuit education takes place. In the dissertation, Ignatian is the term I use to refer to the experience, wisdom, and charisma of St. Ignatius of Loyola, whereas the word Jesuit has a more institutional connotation, that is to say, a connection to the Jesuit order or Society of Jesus.

Lastly, the goal of forming educators to be partners in mission entails that the mission of Jesuit schools is actually a common mission. My understanding of the expression common mission is threefold: 1) it is the common-ground educational mission of Jesuit schools to be fostered by Jesuits and others—non-Jesuits—in partnership, and as the mission is defined by the official documents of the Society of Jesus; 2) also, the expression “common mission” speaks of an effort to foster mutual collaboration, according to which Jesuits collaborate in the mission that lay people have in Jesuit schools, and lay educators and others collaborate in the mission of the Jesuits who have been assigned to work at a given school by their religious superiors; and 3) common mission happens when the members of a local educational community, for example a Jesuit K-12 school or a Jesuit college, know and embrace the mission of the school for themselves. When the goal is to form co-authors and stakeholders of any given mission, it is expected that this mission will be embraced and creatively transformed, adapted

20 Ignatius of Loyola, “Part IV: The Instruction of Those Who Are Retained in the Society, in Learning and in Other Means of Helping Their Fellowmen: Chapter 5 – The Subjects which the Scholastics of the Society Should Study [351],” in George E. Ganss, S.J., The Constitutions, 188. The expression “circumstances of times, persons and places” is used by Ignatius in several passages of the Constitutions. It usually follows a series of thorough and detailed instructions about a given point. Ignatius believes that the superiors need to provide their subjects with a clear sense of purpose and mission. However, Ignatius trusts the obedient subjects who are better placed than their distant superiors to discern what to do in the concreteness of the place to which they have been assigned.
and reinvented by those stakeholders. After all, it would not be coherent with the Jesuit tradition of education to foster a model of formation for educators of Jesuit schools whose goal would be to train people to repeat what has been done in the past or to train non-Jesuits only to do what Jesuits would have done if they were still able to staff their educational institutions.

In sum, the dissertation’s hypothesis and answer to the general research question is that it is necessary to break open the educational philosophy of the *Spiritual Exercises of St. Ignatius of Loyola* in order to share the mission of the Jesuit tradition in education. This underlying thesis is derivative of the same *Spiritual Exercises*, whose educational philosophy in general translates into the realm of the mission of Jesuit schools in particular by fostering the formation of partners in mission.

**1.C: The Jesuits and Education**

In this section, I explore some of the history of the Society of Jesus, especially its commitment to education. I also explain why the SE were conceived with an underlying educational philosophy. It is Ignatius himself who uses an educational metaphor to talk about his first experiences in understanding how God was at work in his life, forming him to become a partner in the mission of Jesus Christ: “God treated [me] at this time just as a schoolmaster treats a child whom [God] is teaching. . . . Indeed if he were to doubt this, he thought he would offend His divine majesty.”

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21 Ibid., *The Autobiography of St. Ignatius of Loyola*, translated by Joseph O’Callaghan (New York: Fordham University Press, 1992), 37. Since the *Autobiography* was dictated to Fr. Câmara,
transformed it into guidelines for others to make a thirty-day retreat and become partners in the mission of Jesus Christ, Ignatius also developed what I call an educational philosophy.

The Jesuit order or Society of Jesus was officially approved by Pope Paul III on September 27, 1540 in the Bull (Apostolic Letter) *Regimini Militantis Ecclesiae*. In 1548, in Messina, in contemporary Italy, the Jesuits opened their first school. Life in Europe underwent important cultural shifts at that time, especially from the late fifteenth century, when the Renaissance mindset replaced the Middle-Ages one. It was a time of great optimism, and the discovery of the Americas and new maritime routes to East Africa and Asia flooded European countries with goods, enthusiasm and an industrious mentality.

When the Society of Jesus came into being formally, Ignatius of Loyola had already been elected the first superior general of the Jesuits in 1539. Ignatius’s primary mission then was to write the *Constitutions* of the newly-founded Catholic religious order. The Benedictines, the Carthusians, the Franciscans and the Dominicans, among other vowed religious communities, had their own charters and rules, but Ignatius understood that none of those would suit the lifestyle that he had envisioned for his Companions of Jesus. Ignatius wanted the Society to be a small group of itinerant missionaries whose lifestyle would be modeled after the characteristics of the apostolic activities of St. Paul and the apostles. Accordingly, Jesuits should be mobile and travel constantly, preach the Word of God, form or reform church communities, parishes, dioceses,
monasteries and entire villages in some cases, and help souls to find their way to
God through conversion, amendment and reformation of life.

Whoever desires to serve as a soldier of God beneath the banner of the
cross in our Society, which we desire to be designated by the name of Jesus,
and to serve the Lord alone and the Church, His spouse, under the Roman
pontiff, the Vicar of Christ on earth, should, after a solemn vow of perpetual
chastity, poverty, and obedience, keep what follows in mind. He is a member
of a Society founded chiefly for this purpose: to strive especially for the
defense and propagation of the faith and for the progress of souls in Christian
life and doctrine, by means of public preaching, lectures, and any other
ministration whatsoever of the Word of God, and further by means of the
Spiritual Exercises, the education of children and unlettered persons in
Christianity, and the spiritual consolation of Christ’s faithful through hearing
confessions and administering the other sacraments. Moreover, this Society
should show itself no less useful in reconciling the estranged, in holily
assisting and serving those who are found in prisons or hospitals, and indeed
in performing any other work of charity, according to what will seem
expedient for the glory of God and the common good.\(^{22}\)

Very soon did Ignatius realize that the Society would need houses in
which men who were considering a Jesuit vocation would be able to receive the
necessary training before being ordained to the priesthood. This is the original
idea behind the foundation of Jesuit colleges and universities, as these educational
institutions are referred to in the \textit{Constitutions} (1.C.1). Moreover, Ignatius was a
man of his time, and Renaissance Europe was going through a true revolution in
its appreciation of formal education (1.C.2). Thirdly, Ignatius could draw on his
own experience when he became committed to a well-rounded education for
future Jesuits and non-Jesuits, which became to this day one of the central works
of the Jesuit order (1.C.3).

1.C.1 – In the *Constitutions*

Concerning the education of future Jesuits, Ignatius wrote in the *Constitutions* that:

> The aim which the Society of Jesus directly seeks is to aid its own members and their fellowmen to attain the ultimate end for which they were created. To achieve this purpose, in addition to the example of one’s life, learning and a method of expounding it are also necessary. Therefore, after the proper foundation of abnegation of themselves is seen to be present in those who were admitted and also the required progress in virtues, it will be necessary to provide for the edifice of their learning and the manner of employing it, that these may be aids toward better knowledge and service of God, Creator and Lord.

Toward achieving this purpose the Society takes charge of the colleges and also of some universities, that in them those who prove themselves worthy in the houses but have entered the Society unequipped with the necessary learning may receive instruction in it and in other means of helping souls.  

> Although Ignatius envisioned colleges and universities for the formation of those men who would have been admitted to the Society, the first school founded in Messina in 1548 was for lay students who were not necessarily thinking about joining the Jesuit order. The foundation of that school changed Ignatius’ understanding of the mission of the Society of Jesus, and imprinted an indelible mark on the history of Jesuit apostolate. It inaugurated the Jesuit tradition in education.

Ever since the early origins of Jesuit education, a common trait is present in both types of Jesuit educational institutions, namely, the colleges and universities accounted for in the *Constitutions* for the formation of recently admitted (“retained”) Jesuits, and the schools for lay students such as the one

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founded in Messina in 1548. That common trait was learning in order to serve better. Education was looked at as an important means for those who wanted to help souls achieve their ultimate purpose in life. Jesuits study to serve better, and Jesuits have schools to help Jesuits and others serve better according to the way of life of each one. This common trait is not exclusive to the Jesuit approach to education by any means. But it has been a major inspirational feature of what I call the Jesuit tradition in education.

1.C.2 – European Renaissance and Humanism

The connection between education and the betterment of people’s ability to be good citizens and serve their neighbors and societies in general—and to be good Jesuits in particular—is a classic correlation. The tradition of erudition has not been foreign to the philosophical and theological endeavors of the Church either. Since the very beginning, early Christians were involved in many intellectual controversies because of the Greco-Roman culture of first-century-C.E. Palestine, Middle-East and Europe. As a matter of fact, as early as the time when the book of the Acts of the Apostles was written—around the years 75-80 C.E.—St. Paul had already been treated with contempt by some Athenians gathered to listen to him at the Areopagus.24 In the history of the Church, some Christians and even Christian intellectuals may have shown doubt about the mutually beneficial alliance between education and culture on the one hand, and faith and apostolate on the other. Tertulian’s (140-230 C.E.) claim that “Jerusalem has no need for Athens” is a good example of that tendency. However, there is

overwhelming evidence that the Church quickly understood that the Christian faith would not be received outside of the Jewish-inspired culture unless other intellectual traditions and cultures were effectively engaged in dialogue by Christian missionaries. In other words, the Church has always seen deep correlation between faith and reason, revelation and education, all integral to the work of salvation. Pope John Paul II summarized the Church’s understanding of and hope for the history of the faith-and-reason relationship when he wrote that: “[There is] fundamental harmony between the knowledge of faith and the knowledge of philosophy [...]. Faith asks that its object be understood with the help of reason; and at the summit of its searching reason acknowledges that it cannot do without what faith presents.”

Therefore, the interest that Ignatius showed toward the educational apostolate drew on ancient tradition, but also on the European Renaissance momentum and humanist movement of his days. What distinguishes the sixteenth-century mentality in which Ignatius is imbedded is a reaction against a certain medieval theological scholasticism that had become alas too abstract.

The belief in a relationship between learning and effective ministry that underlay [Ignatius’s interest in education in order to help souls] was traditional. Nonetheless, Ignatius was born into an age in which arguments for that relationship and, indeed, for an intrinsic relationship between education and an upright life had been propounded with new insistence and from a new viewpoint. That a relationship existed between “good literature” and virtue was a propelling assumption of the humanist movement.

In the sixteenth century, the humanists promoted one of the great revolutions in education in the western world when they rehabilitated the

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educational wisdom of the Classics of pre-Christian era, namely, Greek and Roman authors who promoted a view of education that related learning to a life of virtue and public service. Education is therefore a spiritual endeavor and a work of salvation. Drawing on that rich humanist tradition, the Church in general and the Jesuits in particular understood their educational mission as an opportunity to train people to live their lives to benefit society. Such a framework for the educational apostolate is present even in recent documents such as the Vatican II (1962-1965) *Declaration on Christian Education, Gravissimum Educationis*, which states that “conscious of their vocation [Christians27] should learn to give witness to the hope that is in them (cf. 1 Pet. 3:15) and to promote the Christian concept of the world whereby the natural values, assimilated [through education] into the full understanding of [woman and] man redeemed by Christ, may contribute to the good of society as a whole.”28 The humanist tradition embraced by the Church in general and the Society of Jesus in particular points to the importance of receiving from the secular culture and sciences what is authentically human as a contribution for women and men to achieve their ultimate potential and vocation. “The first rule of education is to foster those fundamental dispositions [rooted in human nature, yet in need to be carefully cultivated, which are love of truth and love of good and justice through the various areas of human knowledge] which enables the students to grow in the life

27 The term is used here because Vatican II writes for Catholic educational institutions and assumes that their students are all Christians.

of the mind.”

The humanist tradition of education fosters unity among the intellectual, cognitive, spiritual, moral and socially transformative dimensions of the human person.

What has been exposed so far explains why Ignatius’s vision for the Society of Jesus was that of a band of educated men in constant pilgrimage around the world in order to help souls. More specifically, Ignatius thought that the most important means for Jesuits to help souls were twofold: the ministries of the Word or the preaching of the Gospel in various ways, including catechesis; and spiritual guidance through the SE, confessions and the other sacraments, besides the various works of charity. All required education. The unfolding drama of plays, both comic and tragic, poems and oratory pieces, besides philosophy and theology, made the warp and woof of the fabric of the curriculum of Jesuit educational institutions and were designed to capture the imagination of the youth. Moreover, they turned the students into the best possible citizens they could be or the apt missionaries that the recently-founded religious order needed for its growing opportunities and responsibilities in the various parts of the world where Jesuits were sent forth. In sum, Jesuits have worked in education in order to form people in letters and virtue. More precisely, to form in letters that shape the spirit in values and move the will to serve others.

1.C.3 – The Spiritual Experience of Ignatius of Loyola

Ignatius’s commitment to education comes from his own spiritual journey in the first place. It is Ignatius himself who describes his spiritual insights with an

educational analogy. In the *Autobiography*, he dictated to Fr. Luis Gonçalves da Câmara the part of his life that occurred after his conversion, and which eventually led him to found the Jesuits. One of the most famous episodes in the life of the future founder of the Society of Jesus takes place in the aftermath of a battle between the French and the Spanish in the region of Navarre—northern Spain—in 1521. Ignatius was wounded during that battle, which demoralized and irreparably dismantled the already largely outnumbered and weak Spanish resistance. The outcome could not have been other than the immediate surrender of the Spanish army. In recognition for his bravery, Ignatius was taken to the castle of his family in Loyola, Azpeitia, in the Basque region of contemporary Spain, by some of the same French soldiers who had just taken over the Spanish citadel.

From May 1521—February 1522, Ignatius was practically confined to his bed in Loyola, while recovering from war injuries and the consequent several surgeries and other medical interventions to fix broken bones in his legs. In the absence of other entertainment possibilities, he read two books that altered his entire life. The first one was *The Life of Christ* by a German Carthusian, Ludolph of Saxony. The second was a collection of the lives of saints whose title was *The Golden Legend*, written by a thirteenth-century Dominican writer, Jacopo de Voragine. It is customary to refer to this period as the conversion of St. Ignatius. In the *Autobiography*, Fr. Câmara added a marginal note to Ignatius’s narrative in which he stated that those readings were the occasion for Ignatius’s first understanding of how God stirs up courage and strength in those who make
progress in God’s service. Ignatius himself referred to the experience that he had from reading those books as follows:

As he read them over many times, he became rather fond of what he found written there. Putting his reading aside, he sometimes stopped to think about the things he had read and at other times about the things of the world that he used to think about before. Of the many vain things that presented themselves to him, one took such hold on his heart that he was absorbed in thinking about it for two or three or four hours without realizing it: he imagined what he would do in the service of a certain lady, the means he would take so he could go to the country where she lived, the verses, the words he would say to her, the deeds of arms he would do in her service. . . .

Nevertheless, Our Lord assisted him causing other thoughts that arose from the things he read to follow these. While reading the life of Our Lord and of the saints, he stopped to think, reasoning with himself, “What if I should do what St. Francis did, what St. Dominic did?” So he pondered over many things that he found to be good, always proposing to himself what was difficult and serious, and as he proposed them, they seemed to him easy to accomplish. . . . These thoughts also lasted a good while, but when other matters intervened, the worldly thoughts mentioned above returned, and he also spent much time on them. . . .

Yet there was a difference. When he was thinking about the things of the world, he took much delight in them, but afterwards, when he was tired and put them aside, he found that he was dry and discontented. But when he thought of going to Jerusalem, barefoot and eating nothing but herbs and undergoing all the other rigors that he saw the saints had endured, not only was he consoled when he had these thoughts, but even after putting them aside, he remained content and happy. He did not wonder, however, at this; nor did he stop to ponder the difference until one time his eyes were opened a little and he began to marvel at the difference and to reflect upon it, realizing from experience that some thoughts left him sad and others happy. Little by little he came to recognize the difference between the spirits that agitated him, one from the demon, the other from God.30

This is the seed of the educational philosophy of the SE, namely to reflect on life and to weigh critically with discernment one’s deep desires and how they operate within a person. Later on in his life, when writing down his spiritual insights to compose the book of the SE, Ignatius made of this central experience

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the bone marrow of the process of spiritual discernment, which in turn leads all who make the SE into deciding (“electing”) how they are going to be partners in the mission and share in the common mission of Jesus Christ (see Chapter Five). Ignatius used the term “motion” to refer to such inspiring and action-driven desires. Motions are feelings, ideas or inclinations that make someone make decisions in a certain direction. George Ganss explains that motion is “Ignatius’s technical term, taken from scholasticism, to designate the interior experiences, such as thoughts, impulses, inclinations, urges, moods, consolations, desolations, and the like.”31. People’s individual weighing and responding to those desires are actually the discovery of one’s call, vocation or purpose in life.

Ignatius’s basic insight is relevant for the general hypothesis of the dissertation because the first task of those who are to become partners in mission is to be attentive to and reflective about their own deepest desires. Consequently, programs that aim at forming partners in the mission of Jesuit schools are to take this first task into account. Of chief importance among people’s desires are those that enhance their potential and make them feel a sense of accomplishment and fulfillment in life. In Ignatius’s terms, it is what “takes hold on one’s heart” the strongest and for the longest time that is the key to the election process, according to which those who are being formed into partnership in mission engage in appropriating for themselves the mission to which they are exposed and invited.

In the book of the SE, that mission is the one of Jesus Christ. In the dissertation, it is the common mission of Jesuit education. Therefore, first and

foremost, programs that aim at forming partners in education to share in the common mission of Jesuit schools need to form people into becoming attentive to and reflective about their own sense of call, vocation and purpose in life.

Ignatius felt the motion to dedicate himself to serious studies only a little later though. It was derivative of his desire to help souls. After his conversion experience during the months of convalescence in Loyola, Ignatius first elected a lifestyle of mendicant and itinerant preacher in Jerusalem. He actually went to visit the Holy City in 1523, but was prevented from staying there by the guardians of the sanctuaries. Ignatius spoke about this new discernment in his Autobiography: “After the pilgrim realized that it was not God’s will that he remain in Jerusalem, he continually pondered within himself what he ought to do. At last he inclined more to study for some time so he would be able to help souls, and he decided to go to Barcelona.” This is the moment in the life of Ignatius of Loyola that sowed the seeds of the future commitment to education of the Society of Jesus.

When Ignatius died in 1556, the Society had around 35 institutions of formal education of five different types: 1) there were houses in which Jesuits in training lived after they had been accepted (“retained”) at the end of a two-year period in the Novitiate. Although they had already professed perpetual vows of poverty, chastity and obedience, they were not yet fully incorporated in the Jesuit order. They were called scholastics—and still are to this day—, lived in those

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32 Inclinations or desires come from the strongest motions and are the theological locus of the discernment, besides being one of the operative principles of the educational philosophy that rises from the SE.

colleges, and went out everyday to listen to lectures (have classes) elsewhere; 2) there were houses similar to the first ones, but in which the scholastics did attend lectures; 3) there were colleges similar to a contemporary all-boys Jesuit high school for lay students, e.g., Boston College High School; 4) the Roman College, which was a residence for only non-Jesuit seminarians, and 5) boarding schools for lay students.  

1.D – The Structure of the Dissertation

In closing Chapter One, I lay out the structure of the dissertation and the content of the next chapters. Chapter Two looks at the preliminary annotations that are found in the beginning of the book of the SE. The educational philosophy of what ended up being the tenets of Ignatian pedagogy in the Jesuit tradition of education can be discerned in those introductory remarks. Then, I develop the three major components of the dissertation in chapters three, four and five, which correspond to the main structure of the dissertation.

Chapter Three focuses on the sense of vocation and mission in life in general and professional life in particular. I argue that programs that aim at forming partners in education who share in the common mission of Jesuit schools are to help educators bring their lives to their professions and their professions to their lives. This means that educators are to be formed into discovering their own sense of vocation and mission as persons in the world and as professionals at the schools where they work.

In Chapter Four, the second component of the structure of the dissertation addresses the broader inspirational vision that has characterized Jesuit education throughout the centuries. I argue that formation programs need to expose educators to what the Society of Jesus says about its educational mission. Disclosure of such tradition in education comes after they have realized who they are and what they feel called to accomplish with their professional lives.

Chapter Five puts the two previous chapters in conversation. The third component of the structure of the dissertation states that formation programs are to help educators discern how they see themselves embrace the mission of Jesuit schools as partners and collaborators in mission. Moreover, educators need to see how they can foster that mission as co-agents and how they can become co-authors of the mission by appropriating it and expressing it for themselves.

The three major components of the dissertation correspond to the three movements of the SE, which are: 1) self-knowledge and consciousness (Chapter 3 of the dissertation); 2) invitation to serve a cause (Chapter 4); and 3) discernment or election about one’s particular way and commitment to serving that cause (Chapter 5). In the SE, the final result of the discernment process comes out of the existential conversation or discernment between one’s awareness of one’s own reality on the one hand, and the goals of Jesus’ mission on the other. Therefore, I argue that the best way to form educators to become partners in education and to share in the common mission of Jesuit schools is to follow the same methodology of the SE. In the dissertation, the SE are looked at first and foremost as a formation program to form partners in mission. It can be argued that the primary
goal of the SE is to form deeply committed disciples of Jesus Christ to serve the Reign of God in the Catholic church and for the life of the world. However, in the dissertation, I look at St. Ignatius of Loyola’s major contribution to Christian spirituality and the history of Church education as a source of four operative principles to form partners in education who share in the common mission of Jesuit educational institutions. Another equally relevant claim of the dissertation is that the educational philosophy of the SE is what gave rise to the main characteristics of Jesuit education. Therefore, the SE are the source not only of a model for educators in Jesuit schools to practice Ignatian-inspired education—in the classroom for instance—but also the source of the model for Jesuit schools to form partners in education to share in the common practices, processes and premises of the mission of Jesuit schools. When Jesuit schools are successful in breaking open the educational wisdom of the SE, they are also successful in breaking open the responsibility to foster the mission of Jesuit education. Formation programs that are based on those assumptions are the most hopeful way to prepare for the challenges that Jesuit schools face today in order to remain faithful to the distinctive mission that has characterized Jesuit education for almost five hundred years.

Therefore, the four operative principles that need to be present in formation programs for educators who will share in the common mission of Jesuit schools are: Discernment, Desire, Diakonia, and Decision.

Discernment is the all-encompassing operative principle and spiritual dynamic of the SE. Ignatius wants to form men and women who can discern for
themselves their own paths in life. Discernment is a critical tenet of the educational philosophy that rises from the SE and, as Chapter 2 shows, is the pedagogical premise that allows the three other operative principles to unfold.35

Desire as an operative principle is derivative of the first movement of the SE (Chapter 3). First and foremost, educators are to be invited to embrace their own vocation as persons and professionals.

*Diakonia* is the Greek work for service. The Jesuit tradition in education has always been characterized as service to others, and the Jesuits became involved in education to serve others or help souls. More recently, one way of summarizing the mission of Jesuit schools is Fr. Arrupe’s phrase: “to form men and women for others”.

Moreover, the second movement of the SE (Chapter 4) explores the main documents of the Jesuit tradition in education. It argues that the third operative principle for programs that aim to form partners in education to share in the common mission of Jesuit schools calls for inspiring educators toward the mystique of education understood as a discerned service (*diakonia*) to others.

Lastly, the fourth operative principle is Decision, which translates the Ignatian term “election” (Chapter 5). Programs to form partners in education to share in the common mission of Jesuit educational institutions need to empower educators to decide and choose for themselves, as the result of a discerning process, where their own desires meet the mission of Jesuit education.

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35 Discernment and critical share the same etymological root, which is the Greek verb *krinein*. Therefore, what is called discernment in the field of spirituality becomes critical reflection for the purpose of this dissertation.
Chapter 2 – Some Pedagogical Premises: The Annotations of the Spiritual Exercises

The educational philosophy embedded in the Annotations, which is the introductory section of the book of the SE, draws on two pedagogical premises. The first of them is the understanding of the retreatants or learners as partners with their spiritual director—identity of the learners or the “Who is the learner?” question. The second premise is active-learning—the understanding of the learners as agents or the “How does learning happen?” question. The Annotations then actively engage the exercitants in the learning process of the SE and look at the retreatants as agent-subjects of the mission to be embraced for themselves out of their own discernment and choice.

In this chapter, firstly I present the nature of the Annotations (2.1). Secondly, I show the educational goals of the Annotations (2.2). I also review some of the contemporary research in adult education focusing on how it concurs with the educational philosophy that rises from the Annotations (2.3). Following on, I discuss what two developmental theories have to say about the learners’ ability to make meaning of their educational experiences. The understanding of developmental theories is collaborative because the educational philosophy embedded in the Annotations relies on the ability of the retreatants to discern and appropriate for themselves the learning process of the SE (2.4).

Ignatius of Loyola conceived the SE as guidelines for a thirty-day-long retreat. However, their under-girding dynamic reflects a pedagogy as well, which is an active and participative way of “educating” people along their faith and life.
journey. This dissertation reads the SE as a source of operative principles for a formation program for disciples of Jesus Christ to become partners in the mission of the Church. I contend that Ignatius of Loyola chose a formation path toward partnership that uses active-learning techniques which bring together content assimilation and meaning-making activities. Moreover, Ignatius knew that adult learners, who are the primary clientele of the SE, learn best when looked at not as passive recipients of knowledge but as partners and co-agents of their formation experience. This kind of learning happens best through personal assimilation of the content, which encompasses cognitive and existential learning.

People learn best when they are guided through a three-step learning process that makes them know: 1) what has been passed on to them (What does it say?); 2) what the content means to them (What does it say to me?); and 3) which possibilities and choices are opened by what has been passed on to them (What does it invite me to do?). In other words, learning has to do not only with content assimilation, but also with content accommodation or appropriation and content application, namely, content that is put into action. In the SE specifically, it is spiritual wisdom which is to be put to action. Therefore, the two main characteristics of the educational philosophy as it rises from the Annotations of the SE are active-learning approaches and meaning-making activities on the one hand, and invitation to become partners and agent-subjects in the learning process on the other.

Ignatius’s approach to adult formation in the Annotations aptly fits the focus of this dissertation, which is the formation of educators to share in the
common mission of Jesuit schools. As a matter of fact, my research is not primarily about teaching new skills or improving knowledge about the Jesuit tradition in education. Rather, I propose four operative principles that answer the question about how to invite educators to join in the mission of Jesuit schools as partners, and how to effectively form them to become co-authors of the common mission of those schools. Likewise, the Annotations go beyond training disciples of Jesus or informing them about the mission of the Church, and look at the exercitants as partners of that mission. Therefore, the Annotations allow me to illustrate how active-learning works together with a specific understanding of who learners are. But before showing how Ignatius turns those pedagogical premises into educational goals, I will explain the nature of the Annotations of the SE.

**2.1 – The Nature of the Annotations of the SE**

The book of the SE was conceived as a manual of practical guidelines for those directing a thirty-day retreat. The retreat is based on prayerful deliberation which leads retreatants or exercitants to discover and embrace their own way of cooperation with God’s loving and active presence in their own lives in particular and in the Catholic church in general for a better world for all. At the threshold of the experience of the SE, Ignatius wrote twenty Annotations, which are introductory explanations for both the directors and the exercitants. Some of those Annotations are chiefly targeted toward the former, whereas others are to be communicated to the latter before the actual beginning of the thirty-day retreat.¹

¹ Thirty days is the normal length for the completion of the experience of the SE.
Ignatius’s first words in the SE are: “Introductory explanations to gain some understanding of the Spiritual Exercises which follow, and to aid both the one who gives them and the one to receive them.”\(^2\) The goals of those explanations—I favor the term Annotations\(^3\)—are: 1) to disclose the process that lies ahead for both the director of the SE and the exercitants; 2) to give them an explanation of some expressions used by Ignatius in the text; and 3) to enable them to successfully deal with the dynamics that unfold during the retreat. Ignatius calls those dynamics “motions.” Actually, in the Annotations, Ignatius lays down the foundations of *discernment* as an operative principle of the SE in formation programs toward partnership in mission. The SE form people who can discern and personally embrace the formative and educational intent of the whole process.

In the Annotations, Ignatius exposes both the directors and the retreatants to a method which he draws from his own spiritual experience and the education he received after his conversion in Loyola.\(^4\) Ganss explains that:

> These introductory explanations elucidate the nature and purpose of the Exercises (1); the procedure in general (2-3); their division and duration (4); the basic dispositions required in the exercitant (5); the director’s dealings with the exercitant in his or her most vital experiences (6-17); the adaptations of the Exercises to different classes of retreatants (18-20).

Explanations 3,5,11,12,13,16,20 deal with the exercitant’s dispositions, and 1,2,4,6-10,14,15,17,18,19 are addressed chiefly to directors.\(^5\)

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\(^3\) See Chapter 1 – Introduction, footnote 3.

\(^4\) Ignatius formal education took place chiefly at the University of Paris. He received his Masters of Arts degree in April of 1534. O’Malley explains that what the *modus parisiensis* or the French system of education “gave to the Jesuit system was an organized plan for the progress of the student through increasingly complex materials and a codification of pedagogical techniques designed to elicit *active response from the learner.*” John W. O’Malley, *The First Jesuits*, 217 (emphasis added).
In the words of Ignatius: “The initial Annotations may be shown, and this can be more helpful than not.” Moreover, when Ignatius supervised other Jesuits who gave the SE, he would instruct them on how to proceed about the different tasks that are required of the director of the SE. That is how the Directory Dictated to Father Juan Alonso de Vitoria (circa 1555), for example, came to existence. Ignatius’s instructions concerning the Annotations in that directory read that

the director, after himself carefully examining the twenty guidelines that are placed at the front of the Exercises for the instruction of the one giving them, should give the exercitant four of the guidelines contained there, in the following order: Annotations 1, 20 (either entire or whatever part he judges suitable), 5, and 4.


Lastly, the Official Directory of 1599 concurs with the overall goals to which the earlier directories refer when it comes to explain the Annotations to the exercitants:

Other instructions which the exercitant needs to be given are contained in the Annotations and rules printed in the book of the Exercises and so there is no reason for repeating them here. This much, however, should be said about them: the exercitant must devote the greatest diligence to observing these instructions, for the more fully he does so the sooner and the more abundantly will he find the spiritual fruit which he seeks.

When the exercitant arrives in the place for his retreat, the director should visit him that same day. Before giving him the [Principle and] Foundation, he should explain to him some of the Annotations: 1, 5, the admonition in 17.

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5 George E. Ganss, The Spiritual Exercises, 143. See Appendix 2 for the complete text of the twenty Annotations.
about opening his heart, and in 20 about the importance of retirement to a secluded place. This will afford the director an opportunity to give the exercitant the instruction which we said above in chapter 2 ought to be given him.⁸ He should do this, however, with the tact also mentioned there, and not say everything to the exercitant at once but only as much as prudence dictates.⁹

Although different directories indicate different numbers and vary the order in which the Annotations are to be communicated to the retreatants, the goal is to assure that the exercitants will take the SE for their own advancement “with a spirit of generosity, of desire for great progress in spiritual things, and of great confidence in God’s goodness.”¹⁰ In order to achieve such goals, Ignatius has the directors of the SE share with the exercitants the same information available to themselves.

2.2 – The Three Educational Goals of the Annotations: Learning Community, Active Learning, and Discernment

The purpose the Annotations want to achieve is threefold. The first educational goal of Ignatius is the creation of a learning community of two persons, namely, the director of the SE and the exercitant. Therefore, the educational philosophy as it rises from the Annotations does not allow for self-induced learning. This can come as a surprise because we know from his Autobiography that Ignatius did not have any mentors in his first understanding of spiritual things. Ignatius uses the image of God who teaches him directly as schoolmasters do with their pupils. However, during the SE, that direct

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⁸ The title of Chapter 2 of this Directory is “Dispositions which the Exercitant Should Bring to the Exercises.”
relationship with God from which Ignatius benefited in Loyola becomes the relationship between God and the exercitants which is coached by the one who gives the SE. Several Annotations clarify the nature of the relationship between the director and the exercitant besides the role of the former during the SE.

The person who gives to another the method and procedure for meditating or contemplating should accurately narrate the history contained in the contemplation or meditation, going over the points with only a brief and summary explanation. For in this way the person who is contemplating, by taking this history as the authentic foundation, and reflecting on it and reasoning about it for oneself, can thus discover something that will bring better understanding or a more personalized concept of the history—either through one’s own reasoning or insofar as the understanding is enlightened by God’s grace. This brings more spiritual relish and spiritual fruit than if the one giving the Exercises had lengthily explained and amplified the meaning of the history. For what fills and satisfies the soul consists, not in knowing much, but in our understanding the realities profoundly and in savoring them interiorly [Annotation 2, emphasis added].

It is very advantageous that the one who is giving the Exercises, without wishing to ask about or know the exercitant’s personal thoughts or sins, should be faithfully informed about the various agitations and thoughts which the different spirits stir up in the retreatant. For then, in accordance with the person’s greater or lesser progress, the director will be able to communicate spiritual exercises adapted to the needs of the person who is agitated this way [Annotation 17, emphasis added].

The one giving the Exercises should not urge the one receiving them toward poverty or any other promise more than toward their opposites, or to one state or manner of living more than to another. [...] During these Spiritual Exercises when a person is seeking God’s will, it is more appropriate and far better that the Creator and Lord himself should communicate himself to the devout soul, embracing it in love and praise, and disposing it for the way which will enable the soul to serve him better in the future. Accordingly, the one giving the Exercises ought not to lean or incline in either direction but rather, while standing by like the pointer of a scale in equilibrium, to allow the Creator to deal immediately with the creature and the creature with its Creator and Lord [Annotation 15, emphasis added].

11 In Ignatian spirituality, the “various agitations and thoughts” constitute the raw material for the retreatants to work with during their on-going discernment about God’s will in their lives. It is noticeable that Ignatius wants directors to be coaches, but cautions them not to become mentors, for the main drama must take place in the direct relationship between God and the exercitant.
The second educational goal is active learning. Ignatius wants the retreatants to learn through reflection on their own experience. Only the actual spiritual exercises will allow the exercitants to learn for themselves. In the first annotation, therefore, Ignatius explains that the SE are spiritual activities or prayerful practices that the retreatants will put to work during the thirty-day retreat. Drawing directly on the daily experience of the exercitants, Ignatius then mentions physical exercises such as taking a walk, traveling on foot and running as activities which are analogous to the idea that he wants to convey with the expression “spiritual exercises”.

By the term Spiritual Exercises we mean every method of examination of conscience, meditation, contemplation, vocal and mental prayer, and other spiritual activities, such as will be mentioned later. For, just as taking a walk, traveling on foot, and running are physical exercises, so is the name of spiritual exercises given to any means of preparing and disposing our soul to rid itself of all its disordered affections and, then, after their removal, of seeking and finding God’s will in the ordering of our life for the salvation of our soul [Annotation 1].

Moreover, Ignatius emphasizes that the initial dispositions of the exercitants are critical to achieve results. The third Annotation is about the various kinds of spiritual exercises, and Annotation five stresses the importance of the retreatants’ personal commitment and active engagement in the journey ahead of them.

In all the following Spiritual Exercises we use the acts of intellect in reasoning and of will in eliciting acts of the affections. In regard to the affective acts which spring from the will we should note that when we are conversing with God our Lord or his saints vocally or mentally, greater
reverence is demanded of us than when we are using the intellect to understand [Annotation 3].

The persons who make the Exercises will benefit greatly by entering upon them with greater spirit and generosity toward their Creator and Lord, and by offering all their desires and freedom to him so that His Divine majesty can make use of their persons and of all they possess in whatsoever way is in accord with his most holy will [Annotation 5, emphasis added].

Lastly, Ignatius wants to achieve the educational goal of forming people who discern. The purpose par excellence of the experience of the SE is to prepare and dispose the exercitants to discern how to order their lives according to God’s will and thus fulfill their vocation. The title Ignatius gives to his book reads indeed: “Spiritual Exercises to overcome oneself, and to order one’s life, without reaching a decision through some disordered affection.”

Ignatius knows that people have aspirations in life, which they often do not achieve because of several obstacles. Ignatius is convinced that many of those obstacles are of a spiritual nature and therefore need to be removed through prayer. The key element to help people remove what is not conducive to achieving their goals in life is discernment of the motions which are caused by different spirits in one person. As a matter of fact, the title that Ignatius gives to

12 Later on in the SE, Ignatius explains what constitutes the characteristics of two chief methods of prayer, namely, meditation and contemplation, which will be the warp and woof of the tapestry of the actual moments (hours) of formal prayer during the thirty-day retreat.

Meditation is a more discursive and mental prayer in order to reason out principles and come to form basic convictions. During a meditation, exercitants use their mental powers of memory, intellect, and will to come to understand the biblical passage or theme they are praying about.

Contemplation is the second basic method of prayer in the SE. It is equally mental, but less discursive. As a matter of fact, exercitants are invited to contemplate various biblical scenes—Ignatius calls them “mysteries” when they refer to the life of Jesus Christ—using their imagination. Therefore, retreatants are to use their imagination to see the characters who take part in the mysteries, listen to what they say, and see what they do in each scene. Such an exercise of gazing at various biblical passages can lead to reflections and even discursive prayer, but the goal here is to allow the exercitants to experience a more personal and affective encounter with the Lord (see Chapter Four).

the rules for the discernment of spirits is: “Rules to aid us toward perceiving and then understanding, at least to some extent, the various motions which are caused in the soul: the good motions that they may be received, and the bad that they may be rejected.” Annotations six through eight comment at length on motions, and Annotation fourteen expands on the concepts of consolation and desolation.

When the one giving the Exercises notices that the exercitant is not experiencing any spiritual motions in his or her soul, such as consolations or desolations, or is not being moved one way or another by the different spirits, the director should question the retreatant much about the Exercises: Whether he or she is making them at the appointed times, how they are being made, and whether the Additional Directives are being diligently observed. The director should ask about each of these items in particular... [Annotation 6].

If the giver of the Exercises sees that the one making them is experiencing desolation and temptation, he or she should not treat the retreatant severely or harshly, but gently and kindly. The director should encourage and strengthen the exercitant for the future, unmask the deceptive tactics of the enemy of our human nature, and help the retreatant to prepare and dispose himself and herself for the consolation which will come [Annotation 7].

According to the need perceived in the exercitant with respect to the desolations and deceptive tactics of the enemy, and also the consolations, the giver of the Exercises may explain to the retreatant the rules of the First and Second Weeks for recognizing the different spirits... [Annotation 8].

If the one giving the Exercises sees that the exercitant is proceeding with consolation and great fervor, he or she should warn the person not to make some promise or vow which is unconsidered or hasty. The more unstable the director sees the exercitant to be, the more earnest should be the forewarning and caution. [...] One ought to bestow much thought on the strength and suitability of each person, and on the helps or hindrances one is likely to meet with carrying out what one wishes to promise [Annotation 14].

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14 Ibid., [313] 121.
15 Ignatius gives detailed directives that concern many aspects of the life of the exercitants during the thirty-day retreat, such as the amount of light the retreatants should allow in their room—for example, more light when praying about joyful themes and less light when contemplating the Passion of the Lord—, the way to walk in the house and occupy their minds outside of the hours of prayer, the quality and quantity of food to be taken, whether or not to read books during the SE and which ones to read, and many others.
16 Consolation is when retreatants feel that they are close to God. In the words of Ignatius: “By consolation I mean that which occurs when some interior motion is caused within the soul through...
Ignatius’s analogy with physical exercises aptly fits his intent, for it is common-sense that, for instance, no one can run a marathon without going through a specific training for such a hard physical challenge. Usually, marathoners-to-be start with taking a walk every day, gradually moving to jogging, until they eventually get to participate in small races. Likewise, in the SE, Ignatius designs a formation program to train people for discernment which offers the means for people to achieve vocational aptitude in life. The Annotations show that spiritual discernment is the principal means to prepare and dispose one’s soul to achieve the goal of the SE. Retreatants need to discern the various motions they experience as they move along the different phases, movements or weeks of the SE and choose the ones through which God’s will for them is manifested.

2.3 – Discernment and Transformative Learning

In the second part of this chapter, I place the educational philosophy as it arises from the Annotations of the SE in conversation with some of the literature in adult education, especially transformative learning.

The three-step learning process I described at the beginning of this chapter does not take place necessarily in the order stated. Indeed, the driving motivation in adult learning often is the “What-does-it-invite-me-to-do?” question, which is a vocational inquiry about people’s vocations in life. Sometimes, however, people which it comes to be inflamed with love of its Creator and Lord. […] Finally, under the word consolation I include every increase in hope, faith, and charity, and every interior joy which calls and attracts one toward heavenly things and to the salvation of one’s soul, by bringing it tranquility and peace in its Creator and Lord.” Ignatius of Loyola, *Spiritual Exercises* [316] 122. Desolation is the opposite of consolation.
are happy with what they do but want to expand on the meaning of it. In this case, the starting point usually is the “What-does-it-say-to-me?” question, with which learners appropriate the content of their learning experience in a way that helps them in their overall meaning-making process in life. Finally, the triggering question can be the “What-does-it-say?” one. In this case, the main goal of the learners is simply to become more knowledgeable or informed about something.

As the Annotations show, the SE draw on pedagogical premises which affirm: 1) that adult learners rely heavily on their own experiences to learn; and 2) education happens best when learners are seen as partners and agents of their own learning. This is why the core of the SE is to form people who can discern and make decisions. Contemporary research concurs with the pedagogical premises of the Annotations:

Adults can call on their experiences in the formulation of learning activities, as well as serve as resources for others in a learning event. Second, the need to make sense out of one’s life experiences is often an incentive for engaging in a learning activity in the first place. Third, the actual engagement of past experiences with learning is somewhat different for adults than for children. An adult’s major use of experience in learning is on reintegration or transforming meanings and values, while children tend to use their experiences in accumulating new knowledge and skills.17

Also, for Jack Mezirow, “[l]earning is understood as the process of using a prior interpretation to construe a new or revised interpretation of the meaning of one’s experience as a guide to future action.”18 Therefore, transformative learning happens best in the communicative domain that “involves identifying problematic

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ideas, values, beliefs and feelings, critically examining the assumptions upon
which they are based, testing their justification through rational discourse, and
making decisions predicated upon the resulting consensus.”

As a matter of fact, there are three common themes in Mezirow’s theory of transformative learning, namely: 1) the learner’s experience, 2) critical reflection, and 3) rational discourse. They work together to contribute to transformation in the learner’s meaning-making process.

Moreover, scholars in the field of education are not the only ones who explore transformative learning. Joseph Raelin, a professor of management, argues that continuing formation and transformative learning are critical to sustainability in any organization. Raelin claims that learning has to become a way of life even if managers and employees do not allocate time to stop their busy routines to dedicate themselves to reflection, research, workshops, formation programs or weekend retreats. When organizations want to introduce learning as an organizational feature, the key element is to make learning arise from experience. Raelin also points out that reflective learning takes place at three different levels:

In first-order, or single-loop, learning, new data produce a direct challenge to current actions. . . .

In second-order, or double-loop, learning, we learn about contexts sufficiently to challenge the standard meanings underlying our habitual responses. […] By third-order learning, we become aware that our whole way of perceiving the world has been based on questionable premises. . . .

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Indeed, it is conceivable that without third-order learning, the potential for learning may be limited as practitioner actions and even adjustments become habitual and unwittingly inflexible [...] For example, in the midst of action, we may begin to rely on preconceived criteria for appropriate action. Unfortunately, this tendency limits our innovation in working through irregularities in certain contexts. Using third-order learning, [...] we attempt to uncover the underlying assumptions guiding our work and readjust our practice.20

Mezirow’s three orders of learning echo the SE’s attention to interior movements during the retreat. As a matter of fact, exercitants who are trained in the nuances of discernment have to keep track of their spiritual motions in every aspect of their lives. Moreover, the practice of discernment itself becomes more complex with time. Ignatius speaks of two sets of rules for recognizing the different kinds of spirits which move the retreatants. There are rules for the first week of the SE, which are more suitable for inexperienced people, whereas the ones for the second week provide for a more probing discernment of spirits.

One of the most noticeable differences between the two sets of rules is that the line of separation between consolation and desolation becomes more blurred insofar as people make progress in the spiritual life.21 As a matter of fact, in the first set of rules, consolation is caused by God, whereas desolation comes from the enemy of human nature, who tries to prevent spiritual advancement. In the rules for the second week, both the good and the evil spirits can cause consolation

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21 Ignatius defines the terms “consolation” and “desolation” as follows: “By consolation I mean that which occurs when some interior motion is caused within the soul through which it comes to be inflamed with love of its Creator and Lord. [...] Finally, under the word consolation I include every increase in hope, faith and love, and every interior joy which calls and attracts one toward heavenly things and to the salvation of one’s soul, by bringing it tranquility and peace in its Creator and Lord. [...] By desolation I mean everything which is contrary of what was described [above]; for example, obtuseness of soul, turmoil within it, an impulsive motion toward low and earthly things, or disquiet from various agitations and temptations.” Ignatius of Loyola, *The Spiritual Exercises* [316-317] 122.
in the soul. Therefore, the process of discernment requires more careful consideration.

In Mezirow’s three orders of learning, there is an evolution from the plane of reflection on mere practices to questioning meaning-making processes to critical assessment of premises. In the second week of the SE, retreatants will no longer be discouraged by their weakness, for, their sinfulness notwithstanding, they have been empowered to ask what they ought to do for Christ (see Chapter Three). Therefore, the tactic of the enemy of human nature is to encourage the exercitants to do good but with the secret purpose to harm them. More specifically, as Ignatius explains:

It is characteristic of the evil angel, who takes on the appearance of an angel of light, to enter by going along the same way as the devout soul and then to exit by his own way with success for himself. That is, he brings holy thoughts attractive to such an upright soul and then strives little by little to get his own way, by enticing the soul over to his own hidden deceits and evil intentions.22

The retreatants then need to go beyond the assessment of practices and pay attention not only to the process they employ but also to the under-girding premises of their actions. I see in the words of Ignatius about people’s “train of thought” an invitation to access deeper levels of learning comparable to Mezirow’s three orders of learning:

We should pay close attention to the whole train of thoughts. If the beginning, middle and end are all good and tend toward what is wholly good, it is a sign of the good angel. But if the train of thoughts which a spirit causes ends up in something evil or diverting, or in something less good than what the soul was originally proposing to do; or further, if it weakens, disquiets or disturbs the soul by robbing it of peace, tranquility and quiet which it enjoyed

22 Ibid., [332] 126-127.
later, all this is a clear sign that this is coming from the evil spirit, the enemy of our progress and eternal salvation.\textsuperscript{23}

However, Mezirow’s theory of transformative learning has shortcomings such as: 1) Mezirow’s emphasis on individual change over social change; 2) decontextualized transformative learning, in which power relations and social forces are neglected; and 3) little attention to cultural differences, which overemphasizes rationality that is centered on the individual at the expense of more affective learning styles. For Edward Taylor, Mezirow has to broaden his understanding of what transformation and transformative learning mean. In Taylor’s words, Mezirow sees transformative learning as

the very essence of adult education, such that the goal of adult education is “to help the individual become a more autonomous thinker by learning to negotiate his or her own values, meanings, and purpose rather than uncritically acting on those of others” […] This perspective rests on the belief that there is inherent purpose, logic, and ideal associated with transformative learning theory. Significant learning involves the transformation of meaning structures through an ongoing process of critical reflection, discourse, and acting on one’s beliefs.\textsuperscript{24}

In order to offer a complementary view of transformative learning and one more resonant with the SE, I turn now to Donald Schön, a social scientist, who also asks for models of education that rely on an epistemology of practice based upon reflection in action. Schön favors

traditions of education for practice [such] as studios of art and design, conservatories of music and dance, athletics coaching, and learning by doing. Professional education should be redesigned to combine the teaching of applied science with coaching in the artistry of reflection-in-action.\textsuperscript{25}

\textsuperscript{23} Ibid., [333] 127.
\textsuperscript{24} Edward W. Taylor, \textit{The Theory and Practice}, 12.
\textsuperscript{25} Donald A. Schön, \textit{Educating the Reflective Practitioner} (San Francisco: Jossey-Bass, 1986), xii.
While Mezirow educates for autonomy, Schön points to the significance of education for collective action. Therefore, critical reflection assesses what people do and how they do it, especially how people bond with one another. According to Schön, athletics and artistic coaching are good examples of learning by doing and discernment, or reflection in action with others. Likewise, in the SE, directors are expected to be coaches of the retreatants’ own spiritual journey with God. Those who give the SE are but privileged witness to the exercitants’ collaboration with God’s work in their lives.

Schön argues for a five-step process of reflection in action. Firstly, there is any action the person or group is familiar with. There is no particular effort or deliberation to behave in that way though. Secondly, something breaks the continuity of the routinized series of behaviors and responses. Many education theories indeed explore how learning happens when students are surprised and challenged by something that makes the existing equilibrium in their knowledge system disappear. Thirdly, the search for a new equilibrium leads to reflection within the context of action, but also makes learners turn to themselves (self-assessment). Fourthly, reflection-in-action has a critical function and questions the assumptions of the existing knowing-in-action. Not only is action revised, but also its meaning and premises, which implies the person or group in their meaning-making activities. Lastly, new action patterns are unleashed.26

This whole process is similar to what happens during the experience of the SE. Retreatants examine their lives in the context of the thirty-day-long

26 Ibid., 28.
retreat, which, in turn, breaks some patterns of their life-style. The goal is to embrace that which is more conducive to faithfully following Jesus Christ.

Schön makes his epistemological framework more clear by opposing it to the Positivist ideology of the late nineteenth century. Relying upon August Comte’s conviction that empirical science was the only source of positive knowledge of the world, Schön observes that Positivists became increasingly sophisticated in their way of understanding the world and in their pedagogical theories. “They began to see laws of nature not as facts inherent in nature but as constructs created to explain observed phenomena, and science became for them a hypothetico-deductive system.”27 Conversely, like the SE, Schön favors an inductive approach to knowledge and teaching, as the steps listed above demonstrate.

Raelin also looks for an epistemological framework that echoes some of Schön’s concerns. In times of ever-changing markets and working conditions, learning is to be conceived as both a tool and a way of life in order to form people who are capable of coping with change and who learn in every circumstance. Therefore, the first educational task is to teach how to learn to learn. Other approaches fall short of the expectations of organizations. To teach only skills, for example, although important, is not enough because, most likely, they will become obsolete as professional careers demand new skills unforeseeable during the schooling years. Raelin states that the most valuable employees are the ones who are able to adapt to the shifts that their organizations endure. Raelin concurs with Schön’s concept of reflection and learning in action.

27 Ibid., 33.
which uses the notion of apprenticeship as a helpful learning model for the
twenty-first century, and offers two corrective remarks to the apprenticeship
analogy:

[A]pprenticeship cannot be a proper metaphor for the new learning in
modern society unless it is modified in two critical ways: First, work […]
entails more cognitive or implicit knowledge than observable knowledge.
Therefore, apprenticeship requires the talent of “externalizing” processes
symbolically. […] Second, traditional apprenticeship presumed relative
constancy in the activities being learned. However, modern work activities
often hold few constants or routines. We need learning processes that can
entertain volatility in the work environment.28

Schön approaches transformative learning as artistic coaching, which
addresses the two cautionary points that Raelin raises against the apprenticeship
metaphor.29 Schön understands that reflection in action is more an attitude than a
skill. Hence, transformative learning happens best when people have learned how
to learn, which means: 1) to remain open to learn from the unexpected challenges
they face in everyday life (learning attitude); 2) to question their premises and be
able to think inductively (reflection); 3) to integrate knowledge and wisdom from
others and promote learning that is action-oriented and action transforming
(collective thinking in action).

The practice context is different from the research context in several
important ways, all of which have to do with the relationship between
changing things and understanding them. The practitioner has an interest in
transforming the situation from what it is to something he likes better. He also
has an interest in understanding the situation, but it is in the service of his
interest in change.

When the practitioner reflects-in-action in a case he perceives as unique,
paying attention to phenomena and surfacing his intuitive understanding of
them, his experimenting is at once exploratory, move testing, and hypothesis

28 Joseph A. Raelin, Work-Based Learning, 11.
29 Cf. Donald A. Schön, Educating the Reflective Practitioner, 41-79.
testing [whose results will be compelling only for those who share his commitments]. . .

These distinctive features of experimenting in practice carry with them distinctive norms of rigor. The inquirer who reflects-in-action plays a game with the situation in which he is bound by considerations pertaining to the three levels of experiment—exploration, move testing, and hypothesis testing. His primary interest is in changing the situation. […] But he must be open to learning from reflection on the situation’s resistance that his hypothesis is inadequate, and in what way. . . .

The educational philosophy as it arises from the Annotations of the SE intends to form people who are able to discern and choose for themselves what to do with their lives. I contend that those people are better equipped to help Jesuit schools keep faithful to their educational mission. Therefore, the first operative principle that I draw from the SE for formation programs as referred to in this dissertation is **discernment**.

The transformative-learning literature reviewed above shows some common threads that resonate with the pedagogy of the Annotations. Among them, there is the ideal which sees discernment as a way of proceeding in life rather than a mere tool to be used to solve problems. Discernment requires the entire person’s reality and that this person be part of a discerning community. Moreover, discerning people keep themselves open to pursuing critical assessment of their personal and professional situation and are not afraid to confront their own limitations. Lastly, both discernment in the SE and transformative learning in other disciplines interested in professional continuing formation unleash an ever-going process of identity renewal in mission-driven organizations.

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Developmental theories in the field of education also enrich one’s understanding of the educational philosophy as it arises from the Annotations of the SE. I look at discernment not only as a tool of the reflective practitioner and a means for transformative learning, but also as an ability that comes as people mature. Robert Kegan and James Fowler studied meaning-making and faith development toward maturity. Their theories help (post)modern readers to have access to the profile of exercitants that Ignatius had in mind and which abilities the author of the SE expected from his retreatants.

Kegan and Fowler conceived human developmental theories that honor who human beings are and how educational processes can enhance the best of what men and women are called to become. They favor an interdisciplinary approach to their research. Therefore, they draw their conclusions on different fields such as Piaget’s neuro-pedagogical experiments, Erikson’s psychosocial perspective, and social scientist J. W. Burton’s contribution on conflict resolution. When Kegan and Fowler address the passage from third to fourth developmental phase, they provide the appropriate framework that will allow individuals to cope with the demands of (post)modern societies.

Kegan describes five Orders of Consciousness, while Fowler lists seven Stages of Faith. In both theories, when individuals operate within the fourth level of the evolutionary scale, they attain levels of relationship which no longer rely primarily upon authoritative guides or models coming from outside of the person. Commitments, responsibilities, and decision-making processes are no longer
primarily founded upon one’s identification with one’s group or community. The passage from third to fourth stage does not mean, however, that individuals lose grounding, but it does break open the socialization process into a new phase in life, which allows individuals to overcome the shortcomings of uncritical embeddedness in their own socio-cultural environment, be it religious, ethnic, geographical or any other one. Such an evolution is instrumental in providing people with the necessary ability to discern along their life cycle how to keep faithful to the values they appropriate for themselves. Ability to discern is then pivotal, especially in pluralistic (post)modern societies and ever-changing contexts in which communities no longer nurture their members as life-style enclaves used to do in the past. As Kegan puts it: “The claim of modernity is […] echoed in Alice Miller’s words: ‘It is necessary today for the individual to find his support within himself.’ We must shift the gears ourselves, she is saying, and not be looking for cars with automatic transmissions.”31 Accordingly, the SE enable the retreatants to discern and choose (see decision in Chapter Five) for themselves their most fulfilling inclinations (see desires in Chapter Three) in order to be at the service of Christ’s mission (see diakonia in Chapter Four).

2.4.1 – Robert Kegan’s Third and Fourth Orders of Consciousness

Our self-conscious adherence to the responsibilities of our social roles and our identification with them are third order accomplishments. […] If ‘role’ is a third order construction, we can be responsible to our roles with third order consciousness. But we cannot be responsible for roles – for monitoring others’ and our own responsibility to them – without a fourth order capacity to nest

The third order of consciousness is necessary in human development in general and in faith development in particular because it allows people to see for themselves the content of faith that is handed on to them. Believers become then agent-subjects in the religion to which they belong. Their response to their faith community is: “Yes, now I say that I am a member of this community. I say what my community says.”

However, Kegan argues that third-order-of-consciousness individuals are not equipped with all the abilities they need to fulfill the tasks that our contemporary society and culture ask of them. Unlike in traditional cultures, adult members of (post)modern societies are expected to “step back” from their belonging to any group (embeddedness) in order to see for themselves which are the group values that really make sense to them. In doing so, they will be able to have a better sense of the values that they want to foster along their life cycle, always in negotiation with the various circumstances with which they are confronted throughout their life journey. In fact, Kegan explains that “[i]n traditional cultures or subcultures there exists a more homogeneous fabric of value and belief, a shared sense of how the world works and how we should live in it.” However, in (post)modern societies, third-order-of-consciousness achievements fall short in making it possible for individuals to move beyond the patterns and themes that structure their lives. This move does not necessarily

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32 Ibid., 96.
33 Ibid., 103.
mean that these patterns and themes will be rejected, but it does respond to a
cultural reality that requires of its members the ability to construct an internal
agent-subject who engages in adult conversation with those same values that are
embraced when individuals say: “Yes, now I say what my community says.” In
Kegan’s words:

Third order consciousness makes it possible for [an individual] to discover
patterns and themes to his life history, make connections between past and
present, and have insight into why he feels as he does. But his lack of a fourth
order consciousness makes it impossible for him to “do something productive”
with the insight, just as it is one thing to have an inner psychological life one
can experience and report as internal (a third order capacity) and quite another
to see oneself as the constructor of that inner psychological life. If one’s inner
experiences just “show up” there, so that the self-conscious self is an audience
for its inner experiencing, then insight turns out to be insight into why the
audience reacts as intensely to the content as it does, rather than into why or
how the author writes the script or drama as he does. . . .

This way of being “aware of my issues” presumes a self that is not only
the experiencer of a reportable internal psychological life but also the maker
of an internal psychological life. The demand for this construction of the
self—as author, maker, critiquer, and remaker of its experience, the self as a
system or complex, regulative of its parts—is again a demand for fourth order
consciousness. The demand that we be in control of our issues rather than
having our issues be in control of us is a demand for fourth order
consciousness.34

Accordingly, in the SE, retreatants rely on personal experiences of
consolations and desolations to pursue and find God’s will in their lives. In the
spirit of the fifteenth Annotation (see 2.2 above), no director’s intervention can
substitute for the actual communication between God and the exercitants. In other
words, both Kegan and the SE call people to responsibility for who they become
in their life journey rather than being totally determined by their cultural
embededness.

34 Ibid., 132-133.
In order to understand Kegan’s developmental theory and compare it to Fowler’s, it is also important to explain the concept of meaning-constitutive evolutionary activity. For Kegan, this activity allows men and women to unify their diverse and ever changing experiences throughout their lifespan. People’s lives are continually in motion, and the meaning-making process is the bedrock upon which individuals build their sense of stability and continuity. Humans can keep their center and balance through the experience of recovering meaning and order each time their lives change. This underlying process is given expression in the articulation of three human phenomena, namely:

The first is the apparently universal tension between the longing to be included, attached, “a part of,” on the one hand, and the longing to be distinct, separate, autonomous on the other. The second is the apparently universal and recurring experience of losing and recovering a sense of meaning and order. And the third is the apparently universal need to be recognized.35

Moreover, Kegan argues that the meaning-making activities are a source of unity in people’s ever-changing lives because they put in evidence the religious dimension of human existence. In other words, it is the religious or spiritual dimension of human beings that allows us to keep recomposing meaning in the aftermath of existential shifts. Therefore, constructive-developmental perspectives can help us understand how faith can progressively allow people to see the underlying coherence of their lives. The religious dimension of human existence is the one capable of allowing individuals to see the underlying “ground beyond ground” or the truth that supports men and women in their struggle to

become who they really are despite the many circumstantial changes in their lives.

In other words, evolution from third to fourth order of consciousness explains why it is possible to expect that retreatants will be able to discern based upon the motions they experience during the SE.

### 2.4.2 – James Fowler's Third and Fourth Stages of Faith

Fowler calls his third stage the Synthetic-Conventional Faith. The author draws its characteristics from Piaget’s term “formal operational thinking.”

According to Piaget, in early adolescence, boys and girls start imagining new possibilities beyond the concrete reality with which they learned to cope in their previous “concrete operational thinking” phase. In Fowler’s words:

> The key to our understanding the structure and dynamics of [the third] stage is appreciation of a revolution in cognitive development that adolescence typically brings. In formal operational thinking the mind takes wings. No longer is it limited to the mental manipulation of concrete objects or representations and observable processes. Now thinking begins to construct all sorts of ideal possibilities and hypothetical considerations. Faced with the challenge of developing the perfect mousetrap, the formal operational mind doesn’t limit itself to modifying and perfecting the type of mousetraps it has seen, but it starts with the fundamental problem of disposing of a household pest and imagines a great variety of ways the problem might be solved. Imagination, one writer has said, is intelligence at play. Formal operational thinking makes possible the generation and use of abstract concepts and ideals. It makes it possible to think in terms of systems. And it enables us to construct the perspectives of others on ourselves—to see ourselves as others see us.\(^\text{36}\)

Fowler calls his fourth stage Individuative-Reflective Faith.\(^\text{37}\) It is characterized by asking critical questions that lead the faithful to make choices

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\(^{37}\) Some authors use the term “Individuated-Reflective Faith” instead.
about their own faith. If the previous Stage had allowed early adolescents to see
themselves as others see them, now young adults in their twenties or even thirties
are invited to see themselves for themselves. In fact, Fowler explains that “[i]n the
previous stage, it is very difficult to pull together unified images of identity and
faith and at the same time critically reflect on those images.”38 In other words, in
eyear adolescence, one achieves a certain level of certainty concerning one’s own
faith, but this certainty is generally the result of understanding, internalizing and
embracing one’s own participation in the larger community. Therefore, Fowler
decoded the semi-autonomous dynamics of early-adolescent faith with respect to
the values and beliefs of the community.

However, Fowler argues that this very same third stage has consequences
beyond early adolescence. It is indeed responsible for people’s moving on in their
life cycle with strongly felt beliefs and values, although tacitly held, for they do
not yet have the ability to reexamine their faith content for themselves. In
Fowler’s words: “The rise of individuative-reflective faith is occasioned by a
variety of experiences that make it necessary for persons to objectify, examine,
and make critical choices about the defining elements of their identity and
faith.”39

Jane Regan argues that the arrival at the third stage is the result of the
process of socialization that children undertake during the years of both early and
late childhood. In stage three, adolescents’ worldview will have been formed out
of their own group’s way of making sense of life. Regan emphasizes that

38 James W. Fowler, *Becoming Adult*, 49.
39 Ibid., 49.
adolescents’ primary source of identity is whatever they will have synthesized and
internalized out of the socialization process they went through during childhood.

The process of taking (assimilation) and actively interpreting and making
meaning (accommodation) of new experiences introduced through the
developing child’s and adolescent’s intellectual capacity and his or her
expanding social world takes place within the established frame of meaning of
the dominant reference groups. The process of socialization leads to a
coherent framework for meaning making and faith knowing that can sustain a
person throughout life.40

However, Regan questions the appropriateness of staying at stage three
throughout one’s life cycle. Writing for religious educators and pastoral ministers,
she is aware of the fact that life brings changes, and most parts of adult life will be
about dealing with changes and managing change. Regan’s primary interest
therefore is to help people to engage their own faith experience in the midst of
changes, which are the place where God can be found. Commenting on Fowler’s
theory, Regan investigates how that transition from third to fourth stage takes
place and its importance for adult faith formation:

But what if the coherent framework comes under challenge by internal
disagreement or contradiction? What happens when valued authority
sources—the defining agents of what “we” believe—begin to disagree among
themselves? What happens when the person’s expanding world introduces him
or her to people with differing beliefs and ways of life? when “they” are
recognized as worthy of admiration and emulation? when “they” offer a viable
and attractive alternative to what “we” believe? And what happens when the
belief system or the image of God, which were received in this process of
socialization, are inadequate for dealing with the challenges of life? These are
all factors that initiate the transition into Stage 4 Individuated-Reflective
faith.41

40 Jane E. Regan, Toward an Adult Church: A Vision of Faith Formation (Chicago: Loyola Press,
2002), 48-49.
41 Ibid., 49.
For Fowler, the three-to-four transition gives place to the idea of vocation, which is critical for his adult faith/religious formation project. Vocation is to find a purpose for one’s life which is related to the purpose that God has for one’s life. Moreover, vocation has to do with a way of being both with and for others, in the world and for the life of the world. Vocational questions deal with the meaning-making process that individuals develop throughout their life-cycle, and, in a Christian environment, such process is to be understood as a personal and communal response to God’s calling. In other words, it is a response to God who is always at work creating and recreating the world, and who wants to invite God’s children into a relationship of partnership with Godself.⁴² Fowler states that “we are creatures who live by faith. We live by forming and being formed in images and dispositions toward the ultimate conditions of our existence.”⁴³ Vocation is the process of meaning making that draws on one’s life experiences. People do this by being attentive and reflective about God’s work in their lives, which the SE call discernment.

Fowler also shows that vocational awareness, like discernment, is a way of life and not a task that people undertake only once in their lifetime. Fowler argues that people evolve in their faith in the same way they grow psychologically, politically, socially and affectively during their life cycle.

The crucial point to be grasped is that the image of human completion or wholeness offered by faith development theory is not an estate to be attained or a stage to be realized. Rather, it is a way of being and moving, a way of being on pilgrimage. The faith development perspective depends on the

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⁴² It is appropriate to remember here the content of Annotation 1. See p. 44 above.
conviction that each person or community continually experiences the availability of the Spirit and its power for transformation.\textsuperscript{44}

Therefore, each person is called to play an active role in his or her economy of salvation, namely, in the way he or she will respond to God’s calling for partnership. Vocational discernment has to do, firstly, with who this person is and will become by responding to God’s initiative in his or her life. Secondly, it is about the way this person will serve others in the community or in the world at large. In fact, Fowler continually reminds us that personal discernment always takes place in the midst of a community which both mediates and recognizes the discerned response of the individual. In Fowler’s words: “From the standpoint of a Christian view of human vocation, the Eudaimonist’s ‘golden figurine within’ is inevitably an idol. In the perspective of vocation, we are called to personhood in relationships. There is no personal fulfillment that is not part of a communal fulfillment.”\textsuperscript{45}

\textbf{2.4.3 – Kegan and Fowler: a Summary}

Kegan and Fowler take into account the fact that people experience several changes across their life cycle, especially in (post)modern pluralistic societies. Moreover, they also coincide in the importance they accord to religion in the task of keeping people’s balance along these changes. Their contribution to this dissertation is twofold: 1) their theories highlight the developmental process that the SE also intend to foster; and 2) they call people beyond social

\textsuperscript{44} Ibid., 60.
\textsuperscript{45} Ibid., 83.
conditioning to agency in responsible discernment and choice of their vocational path in life or, in other words, of who to become.

Kegan and Fowler differ, however, in their understanding of how people evolve. Kegan’s Orders of Consciousness are movements ever-present in human development, whereas Fowler’s Stages of Faith are more rigidly age-related. Regan argues that, for Kegan,

[t]o break open the meaning of adult development and to disclose the religious dimension of human existence and human growth is to look beyond the foreground of stages to the background of the motion of human be-ing. Put more simply, […] persons are not their stages of development; persons are a motion, a creative motion, the motion of life itself.”46

In other words, for Kegan, human life is not a succession of stages but rather a continuum of dynamic movements with havens of stability among them. Third- and fourth-order-of-consciousness individuals are actually two distinguishable but continuous ways of being in the world. Fowler, however, understands his Stages of Faith in a more sequential way. As Regan puts it:

Attempting to keep a theoretical foot in the psychosocial perspective of Erikson as well as in the structural development school of Piaget and those who followed his framing of the developmental question, Fowler proposes a model for understanding the sequential movement of the person’s faith-knowing. He proposes sequential, hierarchical, and invariable stages that a person may pass through beginning in infancy and continuing to old age – each stage representing a more sophisticated, complex, and inclusive way of “faithing” in the world. And with other developmental theorists, Fowler proposes that the movement from one stage to the next is the active meaning-

46 Jane E. Regan, Toward an Adult Church, 40. The use of the word “motion” and the way Regan applies it to Kegan’s theory aptly fits the dissertation because “motions” are the basis for spiritual discernment in the SE. Ignatius assumes that the retreatants will experience spiritual movements called “motions” during the SE. Motions during the retreat correspond to the various existential changes and movement in life.
making subject’s response to his or her engagement with the sociocultural
world.\textsuperscript{47}

Moreover, Fowler argues that the transition from one stage to the next
happens as the natural consequence of shifting circumstances across people’s
lifespan, whereas Kegan identifies fourth-order insights that cannot be taught or
learned,\textsuperscript{48} which suggests that many people will move across their life cycle
without attaining the Fourth Order of Consciousness. What Kegan does believe in
though is that the consciousness that gives rise to these four insights can be
developed. “Trying to teach insight without transforming consciousness is like
trying to create apples without growing apple trees.”\textsuperscript{49} It seems to me that
Kegan’s perspective requires more intentionality both of the educator and the
educand. Surely, the educational philosophy as it arises from the Annotations of
the SE concurs with Kegan’s insights by fostering spiritual discernment in lieu of
top-down indoctrination.

Intentionality is a strong characteristic of the educational philosophy as it
arises from the Annotations of the SE. Ignatius lays out a careful progression from
the first to the second movement of the retreat (see, for example, Chapter Four on

\textsuperscript{47} Ibid., 42-43.
\textsuperscript{48} The four insights are: 1. We are not made up by the other’s experience; 2. The other is not made
up by his or her experience; 3. We are not made up by our experience; 4. The other is not made up
by our experience. Kegan states that these insights are “the conceptual foundation for the ability to
‘avoid taking on responsibilities that are not one’s own’ and to ‘avoid assigning to others
responsibilities that are not theirs.’” Cf. Robert G. Kegan, \textit{In Over Our Heads}, 128.
\textsuperscript{49} Ibid., 128-129. I wonder if Kegan’s position on this point is influenced by Paulo Freire’s idea of
conscientization. The Brazilian educator wrote in his \textit{The Pedagogy of the Oppressed} that “[t]he
correct method for a revolutionary leadership to employ in the task of liberation is, therefore, \textit{not}
‘libertarian propaganda.’ Nor can the leadership merely ‘implant’ in the oppressed a belief in
freedom, thus thinking to win their trust. The correct method lies in dialogue. The conviction of
the oppressed that they must fight for their liberation is not a gift bestowed by the revolutionary
leadership, but the result of their own \textit{conscientização}.” \textit{The Paulo Freire Reader}, edited by Ana
Maria Araújo Freire and Donaldo Macedo (New York: Continuum, 2001), 64.
contemplation as a way of learning in comparison with the exercise of meditation). The SE provide both directors and retreatants with the necessary steps to improve consciousness about the stage of development at which people are when they start the retreat.

Directors need to assess the ability of the exercitants to go beyond the first week of the retreat. At the same time, the ones giving the exercises can improve their retreatants’ level of consciousness by emphasizing the journey that the retreat unfolds for them. Chapters Three, Four and Five of this dissertation unpack the mechanisms that will be at work to make exercitants realize that they are invited to decide for themselves how they want to translate their deepest desires into a concrete life-style of service to others for the life of the world. As a matter of fact, desire, service or diakonia and decision are the under-girding operative principles of the three main movements of the SE. They have the potential to educate toward accomplishments which are resonant with Fowler’s Fourth Stage of Faith and Kegan’s Fourth Order of Consciousness.

Finally, a word is needed about the developmental stages in Kegan’s and Fowler’s theories that are not represented in this chapter. The attempt to study exhaustively their various stages of developmental theories goes beyond the scope of this dissertation. Educating for and negotiating the transition from third to fourth stages is crucial in order to achieve the goal of forming partners and co-agents of a common mission, be it an explicitly evangelizing mission in the context of the SE taken as they are, or the fostering of the mission of Jesuit educational institutions which is the concern of this dissertation. Transitioning
from stage three to four is not the end of the journey. But it is the condition sine qua non to live up to the demands of formation programs for educators to become partners in the common mission of Jesuit schools.

2.5 – Conclusion to Chapter 2

How to form partners in education to share in the common mission of Jesuit schools? The Annotations of the SE provide those who face the challenges of this question with an operative principle for the formation programs they will design to that effect. Such operative principle is discernment. Formation programs that aim to educate for partnership in the mission of Jesuit schools have to educate for discernment understood as vocational search with all that it entails.

Therefore, those programs are to draw on the pedagogical premises of the SE as they arise in the Annotations, namely: active learning and understanding the learner as future partner. Contemporary research in various areas of adult education confirms that those premises allow learning to happen at its best. Moreover, those who design formation programs for educators in Jesuit schools are to facilitate human development which allows people to appropriate for themselves the Jesuit tradition in education.

Formation programs achieve that goal insofar as they invite educators to be in touch with their desires, expose them to the inspiring mission of Jesuit education, and invite them to find their own place and role in the common mission of Jesuit schools. This triple task is the content of the following three chapters of the dissertation.
Chapter 3 – Who Am I? The Principle and Foundation and the First Week of the Spiritual Exercises

The first movement or week of the SE centers on the exercitants’ deepest desires or affections. At the end of the first week, the retreatants are expected to have a realistic idea of who they are, where they are in their life journey, and a vision of where they want to go. The first movement of the SE puts the exercitants in touch with their own sense of identity and mission. Likewise, formation programs that aim to form partners in the common mission of Jesuit schools have to allow educators to discover, understand and embrace their personal vocation and mission in the world in general and at the Jesuit educational institution where they work in particular. The first movement of the SE leaves the exercitants with one programmatic question: “What ought I do for Christ?” Analogically, the formation programs I envision need to invite educators to bring their life and vocation to their profession and bring their profession to their sense of purpose and mission in life. One of the operative principles to allow exercitants and educators to achieve that goal is “desire” or, more precisely, to be in touch with one’s deepest desires.

Chapter Three studies the first movement of the SE, which corresponds to the text of the Principle and Foundation (3.1) and the actual exercises or meditations of the First Week of the thirty-day retreat (3.2). Chapter Three also emphasizes what is referred to as the pedagogy of desire in Ignatian spirituality (3.3). Just as director and exercitant form a learning community during the actual
experience of the SE, Jesuit schools are called to be learning and mentoring communities in which educators can learn how they desire to become part of the common mission of Jesuit education (3.4, 3.5 and 3.6).

The actual experience of the SE offers a safe space for the retreatants to be in touch with, know, discern and nurture those desires which are more conducive to making them the disciples of Jesus that they want to be. It is indeed the total reality of each person that is engaged in the existential project of Christian discipleship. More specifically, the ability to love, which manifests itself through people’s desires, inclinations and affections, is the most decisive among human faculties. It is love that eventually determines the level of truth, authenticity and effectiveness of people’s vocational commitment. “Therefore, if those priority tasks are taken into account, namely, the knowing and ordering in spiritual life of one’s desires, the *Spiritual Exercises* may well be also understood as a true ‘school of the desire.’”¹

Likewise, formation programs in the Jesuit tradition in education which aim at forming partners in a common mission need to provide educators with the safe environment that learning and mentoring communities create. Jesuit schools must foster the kind of vocational search that is rooted in people’s deepest desires, thereby contributing to a wholesome formation of their educators and consequently training of future co-agents of their Jesuit educational mission.

3.1 – The Principle and Foundation

The internal dynamic of the first week of the SE has three moments: 1) the Principle and Foundation, which serves as an existential compass for the entire retreat and beyond; 2) a long meditation upon God’s continuing work of love through the reality of personal and social sin; and 3) the liberation of the exercitants from disordered tendencies, which allows them to be in touch with their deepest and truest desires and ultimate vocational question.

The first moment of the first movement of the SE is Ignatius’s Principle and Foundation, which reads as follows:

Human beings are created to praise, reverence, and serve God our Lord, and by means of doing this to save their souls.2

The other things on the face of the earth are created for the human beings, to help them in the pursuit of the end for which they are created.

From this it follows that we ought to use these things to the extent that they help us toward our end, and free ourselves from them to the extent that they hinder us from it.

To attain this it is necessary to make ourselves indifferent to all created things, in regard to everything which is left to our free will and is not forbidden. Consequently, on our own part we ought not to seek health rather

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2 Traditionally, “to save (or loose) one’s soul” has to do with the afterlife eternal salvation in heaven or damnation in hell of people’s spiritual principle, namely, their soul. More recently, however, the understanding of this expression has been expanded at least in two fundamental ways. Firstly, human persons are a unity of soul and body. Therefore, the word “soul” has recovered its biblical sense and refers to the person. Secondly, salvation or loss of soul can happen in this world as well. People can loose their souls, for example, through the pursuit of their false self, or because of lack of integrity, agency or solidarity. The Pastoral Constitution on the Church in the Modern World—Vatican II Gaudium et Spes [14]—teaches that: “Man, though made of body and soul, is a unity. […] Man is not deceived when he regards himself as superior to bodily things and as more than just a speck of nature or a nameless unit in the city of man. For by his power to know himself in the depths of his being he rises above the whole universe of mere objects. When he is drawn to think about his real self he turns to those deep recesses of his being where God who probes the heart awaits him, and where he himself decides his own destiny in the sight of God.”, in Austin Flannery, O.P. (Ed.), Vatican Council II: The Conciliar and Post Conciliar Documents (Dublin: Dominican Publications, 19880, 914-915.
than sickness, wealth rather than poverty, honor rather than dishonor, a long life rather than a short one, and so on in all other matters.

Rather, we ought to desire and choose only that which is more conducive to the end for which we are created.³

Creation is a critical category in Christian anthropology. Human beings are created in the image and likeness of God. Body and soul are created by God to form a unique being on Earth. The biblical vision of creation shows that God creates because God is love and desires to love. God establishes a personal and gratuitous relationship with men and women, which reveals that nobody is abandoned, excluded or condemned to live apart from God. On the contrary, the Creator invites men and women into a partnership based upon love and service and in communion with each other’s cause. This is the meaning of covenantal creation.

Moreover, creation is an on-going process conducted by God in partnership with human beings. As Karl Rahner writes, echoing Ignatius’s theology of Creation in the SE, “God is the One Who constitutes me in mysterious freedom, and disposes over me in such a way that through the divine absoluteness my autonomy and self-direction are not diminished, but rather firmly established.”⁴ Ignatius chooses to tell the exercitants that they are created with a clear purpose instead of they were created. At the threshold of the first movement within the spiritual journey of the SE, therefore, Ignatius engages the retreatants with the here and now of their own experience.

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Ignatian spiritual experience nurtures a deep sense of the holiness and of the infinite majesty of the triune God. At the same time, however, Ignatius experiences God as an active God in history. Ignatius understands the world as the central place where God reigns through the Spirit of the risen Christ. In other words, as Jean Daniélou summarizes Ignatius’s understanding of the correlation between history and mission,

sacred history is an actual reality […]. What are the great works which Christ accomplishes now and which continue the great works of biblical and evangelical history, filling up the interval between the Ascension and the Parousia, the “sedet ad dexteram” to the “iterum venturus est”? It is “the mission”, that is to say, the extension to the entire world of the grace of Christ through preaching and the sacraments. The mission […] is a mystery which is always contemporary. […] And it is in this historical reality that [Ignatius] invites generous souls to cooperate. Here, then, the praxis and theoria join.

However, history is not only sacred. It is also the locus of dramatic conflicts where good and evil struggle within the human heart. God creates and re-creates with the purpose to lead all of humankind to the fulfillment of each person’s potentialities. But all too often do people make choices that are not conducive to achieving their ultimate purpose in life and in the after-life for that matter. Indeed, the expression “to save their souls” is understood as both immanent fulfillment and transcendental salvation. Ignatius invites the exercitants

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5 The last exercise of the SE is the “Contemplation to Attain Love.” In it, Ignatius invites the exercitants to “ponder with deep affection how much God our Lord has done for me [the retreatant herself or himself], and how much [God] has given me of what he possesses, and consequently how he, the same Lord, desires to give me even his very self, in accordance with his divine design.” Later on, Ignatius is even more explicit about his idea of God. The exercitants are to “consider how God labors and works for me in all creatures on the face of the earth, that is, [God] acts in the manner of one who is laboring. For example, he is working in the heavens, elements, plants, fruits, cattle, and all the rest—giving them their existence, conserving them, concurring with their vegetative and sensitive activities, and so forth. Then I will reflect on myself.” Ignatius of Loyola, The Spiritual Exercises, [234] 94 and [236] 95.

to examine their lives in order to discern the choices which best lead to the end for which they are created. Choices that are not so conducive to achieving the retreatants’ purpose in life are called disordered attachments.

Ignatius nurtures a positive anthropology. He believes that people have the potentiality to will, desire and choose the good that is more conducive to the end for which we are created. But, first, they need to realize God’s loving presence in their lives, God’s continuing work of creation and liberation and how to overcome the disordered affections or attachments that prevent them from achieving that end.

Ignatian indifference is a central concept within the Principle and Foundation. Unlike the common understanding of the word indifference (i.e., lack of interest), Ignatius uses it to describe the ideal state of the discerning soul, which is that of complete freedom. Without Ignatian indifference, retreatants will not be able to be in touch with their deepest and truest desires because they will be driven by disordered attachment to other affections. In the words of George Ganss, indifference means

undetermined to one thing or option rather than another; impartial; unbiased; with decision suspended until the reasons for a wise choice are learned; still undecided. In no way does it mean unconcerned or unimportant. It implies interior freedom from disordered inclinations. It is a key technical term of Ignatius’s spirituality. To his examples of indifference it is often wise to add some which are fully under the control of our free will, such as: whether to become a physician or a banker; whether to read a book or go to a lecture. Ignatius’s own examples often fall outside our power to choose.7

Indifference is the condition _sine qua non_ for an authentic discernment.

On the one hand, discernment deals with concrete options such as the ones added

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7 George E. Ganss, SJ, *The Spiritual Exercises*, 151.
by Ganss to the list of examples given by Ignatius in his Principle and Foundation text. On the other hand, discernment has to do with one’s own interior movements, inclinations, questions and desires. Those who are being trained by the SE to discern are introduced to the realm of disordered affections. These are not necessarily sinful inclinations. As a matter of fact, both Ignatius’s list of examples and Ganss’s additions to it point to options that are morally neutral or not even options at all. The focal point for Ignatius is to teach the exercitants about interior freedom and the hindrances to it.

Accordingly, formation programs that train for partnership in the common mission of Jesuit schools need to make educators get in touch with their true self. Awareness of multiple desires within oneself is critical to discern those which are more conducive to the fulfillment of one’s vocation as enablers of the goals of Jesuit education.

3.2 – Meditations about Sin

The second moment of the first movement of the SE exercises takes shape during the five meditations about sin. I look at the SE as a formation program to form partners in mission. Therefore, despite the fact that sin deserves careful consideration in Christian theology, this technical discussion is beyond the realm of the dissertation. My goal is to understand how those meditations about sin, judgment and hell contribute to the exercitants’ ability to be in touch with their deepest desires. Moreover, I appropriate Ignatius’s pedagogical insights at this
point of the SE in order to contribute to the formation of partners in the common mission of Jesuit education.

On the one hand, Ignatius provides the retreatants with the framework of freedom, confidence and love of the Principle and Foundation. On the other hand, Ignatius does not want to deceive anyone and points to the fact that we are sinners in need of God’s love, who, in turn, never fails us. Like disordered attachments, sinful choices are obstacles to becoming indifferent about “the other things” that are means to achieve the end for which we are created.

But freedom, confidence, and love do not come only from the text of the Principle and Foundation. Indeed, Ignatius invites the exercitants to be grateful to God for not having been condemned to hell. Viewed from this perspective, the retreat itself is another chance for them to turn back to God. In other words, the retreatants make the experience that they are not entrapped for ever in their own “hell” of addictions or disordered affections. Therefore, freedom, confidence and love also come from the experience of being redeemed. That is why the first week of the SE is first and foremost about the loving work of God in the retreatants’ lives despite and beyond sin. Redemption is another way of experiencing God as creator. It is re-creation through reconciliation.

There is a correlation between creation and redemption, which is another critical category in Christian anthropology. Sin prevents human beings from the fruition of the relationship with God the way God intends it.

While human beings know themselves capable of sin in light of the abundant testaments to their human experience, they are never permitted to forget that sin misses the mark of who and what they are, that sin is not
freedom but a fundamental infidelity to themselves because it represents a
betrayal of their own promises freely entered into.\(^8\)

Ultimately, redemption means that men and women can walk again and
anew with God in paradise. Reconciliation is offered by God and accepted by
humankind so that covenant and not estrangement may prevail.

Without the framework of love and creation, self-knowledge to the point
of facing one’s sins and the sin of the world is unbearable. But in the light of love,
as Rosemary Haughton explains it, self-discovery becomes welcome because it
unleashes many possibilities of growth that could not be contemplated before.

Without love, self-knowledge must be rejected because it weakens the
defenses against the outside world. When it cannot be so rejected it is
contained, held, encapsulated in a stoic despair, or gloated in its containment
like some repulsive but fascinating animal. […] But in the light of love self-
knowledge is bearable, even welcome. So one of the effects of reconciliation
is greater individuation, a more complete awareness of oneself as distinct, yet
not cut off.

But the other effect is a greater degree of communication, and it occurs in
the same movement, for the same reasons, as the increased self-knowledge.
The distinguished self is able to give itself. […] But it is a particular kind of
distinctness, an unafraid and clear-sighted self-awareness; it is not the
withdrawal of pride that defends the beleaguered citadel but the confidence of
being valued that makes openness without fear possible [through love and
communication]. . . .\(^9\)

The first exercise of the first week of the SE is a good example of how
Ignatius leads the exercitants to savor the freedom, confidence and love which
come from the experience of God as creator and redeemer. The meditation is
about the sin of the angels and how they were expelled from heaven. Also, the


retreatants meditate about the sin of Adam and Eve, the corruption it brought to
humankind and how they were expelled from paradise. Lastly, the exercitants
reflect about anyone who is in hell because of sin. Throughout the first week of
the SE, however, Ignatius reminds the exercitants that they are called to become
disciples of and co-workers with Jesus in his mission, and that the SE give them
the opportunity to do so. Although sinners, they are created in love, confidence
and freedom. Even if the gravity and malice of the sin against God the creator
brings condemnation, the invitation for the retreatants is to experience that they
are recreated, welcomed, loved and given another chance. Ignatius himself makes
it clear to the exercitants when he sums up the meaning of the first exercise of the
first week of the SE:

This is an exclamation of wonder and surging emotion, uttered as I [the
exercitant] reflect on all creatures and wonder how they have allowed me to
live and have preserved me in life. The angels: How is it that, although they’re
swords of God’s justice, they have borne with me, protected me, and prayed
for me? The saints: How is it that they have interceded and prayed for me?
Likewise, the heavens, the sun, the moon, the stars, and the elements; the
fruits, birds, fishes, and animals. And the earth: How is it that it has not
opened up and swallowed me, creating new hells for me to suffer in forever?

I will conclude [the prayer] with a colloquy of mercy—conversing with
God our Lord and thanking him for granting me life until now, and proposing,
with his grace, amendment for the future. . . .

Formation programs for partnership in the common mission of Jesuit
education need to draw on the wisdom of the first week of the SE. Therefore, the
shortcomings or failures that educators face in their lives and professional
endeavor do not prevent them from being effective partners who foster the ideals
of Jesuit education. In the SE indeed, Ignatius shows that people’s awareness of

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God’s love and fidelity despite their sinful reality has the potential to unveil the possibilities of what people should be.

3.3 – The Vocational Question

Following the Principle and Foundation and the meditations about sin, the third moment of the first week of the SE arises from the experience of gratitude for God’s forgiveness. It refocuses the retreatants on the “here and now” of their life journey, especially their vocational pursuit. The exercitants have faced their own reality in the fullness of its potentialities—the Principle and Foundation—and limitations—the meditations about sin. Now, they feel empowered to be in touch with their deepest desires and to pursue what is more conducive to achieving the end for which they are created.

Therefore, the retreatants are invited to consider for the first time during the retreat an interpersonal relationship with the Lord Jesus Christ. The rehabilitated, redeemed and re-created exercitants encounter the source of the mission to which they aspire, and are drawn to it as partners-to-be. In the words of Ignatius:

Imagine Christ our Lord suspended on the cross before you [the exercitant], and converse with him in a colloquy: How is it that he, although he is the Creator, has come to make himself a human being? How is it that he has passed from eternal life to death here in time, and to die in this way for my sins?

In a similar way, reflect on yourself and ask: What have I done for Christ? What am I doing for Christ? What ought I do for Christ? . . .
A colloquy is made, properly speaking, in the way one friend speaks to another, [...] telling one’s concerns and asking counsel about them. . . .11

Ignatius invites the retreatants to experience gratitude and empowerment or gratitude which comes from empowerment, because not even sinfulness excludes them from God’s love and the possibility to “praise, reverence and serve God.” They are more able now than before the first week of the SE to become indifferent (i.e., free) with respect to all the other created things. Moreover, they are conscious of who they are and liberated from the paralysis that comes from sin. Although the universal reality of sin is painful, it does not eclipse God’s plan for humankind. This is the conclusion at the end of the first movement or week of the SE. The exercitants contemplate the reality of sin in their personal lives and in the world, but Ignatius reminds them of God’s continuing invitation to re-creation, redemption, reconciliation, to liberation and covenant. Rahner explains the dynamics of the first movement or week of the SE by emphasizing that,

as spiritual creatures, we always and necessarily reach out for the infinite in our free actions, [whereas] by our performed or realized godlessness we can strike at the ultimate and the irrevocable. Moreover, when I consider a redeemed man who is lost because of one mortal sin, I should also say: The occurrence of a mortal sin really produces damnation, it has an iron grip on a man as long as he remains identified with his sin; and the final form of his existence, resulting from this identification of person and act, can enter at any point in his life. Every moment of my life can be a saving-moment or a damming-moment for my human existence. No matter how true it is that man lives in time, still that time is not a garment sewed from many disparate patches; it is not to be conceived of as though moment B has no intrinsic connection with moment A. When we act in a personal way, we gather our whole life together. Somehow we possess our human existence totally in all the changing moments of time. I can actually put my whole life together into

each of its moments—and in each of them either wholly gain it or wholly lose it.  

The experience of the exercitants is flanked by the framework of the Principle and Foundation and their sinful situation. The historical mission of Christ which culminates on the cross invites the retreatants to order their loves anew as partners in that same mission. That is why, at the completion of the first week of the SE, Ignatius makes the exercitants ask Christ: “What ought I do for you”?

Likewise, formation programs for partnership in Jesuit education have to lead educators into discovering anew or for the first time their deepest desires. The first goal of such programs is to make educators ask the question about what they ought to do with their lives as partners of the common mission of the Jesuit school where they work. In other words, they are invited to bring their deepest desires in life—where their vocation manifests itself—to their professional life. Conversely, they are called to make their professional endeavor inform their lives at large and become a meaningful aspect of their vocational search.

3.4 – Learning and Mentoring Communities

Jesuit schools need partners in their mission and not mere executioners of pre-decided and agreed-upon educational directives, style and goals. In order to achieve that end, they design formation programs with different formats. Following in the footsteps of Ignatius in the first movement of the SE, Jesuit schools have to provide educators with an environment where freedom,

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confidence and love reign. The identity and integrity of educators depend upon their understanding of who they are and what fits their selfhood.

Jesuit schools willing to design formation programs learn from the SE that self-knowledge is critical to allow their educators to get in touch with their deepest desires. Therefore, formation programs to form partners in the common mission of Jesuit schools have to lead educators into a journey of fearless self-examination and self-discovery in an atmosphere of freedom, confidence and love. Hence, educators will have the ability to order their interests, be in touch with their deepest desires and open themselves to the end for which they are invited as partners and co-agents.

Parker Palmer argues that educators teach who they are. This is true beyond the realm of explicit academic activities such as, for example, lectures in a classroom. As a matter of fact, the way educators feel they belong to the school community affects their sense of connectedness to the students in particular and to the mission of the school at large. Jesuit schools that face the challenge of forming partners for their common educational mission should allow educators to be faithful to their true self. Palmer understands identity as an evolving nexus where all the forces that constitute my life converge in the mystery of self: my genetic makeup, the nature of the man and woman who gave me life, the culture in which I was raised, people who have sustained me and people who have done me harm, the good and ill I have done to others, and to myself, the experience of love and suffering—and much, much more. In the midst of that complex field, identity is a moving intersection of the inner and the outer forces that make me who I am, converging in the irreducible mystery of being human.13

Integrity is the other aspect of Palmer’s search for teachers’ self-identity. Not only are educators encouraged to look at the totality of what constitutes them as persons, but they are also invited to work on a synthesis that allows them to function as unified persons. Palmer understands integrity as whatever wholeness I am able to find within […] my life. Integrity requires that I discern what is integral to my selfhood, what fits and what does not—and that I choose life-giving ways of relating to the forces that converge within me […]. By choosing integrity, I become more whole, but wholeness does not mean perfection. It means [the process of] becoming more real by acknowledging the whole of who I am. […] Identity lies in the intersection of the diverse forces that make up my life, and integrity lies in relating to those forces in ways that bring me wholeness and life rather than fragmentation and death.14

Jesuit schools pave the way for identity and integrity when they become learning and mentoring communities for their educators. As seen in Chapter Two, adult education happens best when it takes into account people’s need to make meaning of their ever-changing experiences and transitions in life. Learning and mentoring communities serve as guides which both support and challenge their members during that learning process. Mentors challenge learners to examine their conceptions of self and the world around them in order to formulate their own existential synthesis vis-à-vis their surrounding reality. Mentors also support learners by offering them a frame of reference that makes them feel safe in their search for identity and integrity.

In the SE, the opening statement of Ignatius’s Principle and Foundation offers such frame of reference to the exercitants during the first week of the retreat and beyond. In Chapter Four, I show how the work accomplished by the

14 Ibid., 318.
first movement of the SE needs to be completed by the notion of service to the cause of Jesus Christ, which actually is diakonia to someone with whom the retreatants construct a bonding relationship. The exercitants’ deepest desires are translated into the will to be at the service of Jesus Christ. Programs which aim at forming partners in Jesuit education need to offer educators the means with which they can inform their vocational desires toward service or diakonia to the common mission of Jesuit education. I contend in Chapter Four that the desire to serve arises from the contemplation of the ideal of the person whom Jesuit schools want to educate.

The first task of mentoring communities is to welcome the discoveries of their members as when one listens to the dreams of marching pilgrims in a journey to a shrine. The complementary task to this one is to nurture their members’ sense of purpose and vocation by inviting them to translate their desires into an answer to the question: “What ought I do”? Schools as learning and mentoring communities operate according to the characteristics that Peter Senge uses to define learning organizations. They are “organizations where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured [and] where collective aspiration is set free.”

Indeed, the process of appropriation of one’s selfhood is not individualistic. Educators work together in schools and within schools’ departments. For instance, they form discussion groups about curriculum crafting.

participate in committees at different levels and with various purposes, and get involved in events that many times cross rigid lines of academic or administrative demarcation. Andy Hargreaves argues that teaching in a (post)modern world and in knowledge societies needs to prepare men and women for creativity and ingenuity with others and for the advancement of both the private and the common good. Knowledge societies are in fact learning societies, which means that they aim to be restless in their capacity to initiate and cope with change. I contend that the formation programs to be undertaken by Jesuit schools need have those same goals in mind. Therefore, teaching educators to be partners in the common mission of Jesuit schools involves “collaborative work and discussion among the schools’ professionals; a strong and consistent focus on teaching [forming] and learning within that collaborative work; and gathering assessment and other data to inquire and evaluate progress and problems over time.”

Sharon Parks has a similar approach to schools as pivotal institutions for mentoring in today’s world. Schools are expected to form people who are capable of interacting with others, especially where societies become more pluralistic and culturally diverse. Parks states that: “As society becomes more complex, extended education becomes increasingly necessary to meet the needs of the

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17 In a 1996 report entitled Learning: The Treasure Within, UNESCO sets the tone about education in the era of globalization: “Traditional responses to the demand for education that are essentially quantitative and knowledge-based are no longer appropriate. It is not enough to supply each child with a store of knowledge to be drawn on from then on. Each individual must be equipped to seize learning opportunities throughout life, to broaden his or her knowledge, skills or attitudes, and to adapt to a changing, complex and interdependent world.” To this end, UNESCO proposes four fundamental types of learning, namely: learning to know, learning to do, learning to live together, and learning to be. This chapter of mine emphasizes the importance of “learning to be” by being in touch with one’s own deepest desires.
workplace, and an informed, broad, multicultural perspective combined with the capacity for critical, connected and contemplative thought becomes increasingly vital for the functioning of democratic societies.”\textsuperscript{18}

Educators need training and formation programs that allow them to achieve those goals through their educational endeavor, and the dynamic of the SE can provide for such an intentional formation process. The goal is to empower educators to overcome a dichotomy still present in certain approaches to formal education. This dichotomy proposes that schooling is restricted to empirical knowledge about the world and does not have to do with human meaning-making activities. Unveiling the influence of Kant’s philosophy in some areas of scholarship in the field of education, Parks denounces that “[t]he phenomenal can be known, but noumenal reality cannot. And if it cannot, the reasoning goes, then questions of meaning, morality, ultimacy, and faith—although surely important—stand outside the realm of ‘knowledge’ and are beyond [or irrelevant to] the work of the academy.”\textsuperscript{19}

Globalized and (post)modern knowledge societies, however, as Hargreaves refers to our ever-learning and ever-changing societies, call for another approach to education in which knowledge is never separated from culture and where schools mentor educators and students to find their own place and role in their environments. Instead of pretending to educate out of nowhere, “aseptically and objectively”, schools are invited to educate from many different “wheres.” Therefore, schools are to be nurturing communities that form by

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\textsuperscript{18} Sharon D. Parks, \textit{Big Questions, Worthy Dreams: Mentoring Young Adults in Their Search for Meaning, Purpose and Faith} (San Francisco: Jossey-Bass, 2000), 158.

\textsuperscript{19} Ibid., 160.
inviting educators: 1) to be in touch with their frame of reference or principle and foundation; 2) to freely and fearlessly explore their own identity and integrity as do the SE with the meditations about sin; and 3) to ask the question about what their deepest desires teach them about their mission in the world. It is in this sense that Parks calls schools places for the formation of faith. She explains that:

This way of understanding our search for truth recomposes the relationship of the academy to issues of transcendent meaning. The reified boundary between empirical truth and questions of value, meaning and faith that has characterized (if not tyrannized) the academy is, in principle, dismantled, and the whole reality becomes the concern of the academy in its commitment to truth.20

Like Parks, Kenda Dean and Ron Foster also do research in the field of pastoral ministry. They analyze the requirements to form a community of partners who share a common mission. First and foremost, it is about igniting people’s desires to “share the mantle” as co-agents of a common accomplishment.

The appointing of the seventy elders is not only a revolutionary event for Moses; it transforms Israel as well. No longer free to ride on the coattails of their great leader as spectators to the holy drama, Israel’s elders step up and assume their rightful place in the formation of a holy people. In so doing, they relieve Moses of the burden of being the lone soul tender for the people of Israel. In sharing the mantle at the tent meeting, God calls Moses to step back and others to step forward.”21

There is a correlation between what Jesuit schools want to accomplish for students through their educators and what they aim to accomplish for their educators. Jesuit schools want to convey the idea of learning as a wholesome way of life rather than the mere passing on of knowledge and skills. Therefore, Jesuit

20 Ibid., 163.
Schools need to form educators to learn how to learn so that they can teach how to learn in a wholesome way. The challenge is to educate and form educators to become aware of who they are and what they ought to do with their lives in general and their professional lives as educators in particular.

I turn now to the aforementioned insight of Dean and Foster to reconnect the notion of schools as mentoring communities with the main thesis of the dissertation. Therefore, formation programs to train faculty and staff in the tradition of Jesuit education need to appoint them as partners of a common mission. This approach begins by inviting educators to be in touch with their deepest and truest desires. It is a transformation of the educational process because educators are no longer free to ride on the coattails of the traditional Jesuit leadership for identity and mission as spectators of the holy drama of education. They are invited instead to step up and assume their rightful place in the formation of a wholesome learning and mentoring—including self-mentoring—community. In so doing, educators relieve the Jesuit leaders from the burden of being the lone soul tenders of the schools. In “sharing the mantle” at the core of the schools’ highest responsibilities with respect to personal and communal principle-and-foundation-related reflection and practices, educators are invited to step forward.

3.5 – Emphasis on Communities

Exercitants constitute a learning community with their personal directors during the experience of the SE. Moreover, retreatants and directors are members
of the Church community at large, past and present, and share the common purpose of becoming more faithful disciples of Jesus Christ through the making of the SE. Therefore, Ignatius proposes his Principle and Foundation without fear of receiving opposition to his doctrine. But how can Jesuit educational institutions become learning and mentoring communities for those who work in them?

Research in educational change has often focused on how schools can be understood as organizations. On the one hand, schools are hierarchical and bureaucratic organizations much as any other. They operate within a clear chain of command in place, regulations and means to enforce them, and a system of checks and balances and evaluation which oversees that the entire machine moves smoothly and goals are achieved. On the other hand, schools have a unique characteristic, namely, that their top administrators are neither the main actors nor the experts in the principal activity and raison d’être of schools, that is, direct teaching in the classroom. In many cases, there is tension between top-down administrative guidelines and the struggle for growing teaching autonomy. Schools are indeed organizations, but need a theory of organization of their own with emphasis on community building and collaborative, consultative leadership.

The nature of schools itself makes them function differently from other organizations on several levels. For example, schools have multiple goals, which creates a complex environment and multiplies the developmental challenges for those who are part of them. Moreover, participants have multiple roles, even conflicting ones. Planning and administrative management usually cannot attain high levels of efficiency because of the many variables that make one day at
school very different from another. Therefore, decision-making processes vary enormously, allowing for constant pendulum movement between central autocracy and peripheral autonomy. Level of participation and commitment of stakeholders can be volatile and multidirectional, which also leads to less rigid structures. With respect to the use of technology, schools demand different “models of production” to respond to the different tasks they have to accomplish. Economic reality also varies because public schools, for example, draw on resources that depend on political alliances and interests, unlike private businesses that raise money to fund their own initiatives and face operational expenditures. Evaluation of educators poses its challenges as well because commonly-used criteria for professional performance assessment do not always apply to faculty due to the nature of their work. Finally, students as reference “objects” of the schools cannot be considered either products or clients. After all, they are full-right members of the schools understood as organizations, at least in the sense that is true to faculty and administrators.22

Thomas Sergiovanni chooses “community” as the metaphor of choice to understand schools. Shifting from organization to community affects not only the ways in which faculty, administrators, students and families relate to one another, but also the leadership style. Instead of relying primarily on bureaucratic authority or personal charisma, the driving force of school leadership is a set of shared goals to which each member of the community contributes. As Sergiovanni writes:

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Both the organization and the community metaphor ring true for certain aspects of how schools function. But it makes a world of difference which of the two provides the overarching frame.

Organization is an idea that is imposed from without. [...] Organizations use rules and regulations, monitoring and supervising, and evaluation systems to maintain control over teachers.

Communities are not defined by instrumental purposes, rationally conceived work systems, evaluation schemes designed to monitor compliance, or skillfully contrived interpersonal climates. Communities are defined by their centers. Centers are repositories of values, sentiments, and beliefs that provide the needed cement for uniting people in a common cause.”

In sum, to conceive of schools as learning communities means that schools are expected to become networks of belonging for people who come together to accomplish multiple tasks, which nonetheless evolve around the unifying goal of quality education. Faculty, administrators, students and their families are connected to one another by a sense of mutual responsibility toward the common goal of education. Sergiovanni explains that in many schools, “connections are understood using the narrative of social contracts. [However, in] schools that are becoming learning and caring communities, connections are understood using the narrative of social covenants.”

Social covenants involve loyalty, whereas social contracts do not rely on it necessarily. Examples of covenantal institutions besides schools are families, civic associations, faith communities and friendship. Schools have become even more structured around the narrative of social covenant because of the trends of (post)modern societies. Post-modernity trends exert influence especially when they appeal to democratic and inclusive ways to share ideas and take pluralism

24 Ibid., The Lifeworld of Leadership: Creating Culture, Community and Personal Meaning in Our Schools (San Francisco: Jossey Bass, 2000), 60.
into account when it comes to working together. Moreover, unlike organizations
where the narrative of social contracts prevails, schools and social-covenant-ruled
communities do not look at consumer satisfaction only as a strategy to keep
business afloat. Organizations ruled by the narrative of social contracts emphasize
the benefits that they earn from the service they provide. Communities ruled by
the narrative of social covenant emphasize the benefits that they provide to the
ones they serve.

Sergiovanni presents eight conditions for the community metaphor to
evolve in the direction of the narrative of social covenant: 1) schools need to be
redefined as networks of people and ideas rather than structures of brick and
mortar; 2) their goal is to create communities nested within communities,
neighborhoods within cities and schools within schools across the educational
landscape; 3) common fundamental values is what ties schools together; 4) it is
necessary to cultivate loyalty to one’s own school community and to the larger
community of schools; 5) it is necessary to protect the personal rights of students,
parents, teachers and administrators; 6) personal rights have to be linked with
responsibilities within a framework of commitment to the common good; 7)
families, faculty and administrators need freedom to choose the kind of school
they wish to join; 8) commitment to both personal rights and shared
responsibilities toward the common good provides the basis for moral
leadership.25

In sum, Sergiovanni chooses people over structures and emphasizes that
careful consideration of what persons need must come before organizational

25 Cf. ibid., 72-73.
structures. Such a commitment to people echoes the focus of the dynamic between the director of the SE and the retreatants. Despite the fact that Ignatius goes to great length to describe the specific features of the weeks of the retreat, namely, for example, the number of days to be consecrated to each one of them, the number of exercises to be given on each day, remarks about food and even the amount of light or outdoor activities that the retreatants should enjoy or abstain from, the only decisive criterion to regulate all of this is what is best for the one who takes the SE. Therefore, just as in the conditions listed by Sergiovanni, exercitants and their director form a learning community during the retreat in which mutual confidence and freedom are the guiding principles of operation. The wisdom that comes from the SE and that is echoed by Sergiovanni’s conditions is twofold: the primacy of respect for people’s processes and the need for community building where shared desires can be agreed upon and translated into action.

3.6 – The Challenges of Learning and Mentoring Communities

Jesuit schools need to take into account the challenges of becoming learning and mentoring communities when they design formation programs to invite educators to share in the common mission of Jesuit education. On the one hand, those formation programs are leadership initiatives in which leadership is understood as a management function according to the vertical dynamics of social contracts. Therefore, planning, directing and controlling tasks prevail. On the other hand, formation programs also operate out of the logic of social covenants,
in which leadership is seen as a social function that requires educators’ participation, that is to say that they both influence and are influenced by the formation programs, and determine and are determined by their outcomes.

Understanding schools as learning and mentoring communities challenges and enhances the task of forming educators on different levels. The structure of formation and training becomes less hierarchical and the methods emphasize more teamwork than individual performance. But the main challenge resides in the transformation of the relationship between the schools and their educators, especially because it is necessary to remain open for constant adaptation and change. The concern for control that underlines training through the lenses of leadership understood as management function—for example, motivate others, organize the work for others, set the goals and be accountable for the outcomes—gives way to emphasis on formation of and learning by all the members of the school community on behalf of its common mission. Based on the aforementioned work of Peter Senge, the following are some of the major features of learning communities and challenges for them at the same time.

Systems thinking occurs when the members of the learning and mentoring community view their own role within their teamwork, their teamwork as part of the community, and the community as part of society at large. At the heart of systems thinking is an awareness of the interconnectedness and interdependency of persons in teams, teams in the school (for my purpose in the dissertation), and schools in society. To take a systems-thinking perspective also means to function personally and communally to optimize the organization as a whole.
Personal mastery means charting a course of development that leads to a special level of proficiency through life-long learning. This approach to learning does not refer only to those areas related to the immediate and intrinsic product or service of the organization, team or personal expertise, but rather includes personal and interpersonal existential enhancement, personal awareness and emotional maturity. Moreover, it encompasses an ever-growing understanding of the ethical dimension of the organization. Personal mastery allows people to realize their unique contribution insofar as they deepen their understanding of and commitment to their own vocation expressed in tandem with others who share the same pursuit. Therefore, in the case of Jesuit schools, personal mastery and systems thinking work hand in hand and are beneficial for the educators, their teams, the school community and society at large.

Mental models refer to the ingrained assumptions and generalizations that people use to explain how their communities work. Mental models enable members of any organization to seize new developments and changes and act upon them on the personal, team and community levels. Negatively, mental models can also prevent openness and adaptation, especially when embedded explanations pretend to be able to anticipate all possible outcomes, even of unforeseeable circumstances. In the learning and mentoring community, mental models are freely shared, critically discerned and revised as necessary in order to allow its members “to desire and choose only that which is more conducive to the end for which they are created.” If an organization is to become a learning and mentoring community, it ought to overcome the fear and anxiety that prevents its
members from challenging established ways of thinking and acting. In Jesuit schools, the mental models that survive scrutiny are those that view educators from a systems perspective, overcome a bias for action which prevents discernment, and help stakeholders of the common educational mission to be in touch with their deepest desires.

Shared vision is another feature of learning and mentoring communities that I draw from Senge’s work. Goals, values and mission will have the most impact on behavior in any organization insofar as they are widely shared and owned by all. Senge explains that the larger picture of the future emerges from the partial views of persons and teams. A shared view produces a much higher level of sustained commitment than is possible when the view is imposed from above. Systems thinking is necessary again in order for shared views to translate into coordinated action involving all of the members of the learning and mentoring community.

Lastly, Senge speaks of team learning. Teams exist in all types of organizations. They are called departments, divisions, units or committees. Often, one person is part of several teams within the organization. Team learning is another important feature of learning and mentoring communities. It has to do with improving practices to achieve better performance. As seen in Chapter Two, however, change in practices is best accomplished when backed by review of both the processes that generate practices and the premises of which the processes are derived. Of particular interest when studying team learning is the phenomenon of defensive routines, which are behavior patterns among teams which prevent them
from making an accurate appraisal of their functioning, keep them from learning, and ultimately compromise their performance or the service they provide.

Schools in general and Jesuit schools in particular face challenges of their own. Unlike in corporate organizations that function primarily out of the logic of social contracts, commitment to continuous improvement might easily become endless improvement. If that happens, change may come at the expense of disregarding values and traditions which are close to the core identity and mission of the schools. Moreover, schools and educators have to deal with job-related situations that are unique to the field of education. Consequently, all the features of learning organizations raised by the work of Senge need to be suited to the reality of Jesuit schools. Chapter Four addresses this concern in a very specific way, but, for now, it suffices to quote the doctoral dissertation of Sônia Magalhães, who presents some key components that can contribute to create a learning culture within the school environment.

Schedules and assignments should allow time for collective inquiry. Thus schools should provide time for teachers to work and reflect together. Collective inquiry may be strengthened by more democratic forms of governance [such as] groups composed of administrators, teachers, parents and community members [who] would act as champions for extended inquiry. The discussion about the possibility of transforming schools into learning organizations has a strong link with two main components of schools life: leadership and teachers’ work.26

The book of the SE is a guideline for the spiritual experience which usually takes place during the thirty-day retreat as it was conceived by Ignatius of Loyola. During the retreat, Ignatius empowers the exercitants to understand

themselves as partners of the common mission of the Church, which is to follow Jesus Christ in announcing the Good News for the life of the world.

Therefore, in this dissertation, I read the SE as a formation program for partners in a common mission. I then draw four operative principles from their pedagogical wisdom which serve as guidelines for training programs that aim at forming partners in the common mission of Jesuit schools. The literature in learning and mentoring communities that I review in this chapter translates the pedagogy of the first week of the SE into organizational language.

The first movement of the SE allows retreatants to be in touch with their deepest desires. Accordingly, Jesuit schools understood as learning and mentoring communities need to offer their educators the kind of community environment which allows them to ask about what they ought to do for Jesuit education.

3.7 – Conclusion to Chapter Three

The answer to the question “Who am I?” comes as a result of a life-long search for identity, integrity, meaning, vocation, purpose and mission. Jesuit schools need educators who discern and embrace for themselves a sense of identity and mission in their personal and professional life. The first movement of understanding who I am leads to one’s own deepest desires.

Such an interior journey is not without obstacles though. The SE take this reality into account by providing the exercitants with a framework of freedom, confidence and love. The retreatants can explore without fear their deepest desires because they know that they are created out of love and for love. Therefore, the
abundance of choices in life reveals itself as an opportunity “to desire and choose only that which is more conducive to the end for which we are created.” Not even what harms creation, reflects our refusal to love and is morally wrong, because contrary to the common and personal good, can prevent human beings from being in touch with their deepest desires and discovering their vocation in the world. In other words, sin does not trump the truth that “human beings are created to praise, reverence, and serve God our Lord, and by means of doing this to save their souls” and that “the other things on the face of the earth are created for the human beings to help them in the pursuit of the end for which they are created.”

Like the SE, formation programs to train educators as partners of the common mission of Jesuit schools need to allow them to be in touch with their deepest desires. Jesuit educational institutions want to form persons who can freely ask the question “What ought I do?” in the context of the Jesuit tradition in education. To achieve this goal, Jesuit schools need to become safe spaces where freedom, confidence and love reign.

I contend that Jesuit schools can best become such spaces when they operate out of the dynamics of learning and mentoring communities. Persons—educators, professionally speaking—can then flourish after exploring the assets and limitations of their personal and professional lives in order “to desire and choose only that which is more conducive” to their fulfilling what they want to be and do with their professional lives at a Jesuit educational institution.

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The first movement of understanding who I am, which leads to one’s own deepest desires, is not the end of the journey, however. Human beings’ sense of vocation also comes from what inspires them from without and motivates them to serve a cause that is larger than themselves. Hence, Chapter Four studies the second movement of the SE and draws some of its implications for the formation programs that aim to form partners in the common mission of Jesuit education.
Chapter 4 – How Can a Noble Vision Inspire Me? The Second, Third, and Fourth Weeks of the SE.

The second movement of the SE is centered in Jesus Christ. It corresponds to the second, third and fourth weeks of the SE. The exercitants are introduced to a new modality of prayer, namely, the exercise of contemplation. To contemplate a scene of the life of Jesus Christ—Ignatius uses the word “mysteries” to refer to those scenes—the retreatants have to use their imagination and place themselves in the context of the event that takes place in any chosen passage of the gospel narratives. Therefore, imaginatively, they see, hear and consider what people do during the scene with respect to dialogues and interactions among the characters. At the same time, they pay attention to the effects that the contemplated mysteries have on them. Vocational discernment during the second movement of the SE is based on the constancy of the motions, affections or impressions that the different contemplations produce in the exercitants’ soul. Therefore, after having guided the retreatants to look for their deepest desires throughout the first movement of the SE, Ignatius presents them with the inspirational life project of Jesus Christ. During the second movement of the SE, the exercitants continue to discern their vocation by letting their deepest desires be inspired, formed, informed and transformed by the life of Jesus Christ.

Echoing the process that guides exercitants to move from the first to the second movement of the SE, Chapter Four briefly surveys the educational documents that constitute the core of the Jesuit tradition in education as a major source of inspiration to those who work in Jesuit educational institutions. Those
documents are the *Ratio Studiorum*, the *Characteristics of Jesuit Education* and the *Ignatian Pedagogy: A Practical Approach*. Formation programs that aim to form partners in the common mission of Jesuit schools need to be inspirational. Therefore, the answer to the question “What ought I do?” (Chapter Three) is now shaped by the educators’ desires to serve and help advance the mission of Jesuit education as it is portrayed in those documents. I contend that educators are to be given the opportunity to approach and become familiar with the legacy of the Jesuit tradition in education in a contemplative way so that they can be inspired by them. To “contemplate” those documents means a sort of learning experience that enables educators to feel inspired to serve as partners in the common mission of Jesuit education. The third operative principle that is required of those formation programs is the Greek word for service, that is, *diakonia*.

4.1 – “Moved with a desire of serving you”

The introductory exercise to the second movement of the SE is “The Contemplation of the Kingdom of Jesus Christ: The Call of the Temporal King, as an Aid toward Contemplating the Life of the Eternal King.” It marks the transition from the first week of the SE to the second, third and fourth ones. This exercise has two parts. The first one is the contemplation of a temporal king who invites all his people to help him accomplish what he wills and desires. The second half of the exercise applies the same contemplation to the call that Jesus Christ addresses to his disciples.

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The temporal king is on a mission and wants to associate as many subjects as he can to the achievement of his goals. But Ignatius makes it clear to the exercitants that the temporal king wants to have partners and not only executioners of a pre-planned strategy. That is why the king states his project clearly and frames his invitation with a notion of shared desires, wishes and mission. The retreatants are invited to contemplate the temporal king speaking to all his people with the following words:

My will is to conquer the whole land of the infidels. Hence, whoever wishes to come with me has to be content with the same food I eat, and the drink, and the clothing which I wear, and so forth. So too each one must labor with me during the day, and keep watch in the night, and so on, so that later each may have part with me in the victory, just as each has shared in the toil.²

Ignatius assumes that the project of the temporal king not only can resonate with the royal subjects’ deepest desires but also inspires new desires in them because of its noble vision and mission. In the first week of the SE, Ignatius makes the retreatants ask what they ought to do for Christ out of the experience of being in touch anew with their re-created and redeemed freedom. Now, in the second movement of the SE, Ignatius uses the parable of the temporal king to suggest that the exercitants will find the response to that same vocational and programmatic question by embracing the mission of Jesus Christ. As a matter of fact, after the call of the temporal king, Ignatius invites the retreatants to consider how compelled they are to respond to a king so generous. Like the other contemplative exercises in the SE, the goal goes beyond achieving a deeper

² Ibid., The Spiritual Exercises, [93] 53-54 (emphasis added).
knowledge of Jesus Christ, his person, project and mission; the goal is also to empower the exercitants to better follow the Lord. The grace to be asked for during the second week of the SE is indeed “an interior knowledge of Our Lord who became human for me, that I may love him more intensely and follow him more closely.” In other words, the exercise of contemplation engages the retreatants insofar as it fosters an inter-personal relationship between them and Jesus. At the same time, the exercitants pay attention to the internal motions that the scenes they contemplate produce in them in order to discern their personal call to follow Jesus.

In the first part of the parable of the temporal king, Ignatius appeals to the retreatants’ affections and makes them realize that they desire to put themselves at the service of the imaginary king as grateful and worthy knights. They are compelled to serve because they have been inspired by the call of the temporal king and his sense of agency and resolve. The king’s project resonates with their deepest desires and shapes them in a new way.

In the second part of the same exercise, Ignatius reasons with the exercitants that if they “give consideration to such a call from the temporal king to his subjects, how much more worthy of [their] consideration it is to gaze upon Christ our Lord, the eternal King, and all the world assembled before him.” The retreatants meet Jesus again in prayer, but this time the Lord is not on the cross as he was in the colloquy at the end of the third exercise of the first week of the SE.

3 Ibid., [104] 56.
4 Ibid., [95] 54.
As an inspiring leader, Jesus is to be contemplated passing by and preaching at the various “synagogues, villages and castles”\(^5\) that he visited.

The exercise of the Kingdom concludes with a personal offering made by the retreatants. At this point of their journey into the SE, the retreatants are invited to commit themselves to a close discipleship to the Lord. More precisely, the exercitants will ask for the God-given gift of close discipleship to Jesus, the eternal King, for the remainder of the second week of the retreat. The question “What ought I do for Christ?” that rises from the first week of the SE begins to be answered by one’s offering to become a partner who shares in the mission of the eternal King. A short excursus through another Ignatian document helps establish the connection between *desire* and *diakonia*.

In the *Constitutions of the Society of Jesus*, Ignatius follows the same pedagogical movement from personal deepest desires to commitment to service to the mission of Jesus Christ. Those who are admitted to the first stage of the formation program of the Society of Jesus, namely, the Jesuit Novitiate, are to be asked many questions about their own deepest desires or, in other words, about the lifestyle that they want to embrace. Only after having probed the candidates’ desires will Ignatius allow them to make first vows as a Jesuit. Then, Ignatius frames the text of the vows with a commitment to serve God. The two operative principles of *desire* and *diakonia* are at work in the following paragraphs of the Constitutions of the Jesuit order as Ignatius wrote them:

\[\text{[W]hen the time of the probation has elapsed,}^6\text{ if the candidate is content and desires to be admitted thus as a professed or a coadjutor or a scholastic,}\]

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\(^5\) Ibid., [91] 53.

\(^6\) Ibid., 53.
but there is doubt on the part of the Society about his talent or conduct, it will be safer to require him to wait another year, or whatever time will seem wise later on, until both parties have become content and satisfied in our Lord.

It is likewise highly important to bring this to the mind of those who are being examined (through their esteeming it highly and pondering it in the sight of our Creator and Lord), to how great a degree it helps and profits one in the spiritual life to abhor in its totality and not in part whatever the world loves and embraces, and to accept and desire with all possible energy whatever Christ our Lord has loved and embraced. [...] That is to say, they desire to clothe themselves with the same clothing and uniform of their Lord because of the love and reverence which He deserves [...] and their desire to resemble and imitate in some manner our Creator and Lord Jesus Christ, by putting on His clothing and uniform, since it was for our spiritual profit that He clothed Himself as He did. [...] Therefore the candidate should be asked whether he finds himself in a state of desires like these which are so salutary and fruitful for the perfection of his soul.

In a case where through human weakness and personal misery the candidate does not experience in himself such ardent desires in our Lord, he should be asked whether he has any desires to experience them. . . .

Those who, after finishing their first probation and experiences through two years [of the Novitiate …], will make their vow […] according to the following formula:

Almighty and eternal God I, N, […] moved with the desire of serving You, […] vow to Your Divine Majesty perpetual poverty, chastity, and obedience in the Society of Jesus; . . .

This brief detour by the Constitutions of the Society of Jesus allows me to show in greater detail how Ignatius guides the retreatants to make a personal

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6 The first probation corresponds to the first two weeks of the Novitiate.
7 The legacy of Christian asceticism clearly gives the tone of Ignatius’s remarks. However, Ganss explains that Ignatius does not value those virtues of lowliness for their own sake. “Rather, Ignatius hopes that a candidate [to the Society] will become so eager to bring greater glory to God, and to be so like Christ in apostolic endeavor, that he will accept anything that will lead him toward these goals, whether it brings pain or pleasure, blame or praise. Magnanimous love of Christ will impel him to apostolic works in a persevering manner, and he will not abandon them merely because something unpleasant is involved. Pain and hardship are usually evil and one does not choose them for their own sake. But one will accept them or at least tolerate them as means to a higher goal he truly desires, or else he will miss the goal” George E. Ganss, SJ, The Constitutions, 107-108. In the SE, the same doctrine will appear in the exercise Ignatius calls “The Three Ways of Being Humble” [165-167].
8 Ignatius of Loyola, The Constitutions [100], [101], [102] 107-109, and [537], [540] 241 (emphasis added).
offering at the conclusion of the contemplation of the Kingdom. Their desires have encountered a source of inspiration in the invitation that the eternal King, Jesus, addresses to his disciples. Accordingly, moved with the desire of serving the Lord wholeheartedly, the exercitants will offer themselves for the labor, which is to be embraced as a common mission. Ignatius calls it an offering of “greater worth and moment” for those who want “to distinguish themselves in total service to their eternal King and universal Lord” and invites the retreatants to use the following formula:

Eternal Lord of all things, I make my offering, with your favor and help. I make it in the presence of your infinite Goodness, and of your glorious Mother, and of all the holy men and women in your heavenly court. I *wish and desire*, and it is my deliberate decision, provided only that it is for your greater service and praise, to imitate you in bearing all injuries and affronts, and any poverty, actual as well as spiritual, if your Most Holy Majesty desires to choose and receive me in such a life and state.9

The contemplation of the scenes of the life, passion, death and resurrection of Jesus Christ, which constitutes the core of the exercises of the second, third and fourth weeks of the SE, nourishes in the retreatants their desire to put themselves at the service of the Lord. Moreover, it provides the specific contours of such a service, which will be determined by the process which Ignatius calls “election” (see Chapter Five). That is why “decision” (Chapter Five) follows “discernment” (Chapter Two), “desire” (Chapter Three) and “diakonia” (Chapter Four) as the fourth operative principle for formation programs that aim at training educators to become partners who share in the common mission of Jesuit schools.

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9 Ibid., *The Spiritual Exercises* [98] 55 (emphasis added).
4.2 – Contemplation as a Way of Learning

The transition from the first to the second movement of the SE is accompanied by a change in the way Ignatius wants the retreatants to learn from prayer. During the second, third and fourth weeks of the SE, contemplations are substituted for meditations. Ignatius believes that the second movement of the SE requires a way of learning that engages the exercitants’ imaginative faculties and abilities because the operative principle of “diakonia” presupposes an interpersonal relationship with Jesus and because contemplation is more conducive to establishing such a relationship.

However, Ignatius is conscious of the fact that there are people who are not ready for or willing to take such a deep commitment and alerts those who give the SE about it. In Annotation number 18, Ignatius confronts the situation with his characteristic candor:

The Spiritual Exercises should be adapted to the disposition of the persons who desire to make them, that is, to their age, education and ability. In this way, if someone who is uneducated or has a weak constitution will not be given things he or she cannot well bear or profit from without fatigue. . . .

Consequently, a person who wants help to get some instruction and reach a certain level of peace of soul can be given the Particular Examen [24-31], and then the General Examen [32-43], and further, the Method of Praying, for a half hour in the morning, on the Commandments [238-243], the Capital Sins [244-245], and other such procedures [238; 246-260]. Such a person can also be encouraged to weekly confession of sins, and if possible, to reception of the Eucharist every two weeks or, if better disposed, weekly. This procedure is more appropriate for persons who are rather simple or illiterate. They should be given an explanation of each of the commandments, the seven capital sins, the precepts of the Church, the five senses, and the works of mercy. . . .
But this should be done without going to matters pertaining to the Election or to other Exercises beyond the First Week. . . .

In other words, Ignatius wants all exercitants to become men and women who can be in touch with their deepest desires, discern their interior movements and order their affections as they choose only what is more conducive to the end for which they are created. The Principle and Foundation and the first week or movement of the SE are for all. Since, for the purpose of this dissertation, I read the SE as a formation program for partners in a common mission, I contend that Ignatius engages two of my four operative principles for all kinds of retreatants. All are invited to make some personal response to the material considered in meditative prayer during the first movement or week of the SE through discernment and desire.

Therefore, on the one hand, the goal for all kinds of exercitants is for them to become reflective practitioners who discern those desires which will be more conducive to the end for which they are created. On the other hand, contemplation understood as the typical way of praying and learning from prayer during the second movement of the SE is reserved for some. Ignatius clearly lists the exercises that should be given to all. They are exercises of the first week. Moreover, he prevents directors from giving the exercises concerning the Election (see Chapter Five) or those beyond the first movement, which are precisely the contemplation of the mysteries of the life, passion, death and resurrection of Jesus Christ.

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For Ignatius, contemplation is a more demanding way of praying and a more complex way of learning because it engages the retreatants in a more progressively multi-layered and wholesome interpersonal relationship with the Lord. Just as the parable of the temporal king suggests, the aspiring disciples of Jesus are invited to share in both the burdens and the victories of Christian discipleship. Such an increasingly profound commitment engages the principle of *diakonia*. It is the ideal of loyal service as a partner or stakeholder of a common mission which congregates king and knight in the first part of the parable and bonds Jesus and his disciples in the second. *Diakonia* functions as a hinge on which the exercitants’ deepest desires gain specific contours by contemplating Jesus’ words and deeds. Long periods of contemplation during the retreat lead to molding the retreatants’ deepest desires in a way that is more conducive to fulfilling them.

Gilles Cusson explains that:

The second Week, after the exercise of the Kingdom, will consecrate a lot of time to *contemplation* in order to be more practical, that is to say, in order to lead the exercitant to *make a decision under the divine motion*. The exercitant has to work on the continuing and realistic readjustment of his or her spiritual condition, according only to God’s eternal and ever-present perspective. The “graces” to be sought for will make even more precise the meaning of the exercise of contemplation on the double-level plane of intelligence and will: knowledge and love – contemplation and election. [...] The contemplation of the Kingdom itself functions as the *foundation* of all the subsequent exercises and will strongly highlight the two poles of the Ignatian dialectic, which separates and brings together objectivity and subjectivity, the universal and the particular. During the second week, these two poles are called *contemplation* and *offering*.  

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Contemplation is a way of learning that fosters a different level of engagement between the learner and the material to be learned. Actually, it engages a different set of the learner’s abilities in comparison with meditation. Contemplation creates a learning context that resembles an interpersonal relationship in which all persons involved are bound together. Drawing on Cusson’s analysis of the contemplative method of prayer, I argue that the learner experiences a much closer dialectic with the material to be learned than meditation can attain. Indeed, meditation facilitates an objective approach to learning something in which the material is more likely to remain outside of the learner, whereas what is learned in contemplation has more potential to become part of who the learner is.12

Ralph Metts studies the methodology of the SE and its translation into the Jesuit tradition in Education, especially in the recent documents about Jesuit education today, namely, *The Characteristics of Jesuit Education* and *Ignatian Pedagogy: A Practical Approach*. For Metts, educational activities in Jesuit schools should model the methodology that Ignatius uses to guide the retreatants in the SE. He concludes that contemplation uses the learner’s faculties of imagination, understanding and will, whereas meditation relies on memory, understanding and will.

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12 The steps of the contemplative form of prayer in the SE are: 1) place oneself in the presence of God; 2) briefly bring to mind and mentally review the scene that will be contemplated; 3) use one’s imagination to enter into the scene and place oneself present there; 4) ask God for the spiritual fruit to be achieved during the exercise of contemplation; 5) use one’s imagination to see, listen to and consider what people do in the scene; 5) discern God’s invitation by reflecting on the affections that speak to one’s heart, thus taking profit from them; 6) make a colloquy, which is a friendly spiritual conversation with God either in thanksgiving or praying for some grace needed.
Therefore, the difference between the two methods of prayer is the use of imagination, which allows the exercitants to place themselves at the event being contemplated. Conversing with current educational, psychological and learning theories, Metts explores, for example, Howard Gardner’s theory of multiple intelligences to back his analysis of Ignatian meditation and contemplation. In Metts words:

Ignatian meditation is a form of prayer which relies primarily on the two traditional academic intelligences, namely, Linguistic and Logical-Mathematical, as the principal means of learning. Both these intelligences are closely related to the [Geoffrey and Renate] Caines’ taxon memory and require predominately left hemisphere processing. Yet learning for Ignatius always involves the whole person, so that he insists that what has been theoretically learned and understood in prayer must be deeply experienced and felt by the retreatant through the use of the will. . . .

Ignatian contemplation stresses the use of six of Gardner’s intelligences; however, the primary intelligences for learning are now Spatial and Body-Kinesthetic intelligences rather than Linguistic and Logical-mathematical intelligences as in meditation. Clearly, Spatial and Body-Kinesthetic intelligences share similarities with the Caines’ spatial memory and employ right hemisphere processing techniques. […] Ignatius believed in this view of learning so strongly that he employs contemplation as the chief method of prayer throughout the last three weeks of the Spiritual Exercises. Thus, a retreatant uses contemplation as the primary learning methodology for the bulk of prayer during the retreat. One cannot help but observe that much of the change that occurs in a person making the Spiritual Exercises happens through the use of non-traditional academic intelligences, specializing in right hemisphere processing.13

The challenge for formation programs which aim to train partners to share in the common mission of Jesuit schools is to expose them to the core documents of the Jesuit tradition in education in a contemplative way. As in the contemplation of the mysteries of the life of Jesus Christ, the goal is to draw

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inspiration from those documents which, in turn, will move educators to serve a cause that is no longer alien to who they are.

4.3 – The *Ratio Studiorum (1599)*

The second part of this chapter (4.3, 4.4 and 4.5) briefly surveys the three documents that constitute the core of the Jesuit tradition in education. It is mainly informative about the history and content of those documents. However, it also suggests how to go about a contemplative way of learning from them. The first of those documents is the *Ratio Studiorum (Ratio, hereafter).*

The course of studies in a Jesuit school as it was conceived by the *Ratio* published in 1599 lasted ten or eleven years. The *Ratio* remained the only abiding legislation of Jesuit education until the suppression of the Society of Jesus in 1773. After the Jesuit order was canonically restored in 1814, there were many unsuccessful attempts to compose a new *Ratio.* The most accomplished project were the 1832 twenty-nine groups of rules—only one shorter than the original 1599 *Ratio*—which, however, have never been promulgated by a General Congregation.

In 1844, thirty years after the papal reestablishment of the Society of Jesus, the Jesuits ran ninety-three schools. The demands for a new *Ratio* remained until the 25th General Congregation of the Society of Jesus decided in 1906 that “a renewed redaction of the *Ratio Studiorum* is not to be put forward in the current

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14 The complete title in Latin of this famous book which became the guiding document of Jesuit education throughout the world is *Ratio atque Institutio Studiorum Societatis Jesu,* which translates into English as “The Plan and Methodology of Studies of the Society of Jesus.”
time.\textsuperscript{15} The same General Congregation determined that each Jesuit province crafted plans of studies for their own schools.

In the first half of the twentieth century, Jesuit secondary schools and universities followed the plans of studies that were written at the local level, namely, country, Jesuit province or school itself. During the same period, the 1832 tentative version of the new \textit{Ratio} concerned only the formation of future Jesuit priests. In 1941, however, the Superior General of the Jesuit order, Fr. Ledochowski, published a new document, which adapted the course of studies of Jesuits in formation to the new rules for philosophical and theological studies in the Catholic church that had been promulgated by the Pope Pius XI in 1931. This was the last document to be called \textit{Ratio Studiorum} when it was officially promulgated, with modifications, by another Superior General, Fr. Janssens, in 1954.\textsuperscript{16} Orientations for Jesuit secondary schools and colleges and universities worldwide came about only in the second half of the twentieth century. Fr. Arrupe officially approved \textit{The Preamble} in 1971, which was the introduction to the founding document of the Jesuit Secondary Education Association (JSEA) of the United States Jesuit provinces. But the defining documents in Jesuit education will appear only in 1986 and 1993 (see 4.4 and 4.5 below).\textsuperscript{17}

\textsuperscript{15} Cited in Luiz Fernando Klein, SJ, \textit{Atualidade da Pedagogia Jesuítica} (São Paulo: Loyola, 1997), 42 (my translation).

\textsuperscript{16} Since 1954, there have been three other major documents concerning the philosophical and theological education of Jesuits in formation: 1) Fr. Arrupe’s 1967 \textit{Normae Generales de Studiis}, echoing the \textit{aggiornamento} fostered by the 1965 decree \textit{Optatam Totius} of Vatican II on the training of priests; 2) Fr. Arrupe’s 1979 \textit{Normae Generales de Studiis}, attending the requirements of Pope John Paul II’s apostolic constitution \textit{ Sapientia Christiana} on ecclesiastical universities and faculties; and 3) the adaptations and complementary norms to Part IV of Ignatius’s 1540/1550 \textit{Constitutions of the Society of Jesus}, which were approved by the 34\textsuperscript{th} General Congregation in 1995. Cf. ibid., 44.

\textsuperscript{17} Cf. ibid., 45-50
According to the 1599 *Ratio*, the first three or four years of studies in a Jesuit school focused on students ages 10-13. They were called Lower Classes. In years 1 and 2, ten and eleven-year-old boys studied Latin grammar. They were divided in classes 1, 2 and 3, or elementary-, intermediate- and advanced-level classes. Each academic year had in fact the duration of roughly a slightly extended modern semester. Third-year students—age 12—studied pagan literature and formed the class of Humanities. Finally, year four—age 13—was called Rhetoric, and dedicated to the study of Greek and Hebrew.

The seven subsequent years of studies were called Higher Classes, divided into a three-year course in Arts or Philosophy for students ages 14-16, and a four-year program in Theology—ages 17-20. Subject matters in Philosophy were Logic, Mathematics, Physics, Metaphysics, and Moral Philosophy. After three years of studies, the students graduated with a bachelor’s degree. Another half year granted them the title of Master in Arts. Theological disciplines were Scholastic and Positive Theology, Bible, and Canon Law. Two extra years were necessary for the doctorate in Theology. Those among the students who applied to Holy Orders were ordained when they were 21 years-old or more.

“The *Ratio* is more a treatment of curricular organization and pedagogical procedure than of educational theory. Its seeds were planted by Ignatius in Part IV of the *Constitutions*. Eventually, the *Ratio* set up the first extensive school system in history, that is, an organization of individual schools in close connection with one another. Such a widespread system and its constant evaluating process is what made the Jesuits’ educational enterprise so successful and granted Jesuit education the place it has in histories of education.”

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Despite the lack of explicit educational theory in the document, the attentive reading of its rules\(^\text{19}\) reveals two main characteristics of the method of the *Ratio*. The first is active-learning and the second is a well-planned and structured progression of the subject-matters. Students learn through self-activity instead of merely listening to lectures, memorizing concepts and preparing for exams. Learning goes beyond the mere acquisition of information because it engages the natural powers and talents of the students, especially their capacity for critical thinking, who in turn become more interested in the disciplines they study. Moreover, the material covered obeys a rigorous order of presentation. Therefore, more complex content comes only after the students have exercised themselves in the use of the basics and proven themselves ready for the next stage in their training. John Padberg explains that

the progress of students came through a set program that the teacher and the students followed; the professors lectured frequently; the students engaged in academic exercises following the lectures; the students were divided into specific classes according to the state of their academic ability and preparation; each class had its own specific teacher attached to it and specific material which it had to get through; students moved up from one class to another after examinations. All of this involved the personal knowledge and concern of the teacher and helped the young student progress more surely and more quickly through the course of studies.\(^\text{20}\)

The challenge for the contemporary reader of the *Ratio* is to contemplate and get inspired by the vibrant learning atmosphere that characterizes the educational environment of the Jesuit school according to the various sets of rules of the *Ratio*. The academic exercises include debates among the students, lectures

\(^{19}\) See Appendix 3 for the Table of Contents of the *Ratio*.

given by them on different subjects and opportunities for creative writing. But the role of the teacher is critical in all of those exercises. In the words of Jenny Go:

The detail with which the *Ratio* spelled out how professors and teachers ought to teach and how students ought to behave shows us the importance, the priority, placed on the *formation of teachers and students*. Teachers’ work must reflect their best efforts toward doing the *magis*, that is, choosing the better, more effective means to help students grow. In this, however, *cura-personalis*, the personal care of students, will guide and modify generic norms. Now that more committed lay people are being incorporated into the Jesuit educational apostolate, formation of lay partners must be looked upon as an all-important organizational strategy to keep our schools and universities on course in the mission of “caring for souls.”

Therefore, formation programs that aim to form partners in the common mission of Jesuit education can use the *Ratio* as a means to inspire educators’ deepest desires to be at the service of students’ growth. For example, rule number twenty for all professors of Higher Classes reads as follows:

Finally, in all things, with the help of divine Grace, the professor should be industrious and constant in his work, and interested in having the students make progress in their lectures and also in their other literary exercises.

He should not show himself more familiar with one student than another. He should not look down upon any one of them. He should supervise the studies of the poor students as carefully as he does those of the wealthy. And he should devote himself in a special way to the progress of each individual student.

The rules of the *Ratio* tell educators exactly what to do and what to avoid. They were invaluable for the first generations of Jesuit educators who had to face the challenges of the newly-embraced educational apostolate. At the same time, the rules offer plenty of room for adaptation, which reflects consideration for the educators’ own experience. The fact of having rules underlines the characteristics

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21 Jenny Go, “Response to John W. Padberg,” in Ibid., 103-104.
of a common educational project among the several Jesuit schools that were founded during the first two centuries of the history of the Society of Jesus.

Adrien Demoustier explains that

The initial perspective [of the Ratio] was above all inspired by the principle according to which it is helpful for junior professors to be given precise instructions so that they can build upon them and make their own experience. Teachers need to know why they decide to do things differently from the directions they received and be prepared to be accountable for their own choices. Hence, they are expected to be able to justify their practice in the same precise and reasonable way that the rules were written. Everybody in the school then will benefit in their own way from people’s innovations and contributions to the previously established experience.\(^{23}\)

Paraphrasing the exercise of the Kingdom in the SE, formation programs that offer a contemplative approach to the Ratio have to make educators ask how good educators like themselves ought to respond to an educational project as inspiring as the one depicted by the Ratio. Furthermore, educators of Jesuit schools are invited to let the wisdom of the Ratio resonate within them and offer themselves wholeheartedly for the labor of Jesuit education.


At the end of the twentieth century, the Society of Jesus has reinforced and renewed its commitment to formal education. The SE provide the vision, principles and premises of Jesuit education, whereas the Ratio presents the frame of reference for the practices and content of what happens inside and outside the classroom of a Jesuit school and how school life is to be organized. But the

twentieth century, especially after the *aggiornamento* unleashed and sought by Vatican II (1962-1965), made the Society of Jesus realize that it needed a document on Jesuit education that could unpack the pedagogical premises of the SE on the one hand, and offer an inspiring contemporary compass for Jesuit educational institutions all over the world on the other.

Therefore, in 1986, *The Characteristics of Jesuit Education* (CJE, hereafter) was published and became the main source of inspiration and renewal for all Jesuit schools, as well as other Ignatian-spirituality-inspired educational institutions. The introduction to the document itself refers to the fact that the term “Ignatian” is broader in scope than the word “Jesuit”:

> To speak of an inspiration that has come into Jesuit schools through the Society of Jesus is in no sense an exclusion of those who are not members of this Society. Though the *school* is normally called “Jesuit”, the *vision* is more properly called “Ignatian” and has never been limited to Jesuits. Ignatius was himself a layman when he experienced the call of God which he later described in the *Spiritual Exercises*, and he directed many other lay people through the same experience; throughout the last four centuries, countless lay people and members of other religious congregations have shared in and been influenced by his inspiration. . . .

The description that follows is for Jesuits, lay people and other Religious working in Jesuit schools; it is for teachers, administrators, parents and governing boards in these schools. All are invited to join together in making the Ignatian tradition, adapted to the present day, more effectively present in the policies and practices that determine the life of the school.24

Fr. Pedro Arrupe, who was the Superior General of the Society of Jesus from 1965-1983, echoed the strong need for a contemporary identity document for Jesuit education which could respond to the new cultural challenges of the second half of the twentieth century. Many educators felt that the *Ratio* of 1599

no longer responded to modern times, in which schools face pluralism of views
and values. Vincent Duminuco describes the shifting context of the late seventies
in the following way:

Now [Jesuit educators] were experiencing the shift from a coherent
cultural and religious context to a pluralism of views and values, from a
respect for rational discourse to postmodern distance from reason and the
glorification of the individual and affective experience, from contentment with
a social structure that acknowledged and often accepted social class and
correlative privileges and deprivations to a demand for social justice for all,
from a faculty and staff that was overwhelmingly Jesuit in composition to one
characterized by ever-increasing percentages of lay men and women on staff.\textsuperscript{25}

Fr. Arrupe helped found the Jesuit educational apostolate anew. He
established the International Commission on the Apostolate of Jesuit Education
(ICAJE), which published the CJE in 1986.\textsuperscript{26} Fr. Arrupe’s guidelines made
schools, colleges, and universities understand that: 1) Jesuit educational
institutions are like missionary territories where the good news of the gospel is to
be announced; 2) the students are the goal and the center of the educational
endeavor because Jesuit schools want to educate people who are free and who live
up to the dignity of all human beings; 3) students are to be men and women for
others who are competent, conscientious, and compassionate; 4) the pursuit of
academic excellence remains a non-negotiable topic in the Jesuit educational
agenda; 5) the mission of Jesuit schools is the service of the faith that does justice,
stays in conversation with the culture and promotes inter-religious dialogue; 6) it
is imperative to invite all the constituents of Jesuit educational institutions to

\textsuperscript{25} Vincent J. Duminuco, S.J., “A New Ratio for a New Millenium?” in The Jesuit Ratio
Studiorum: 400\textsuperscript{th} Anniversary Perspectives, edited by Vincent J. Duminuco, S.J., 151.
\textsuperscript{26} In 1986, the Superior General of the Society of Jesus was the Reverend Father Peter-Hans
Kolvenbach.
become partners who share in the common mission of the schools; and 7) Jesuit education is value-centered, which means that schools never cease to ask themselves for the best ways to adapt and serve in the different contexts where they happen to be.27

Fr. Peter-Hans Kolvenbach, who was the Superior General of the Society of Jesus from 1983-2008, followed in the footsteps of Fr. Arrupe in his efforts to renew the Jesuit tradition in education for the challenging new context of the late twentieth century. He was an enthusiastic supporter of the whole educational enterprise, and, under his leadership, the Society of Jesus fostered 1) a value-centered education that has an explicit commitment to social justice; 2) education for societal dynamics which do not generate ever-growing gaps between rich and poor; 3) Jesuit and lay collaboration in Jesuit educational institutions; 4) dialogue between faith and reason; and 5) personal and communal education that is conducive to empowering people to live up to their ultimate vocation as beings who are created in the image and likeness of God. These were some of the major topics Fr. Kolvenbach addressed in his various allocutions on the theme of education.28

Therefore, in 1986, upon completion of the work of the International Commission on the Apostolate of Jesuit Education, it does not come as a surprise that Fr. Kolvenbach called for a wide distribution of the CJE. The document was indeed translated into thirteen different languages. Fr. Kolvenbach also wrote a letter that specified its nature. Particularly relevant to this chapter is what the

28 Cf. ibid., 79-95.
General of the Jesuit Order stated with respect to the inspirational aspect of the CJE and its ability to move all educators with the desire of serving the cause of Jesuit education:

A document listing the characteristics of Jesuit education is not a new *Ratio Studiorum*. However, like the *Ratio* produced at the end of the sixteenth century and as a continuation of the tradition begun then, it can give us a common vision and a common sense of purpose; it can be a standard against which we measure ourselves.

The *Characteristics* [...] can be the basis for renewed reflection on the experience of the educational apostolate and, in light of that reflection, for evaluation of school policies and practices; not only negatively (“What are we doing wrong?”), but especially positively (“How can we do better?”). This must take account of “continually changing” local circumstances: individual countries or regions should reflect on the meaning and implications of the characteristics for their own local situations, and should develop supplementary documents that apply this present universal document to their own concrete and specific needs.

Apostolic discernment “in common” is the work of the entire educational “community”. Jesuits contribute their knowledge and experience of Ignatian spirituality, while lay people contribute their own experience of family, social and political life. Our *common mission* will be the more effective to the extent that we can all continue to learn from one another.29

The CJE lists twenty-eight basic characteristics, which are divided into nine sections. Each one of those sections opens with a statement that is rooted in the Ignatian vision of the human person and the created world, which in turn can be traced back to the Principle and Foundation and other texts and aspects of the SE.30 The document also has a tenth section that brings some characteristics of Jesuit pedagogy, which will later become the document *The Ignatian Pedagogical Paradigm* (see 4.4 below).

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30 See Appendix 4.
Section 1: “Jesuit Education: • is world-affirming; • assists in the total formation of each individual within the human community; • includes a religious dimension that permeates the entire education; • is an apostolic instrument; and • promotes dialogue between faith and culture.”

Section 2: “Jesuit Education: • insists on individual care and concern for each person; • emphasizes activity on the part of the student; and • encourages life-long openness to growth.”

Section 3: “Jesuit Education: • is value-oriented; • encourages a realistic knowledge, love and acceptance of self; and • provides a realistic knowledge of the world in which we live.”

Section 4: “Jesuit Education: • proposes Christ as the model of human life; • provides adequate pastoral care; and • celebrates faith in personal and community prayer, worship and service.”

Section 5: “Jesuit Education: • is preparation for active life commitment; • serves the faith that does justice; • seeks to form ‘men and women for others’; and • manifests a particular concern for the poor.”

Section 6: “Jesuit Education: • is an apostolic instrument, in service of the church as it serves human society; and • prepares students for active participation in the church and the local community, for the service of others.”

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32 Ibid., [41] 137.
33 Ibid., [50] 139.
34 Ibid., [60] 140.
36 Ibid., [92] 144.
Section 7: “Jesuit Education: • pursues excellence in its work of formation; and • witnesses to excellence.”

Section 8: “Jesuit Education: • stresses lay-Jesuit collaboration; • relies on a spirit of community among: teaching staff and administrators, the Jesuit community; governing boards; parents; former students; benefactors; and • takes place within a structure that promotes community.”

Section 9: “Jesuit Education: • adapts means and methods in order to achieve its purposes most effectively; • is a ‘system’ of schools with a common vision and common goals; • assists in providing the professional training and ongoing formation that is needed, especially for teachers.”

Section 10: “Some Characteristics of Jesuit Pedagogy.” The document describes the relationship between the director of the SE and the retreatants in correlation with the relationship between teachers and students and points to examples of how Ignatius’s spiritual journey, the Constitutions of the Society of Jesus, the Ratio and the Ignatian world-view translate into Jesuit education for today.

The exposure to the characteristics of Jesuit education needs to be “contemplative” and inspirational. In the SE, Ignatius uses contemplation as a way to inspire, mold, inform, form, transform and give specific contours to the deepest desires which prompt the exercitants to conclude the first week of the...
retreat with the question about what they ought to do for Christ. Contemplation inspires insofar as it bonds the retreatants to Jesus Christ.

The use of the CJE by formation programs in Jesuit education leadership should make educators contemplate the possibilities that arise from the document with respect to the education of the actual students who come to Jesuit schools. In the SE, the exercitants contemplate the Lord and let what they see, hear and witness to resonate with and inform their deepest desires. In formation programs as referred to in this dissertation, the object of contemplation is the person to be educated and whose profile arises from the CJE. The goal of formation programs which aim to train educators to share in the common mission of Jesuit schools is to form committed partners who offer themselves to the diakonia of the students whom they contemplate as depicted by the CJE and encountered in the classroom. In other words, the king-and-knight and Jesus-and-his-disciples partnership through contemplation becomes the relationship between educators and those whom Jesuit educational institutions want to form. Therefore, educators are invited to go beyond what makes sense to them and with which they agree. They are inspired to be with and serve those they educate. The conclusion of the CJE reads indeed that the person to be educated is at the center of Jesuit education:

The aim of Jesuit education has never been simply the acquisition of a store of information and skills or preparation for a career, though these are important in themselves and useful to emerging Christian leaders. The ultimate aim of Jesuit secondary education\(^{41}\) is, rather, that full growth of the

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\(^{41}\) The Introductory Notes to the CJE read that: [12] “Though many of the characteristics on the following pages describe all Jesuit education, the specific focus is the basic education of the Jesuit high school, or colegio or college. (Depending on the country, this may be only secondary education, or it may include both primary and secondary levels.) Those in other Jesuit institutions, especially universities and university colleges, are urged to adapt these characteristics to their own situations.”
person which leads to action—action that is suffused with the spirit and presence of Jesus Christ, the Man for others.\textsuperscript{42}

Likewise, Fr. Kolvenbach has described the profile of the graduates of a Jesuit educational institution as persons who are “well-rounded, intellectually competent, open to growth, religious, loving and committed to doing justice in generous service to the people of God; men and women of competence, conscience and compassionate commitment.”\textsuperscript{43} These are the people whom educators can contemplate when exposed to the CJE. They are invited to commit to serving them through their educational endeavor and as partners of the common mission of Jesuit schools.

\textbf{4.5 – The Ignatian Pedagogy: A Practical Approach (1993)}

The worldwide reception of the CJE was overwhelmingly positive. At the same time, soon after the publication of the document, many educators felt that more practical directions were necessary to translate the principles of the CJE into the reality of daily interactions between educators and students. When, for example, the CJE touched upon the characteristics of Jesuit pedagogy, the document limited itself to establish the correlation between the SE and Jesuit education. There is only one short paragraph that describes what Ignatian pedagogy should look like. It reads: “The pedagogy is to include analysis, repetition, active reflection and synthesis; it should combine theoretical ideas with

their applications.44 These laconic lines, however, were the basis for the
document that the same International Commission on the Apostolate of Jesuit
Education released in 1993, namely, *Ignatian Pedagogy: A Practical Approach*
(IPPA, hereafter). The Introductory Notes to the IPPA read indeed that:

This document grows out of the tenth part of *The Characteristics of Jesuit
Education* in response to many requests for help in formulating a practical
pedagogy which is consistent with and effective in communicating the
Ignatian world-view and values presented in the *Characteristics* document.

It is obvious that a universal curriculum for Jesuit schools or colleges
similar to that proposed in the original *Ratio Studiorum* is impossible today.
However, it does seem important and consistent with Jesuit tradition to have a
systematically organized pedagogy whose substance and methods promote the
explicit vision of the contemporary Jesuit educational mission. . . .45

Therefore, the IPPA is the embodiment of the principles of Jesuit
education in a ready-to-use pedagogy for the classroom or any other educational
activity in a Jesuit school. Its five dynamics are: contextualization, experience,
reflection, action and evaluation. The IPPA can also be called a methodology but
only insofar as the understanding of this term goes beyond its sheer technical
connotations. In the Ignatian tradition though, it is better to use the term pedagogy
because it encompasses both the Ignatian world-view and the methodology that
has been synonymous with Jesuit education. Methods provide the way, but world-
views point to the direction to go.

Accordingly, discernment is a means that requires guidance so that one’s
desires shall meet the goal of being at the service of others. The profile of the
graduate of a Jesuit school sketched by Fr. Kolvenbach alludes to the ability to

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44 Ibid., [162] 152.
discern, and, as a matter of fact, discernment is the overarching operative principle of Jesuit education in general and of formation programs about the Jesuit tradition in education in particular. Discernment is the core of the Ignatian pedagogy in the SE.\textsuperscript{46} However, discernment needs a compass to help order one’s deepest desires toward diakonia to others.

In the SE, the movement from desire to diakonia is marked by the re-created exercitants who feel freed from the burden of their sins. As they become in touch with their deepest desires anew, they are enabled to ask the question about what they ought to do for Christ. Then, the retreatants are guided to the point that they are moved by the desire to serve whom they contemplate, namely, Jesus, who gives specific contours to their vocational discernment.

In the recent history of Jesuit education, the IPPA gives specific contours to a methodology which is embedded in the world-view of the previous CJE document. Vincent Duminuco offers a suitable explanation that unpacks the wisdom of the recent development in the theory and practice of Jesuit education:

Fortunately, in our time we are beginning to realize that education does not inevitably humanize people and society. We are losing faith in the naïve notion that all education, regardless of its quality or thrust or purpose, will lead to virtue. Increasingly, then, it becomes clear that we must insist that the process of education take place in a moral as well as an intellectual framework. This is not to suggest a program of indoctrination that suffocates the spirit; neither does it look for the introduction of theoretical courses that are speculative and remote from reality. \textit{What is needed is a framework of inquiry that encourages the process of wrestling with significant issues and}

\textsuperscript{46} By discernment is meant: 1) the process of weighing motions, affections, thoughts and inclinations, and careful analysis of their likely outcomes; and/or 2) the critical reflection of pros and cons before various possibilities of choice. At the conclusion of the process in the SE, the retreatants come to a particular vocational decision about what to do with their lives.
complex values of life, and professors capable and willing to guide that inquiry.\textsuperscript{47}

Moreover, right from the outset of the IPPA document itself it becomes clear that any worthwhile pedagogy needs to integrate world-view and methodology coherently:

Pedagogy is the way in which teachers accompany learners in their growth and development. Pedagogy, the art and science of teaching, cannot simply be reduced to methodology. It must include a world-view and a vision of the ideal human person to be educated. These provide the goal, the end towards which all aspects of an educational tradition are directed. They also provide criteria for choices of means to be used in the process of education. The world-view and ideal of Jesuit education for our time has been expressed in \textit{The Characteristics of Jesuit Education}. Ignatian Pedagogy assumes that world-view and moves one step beyond, suggesting more explicit ways in which Ignatian values can be incarnated in the teaching-learning process.\textsuperscript{48}

At a more practical level than the CJE, the IPPA offers a paradigm for the teacher-learner relationship that is derivative of the way the director of the SE guides the exercitants throughout the movements of the retreat. Chapter Two of this dissertation analyzed the educational philosophy as it arises from the Annotations of the SE. The role of the director of the SE is to facilitate the retreants’ encounter with God in prayer and the continuing reflection upon their experience of prayer in order to discern where God is leading them to take action and fulfill God’s will. Accordingly, the IPPA depicts the teaching-learning process as a continuing interplay of experience, reflection and action. The role of the educator is to mentor the students’ growth toward becoming a fully human person.

An Ignatian paradigm of experience, reflection and action suggests a host of ways in which teachers might accompany their students in order to facilitate learning and growth through encounters with truth and explorations of human meaning. . . .

A critically important note of the Ignatian paradigm is the introduction of reflection as an essential dynamic. For centuries, education was assumed to consist primarily of accumulated knowledge gained from lectures and demonstrations. Teaching followed a primitive model of communications in which information is transmitted and knowledge is transferred from teacher to learner. . . . 

Lastly, the core of the IPPA educational process is flanked by two other dynamics, namely, contextualization and evaluation, which are inspired by pedagogical insights as they arise from the SE. As a matter of fact, Ignatius goes to great length in the SE to establish where the retreatants are in their spiritual journey before determining the number and order of the exercises to be given to them (see 4.2 above). Moreover, Ignatius wants the exercitants to make an evaluation at the end of each period of formal prayer during the retreat.

The five dynamics of the IPPA overlap all the time. Just as any exercise during the retreat, contextualization, experience, reflection, action and evaluation constitute the warp and woof of the tapestry of the Ignatian educational process. During the retreat, the exercitants never lose sight of the context of the theme about which they meditate or of the mystery they contemplate. Contextualization in the IPPA is analogous to the composition of place in the SE.

During the first week of the retreat, Ignatius invites the retreatants to compose the place by considering some of the consequences of the embodiment of the abstract theme of the meditation. When the exercise is a contemplation, Ignatius invites the exercitants to imagine what the place where the scene takes

place looks like. Ignatius explains the *composition of place* at the beginning of the first week of the SE:

When a contemplation or meditation is about something that can be gazed on, for example, a contemplation of Christ our Lord, who is visible, the composition will be to see in imagination the physical place where that which I want to contemplate is taking place.

When a contemplation or meditation is about something abstract and invisible, as in the present case about the sins, the composition will be to see in imagination and to consider my soul as imprisoned in this corruptible body, and my whole compound self as an exile in the valley [of tears] among brute animals. I mean, my whole self as composed of soul and body.  

Likewise, the IPPA contends that the context of learning has to inform the pedagogical process. Therefore, attention to the integral reality of the person to be educated is given priority in the educational process. The IPPA reads that:

Since human experience, always the starting point in Ignatian pedagogy, never occurs in a vacuum, we must know as much as we can about the actual context within which teaching and learning take place. As teachers, therefore, we need to understand the world of the student, including the ways in which family, friends, peers, youth culture and mores as well as social pressures, school life, politics, economics, religion, media, art, music and other realities impact that world and affect the student for better or worse.

Lastly, as far as the IPPA dynamic of *evaluation* goes, the inspiration also comes from Ignatius’s pedagogical recommendations in the SE. The retreatants thus are invited to examine the time they spent in prayer with these words:

After finishing the exercise, for a quarter of an hour, either seated or walking about, I will examine how well I did in the contemplation or meditation. If poorly, I will seek the reasons; and if I find them, I will express sorrow in order to do better in the future. If I did well, I will thank God our Lord and use the same procedure next time.

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51 Ibid., [35] 247.
52 Ignatius of Loyola, *The Spiritual Exercises*, [77] 49.
In the IPPA, *evaluation* goes beyond the traditional role of academic tasks. Its broader meaning has to do with the process of ordering one’s self to better accomplish the goals of integral education of the entire person. In other words, *evaluation* does not exert only an archeological search for what has been assimilated by the students and remains with them. Looking teleologically into the life of the student, it fosters in the learners the habit and virtue of self-examination in order to achieve the end for which they are created. The IPPA document reads indeed that:

All teachers know that from time to time it is important to evaluate a student’s progress in academic achievement. […] Periodic testing alerts the teacher and the student both to intellectual growth and to lacunae where further work is necessary for mastery. This type of feedback can alert the teacher to possible needs for use of alternate methods of teaching; it offers special opportunities to individualize encouragement and advice for academic improvement (e.g. review of study habits) for each student.

Ignatian pedagogy, however, aims at formation which includes but goes beyond academic mastery. Here we are concerned about students’ well-rounded growth as persons for others. Thus periodic evaluation of the students’ growth in attitudes, priorities and actions consistent with being for others is essential. . . .53

Just as I did with the *Ratio* and the CJE, this brief overview of the IPPA is meaningful only as a response to the challenge of formation programs for partners in the common mission of Jesuit education. Educators of Jesuit schools need to be guided through a process which is analogous to the one that unfolds during the exercise of contemplation. The goal is to offer a compass for them to order their deepest vocational *desires* toward the *diakonia* to the Ignatian educational cause. Similarly to what happens with the retreatants’ spiritual movement during the SE,

those formation programs are to lead educators into a more affective knowledge of the Jesuit tradition in education. The exercitants contemplate the mysteries of the life, passion, death and resurrection of Jesus Christ, whereas the educators in training contemplate the person that Jesuit schools want to educate. The retreatants engage in the second week to become more faithful followers and disciples of Jesus in the world. Ignatian educators engage in a contemplative learning of the IPPA to become partners of a common mission of education, which is to prepare men and women for others, who in turn are capable of making responsible decisions for the advancement of the common good.

4.6 – Conclusion to Chapter Four

The use of the three core documents—Ratio Studiorum, Characteristics of Jesuit Education and Ignatian Pedagogy: A Practical Approach—of Jesuit education in formation programs for educators of Jesuit schools is inevitable. Moreover, it is necessary because it respects the Ignatian pedagogical insights as they arise from the SE. During the first week of the retreat, the exercitants are enabled to be in touch with their deepest desires and to ask about what they ought to do for Christ. In the second week, Ignatius makes the retreatants contemplate Jesus, whom they want to serve. One’s deepest desires then gain specific contours by being informed by Jesus’ life. Ignatius believes that contemplation offers a deeper level of understanding, which drives desire into diakonia more effectively than meditation does.
Likewise, when Jesuit educational institutions want to form educators to become partners in the common mission of Jesuit schools, they have to offer them the clear purpose of Ignatian education. That is the role of the documents which I have briefly surveyed in this chapter. However, the educators’ deepest desires will best turn into the desire to serve the students whom Jesuit education has in mind through contemplating the life project that those same documents impart. The goal is to achieve a level of commitment that goes beyond mere intellectual adherence to pedagogical methods or a view of education which is limited to cultural transmission. In the words of the IPPA, it is about the men and women for “the third millennium [who] will require new technological skills, no doubt; but more importantly, they will require skills to lovingly understand and critique all aspects of life in order to make decisions (personal, social, moral, professional, religious) that will impact all of our lives for the better.”

The use of a contemplative approach to present the documents that configure the Jesuit tradition in education has the ability to inspire educators and inform their desires into concrete service to the object of Ignatian education, namely, the person to be formed and the soul to be helped. As the other Jesuit apostolates, Jesuit education is to help souls.

However, yet another step is necessary, namely, to become partners of the common mission of Jesuit schools, educators in training need to find the specific ways in which they see themselves serving. This is the third movement of the SE. Ignatius calls it “Election”. I call it decision, that is, the fourth operative principle to form partners to share in the common mission of Jesuit schools.

54 Ibid., [80] 255.
Chapter 5 – Decision and the Process of Election in the Spiritual Exercises: Becoming Partners in Mission

The first movement of the SE centers on the exercitants’ identity. The second movement centers on Jesus Christ. In the dissertation, I call the operative principles of those first two movements *desire* and *diakonia*. Therefore, the SE help to shape retreatants’ Christian discipleship through leading them to ask what they desire to do for Jesus Christ. Then, the SE invite the exercitants to contemplate Jesus’ life and mission so that they become inspired by and moved with the desire to serve the Lord’s mission. Together, *desire* and *diakonia* work as the foundation for the retreatants’ vocational *discernment*—which is the undergirding operative principle of the entire experience of SE—toward *decision*.

*Decision* is the operative principle of the third movement of the SE. Ignatius calls it “election”, which is the result of the prayerful conversation between the exercitants’ own sense of mission (Chapter Three—first movement of the SE) and the mission of Jesus Christ, which was presented to them as an invitation for partnership (Chapter Four—second movement of the SE). The election recapitulates and synthesizes affectively and effectively the discerning process in which the contemplation of the mysteries of Jesus’ life resonated with and informed the retreatants’ deepest desires. In the third movement of the SE, the exercitants are invited to appropriate for themselves their adherence to the mission of Jesus Christ and to articulate how they feel called to collaborate with it more closely.
Formation programs to form partners in the common mission of Jesuit schools need to apply the operative principle of the third movement of the SE. Therefore, when Jesuit educational institutions form partners in mission, they aim at helping them arrive at a decision about how they see themselves actively engaged in that same mission.

5.1 – Preparing for the Election

Ignatius gives precise instructions for the fourth day of the second week of the SE, in which the retreatants: 1) pray about two opposing lifestyles, namely, the one of Christ and the other contrary to it (5.2.1 below); and 2) assess their own patterns of behavior when it comes to making decisions in life (5.2.2). Following his carefully organized sequence of contemplations of the mysteries of Jesus’ life, Ignatius unveils to the exercitants the “goal within the goal” of the retreat, namely, the choice of a state of life or the necessary amendment and reformation of one’s life and state.

As a matter of fact, during the first three days of the second week, Ignatius proposes the following contemplations: day 1) the Incarnation of the Word of God or the Annunciation to Mary (Lk 1:26-38) and the Nativity of Christ (Lk 2:1-14) for the first day; day 2) the Presentation in the Temple (Lk 2:22-38) and the Flight into exile in Egypt (Mt 2:13-18) for the second day; and day 3) Christ’s visit to the Temple with his parents at the age of twelve (Lk 2:41-50) and how Jesus was obedient to his parents while growing up in Nazareth (Lk 2:51-52) for the third day. In the morning, the exercitants contemplate both scenes indicated for each
day and use the same mysteries again in the afternoon. For those repetitions, Ignatius wants the retreatants to narrow the scope of their attention, focusing in on an affective assimilation and deep personalization of what happened during the morning prayers. Ignatius explains that, during a “repetition”, “I should notice and dwell on those points where I felt greater consolation or desolation, or had a greater spiritual experience [during the first time I contemplated any biblical scene].”

In order to prepare the retreatants for the election, Ignatius writes a consideration of the states of life in which he also gives the rationale for the choice of the mysteries to be contemplated during the first three days of the second week of the SE, especially the third day. Moreover, Ignatius lets the exercitants know that, from the fourth day of the second week onward, their main discernment will require them to contemplate the scenes of the public life of Jesus, keeping in mind the choice of the life project that is more conducive to the fulfillment of their calling. Ignatius’s “Introduction to the Consideration of the States of Life” reads as follows:

We have already considered the example which Christ our Lord gave us for the first state of life, which consists in the observance of the commandments. He [Jesus] gave this example when he lived in obedience to his parents.

We have also considered the example he gave us for the second state, that of evangelical perfection, when he remained in the temple, separating himself from his adoptive father and human mother in order to devote himself solely to the service of his eternal Father.

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While continuing our contemplation of his life, we now begin simultaneously to explore and inquire: In which state or way of life does the Divine Majesty wish us to serve him? . . .

During the retreat, Ignatius’s understanding of “election” refers to decisions that must be made concerning one’s state of life. George Ganss explains that the states of life can be spoken about in many different ways. In the quote above, Ignatius presents only two, namely, life in the world and religious life, or the observance of the commandments as a lay person and the profession of the religious vows of poverty, chastity and obedience. Ganss goes on to say that such an understanding of the two principal vocations is an interpretation of the division that Jesus himself suggested to the wealthy young man (Mk 1:17-27) who asked the Lord what he ought to do to inherit eternal life. Moreover, the twofold vocational chart was common until the present time and was practical for the ideal retreatant whom Ignatius’s text envisaged. But in modern times many have found those two categories unsatisfactory, and a gradually growing opinion found expression in Vatican Council II: “All Christians in any state or walk of life are called to the fullness of Christian life and to the perfection of love” (On the Church, no. 40). This more comprehensive teaching updates Ignatius’s views but does not conflict with them.

In stating that all Christians are called to holiness, Vatican II has reshaped the understanding of Christian spirituality as well. The call to holiness comes

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1 Ibid., [135] 64.
2 Vowed religious life is often called the state of life of evangelical perfection.
3 Ganss refers to the Vatican II Dogmatic Constitution on the Church – Lumen Gentium, which was promulgated in November, 1964.
4 George Ganss, The Spiritual Exercises, 166. Today, one practical list for exercitants in search for a state of life within the Catholic church should include the states of: 1) marriage, 2) single life, 3) diocesan priesthood, and 4) consecrated life as a sister, a brother, a priest or a member of an ecclesial movement. But, many times, a more specific sense of calling and vocation, such as to embrace certain ministries within the Church or to have a ministerial approach to one’s profession, occupies the core of people’s vocational discernment to the point of shaping their overarching state of life.
primarily from baptism, which applies to all Christians, and not merely from holy orders or religious vows, as could be inferred from theological developments which equated consecrated life to already fulfilled evangelical perfection. All states of life, therefore, are entitled to develop their own spirituality. In this context, spirituality means a specific vocation or systematically articulated vision of the Christian faith that highlights certain aspects of the Christian message, entails certain devotional practices (love of God) and calls for a specific lifestyle, especially with respect to service of others (love of neighbor). Most models of holiness prior to Vatican II were developed by celibate clergy and vowed religious, but these must be widened in the post-Vatican II era to include the experience of married and single women and men.

Ignatius knows, however, that there are exercitants who have already embraced a non-changeable state of life—he gives two examples, namely, an ecclesiastical office and the state of matrimony. Their task thus is not to arrive at an election, but rather to consider how they can improve and reform their lifestyle “by setting before them the purpose of each one’s creation, life and state of life: the glory and praise of God our Lord and the salvation of their own soul.”6 Therefore, the retreatants are invited to re-order their lives by taking into account the double movement that allows them to re-discover their vocation, namely, being in touch anew with their deepest desires in the first week of the SE and being inspired by the contemplation of the life and mission of Jesus during the second week of the retreat.

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When the election of a state of life is not at stake, Ignatius gives detailed examples for those who are established in an ecclesiastical office or are married. Ignatius shows how pragmatic is his understanding of spiritual life. For the author of the SE, the affections and motions experienced in prayer are the means used by God to show people the direction to take in the ordering of their daily lives. By choosing such direction, they embrace what is more conducive to the end for which they are created. Therefore, Ignatius states that:

To make progress toward this end and attain to it, one ought to consider and work out in detail [...] how large a house and how many persons in it one ought to maintain, how one ought to direct and govern its members, and how to teach them by word and example. So too persons such as these should examine their resources, how much they ought to assign for the house and household, and how much for the poor and other good works. In all this and by it, each one should desire and seek nothing except the greater praise and glory of God our Lord.7

Using terms that have become familiar to the exercitants during the retreat, Ignatius reminds them of the opening statement of the Principle and Foundation, namely, that “human beings are created to praise, reverence and serve God our Lord, and by means of doing this to save their souls.”8 As a matter of fact, the reform of life and the election, when it applies, refer to people’s cooperation in God’s continuous work of creation in them. The ordering of one’s life allows one to choose that which is more conducive to the end for which one is created. Therefore, the retreatants need to consider the internal movements that the SE have kindled in them, discerning and coming to a decision about how their deepest desires meet the will to serve the mission of Jesus Christ as his partners

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7 Ibid., [189] 80.
8 Ibid., [23] 32.
and co-agents in the world. Some exercitants will make a decision and choose a permanent state of life, whereas others will re-order their existing state of life so that they will attain more freely the full measure of their vocation and existence.

5.2 – Meditations of the Second Week

On the fourth day of the second week of the SE, the retreatants are presented with the following exercises: 1) “A Meditation on Two Standards, the One of Christ, Our Supreme Commander and Lord, the Other of Lucifer, the Mortal Enemy of Our Human Nature;”9 and 2) “A Meditation is made on the Three Classes of Persons, to aid toward embracing what is better.”10

5.2.1 – The Two Standards

The Two Standards meditation aims at observing how different the intention of Jesus is from that of “the enemy of human nature,” Ignatius’s expression of choice to refer to the devil. This exercise is about intentional tactics and strategies in life. The exercitants are invited to think how they ought to dispose themselves “in order to come to perfection in whatever state or way of life God our Lord may grant [them] to elect.”11

There are many similarities between the Two Standards and the meditation of the Kingdom. The latter is the exercise that marks the transition from the first to the second movement of the SE, namely, from the experience of being re-created by God through love and forgiveness of sins during the first week to the

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9 Ibid., [136] 65.
10 Ibid., [149] 68.
11 Ibid., [135] 64.
inspirational contemplation of the life of Jesus in the second and subsequent weeks of the retreat. At the end of the first movement of the SE, the retreatants are enabled to re-connect with their deepest desires and ask what they ought to do for Christ? The remainder of the retreat informs the exercitants’ will toward the offering of their entire beings in service to the mission of Jesus. However, the moment of election that is mediated by the Two Standards meditation turns desires and will to serve into the personal decision that intentionally chooses one life project over another, namely, Christ’s “strategic plan” over Lucifer’s.

As he did with the exercise of the Kingdom, Ignatius divides the Two Standards meditation into two parts: the consideration of the standard of Satan and the one of Christ. The retreatants have to reflect on the values with which each leader summons his followers:

Consider the address [Satan] makes to [his devils]: How he admonishes them to set up snares and chains; how first they should tempt people to covet riches (as he usually does, at least in most cases), so that they may more easily come to vain honor from the world, and finally to surging pride. In this way, the first step is riches, the second is honor, and the third is pride, and from these three steps the enemy entices them to all the other voices.

Consider the address which Christ our Lord makes to all his servants and friends whom he is sending on this expedition. He recommends that they endeavor to aid all persons, by attaching them, first, to the most perfect spiritual poverty and also, if the Divine Majesty should be served and should wish to choose them for it, even to no less a degree of actual poverty; and second, by attracting them to a desire of reproaches and contempt, since from these results humility.12

Unlike the meditation of the Kingdom, however, the Two Standards does not lead the retreatants from a good project to a better one. The temporal king of the parable is a good man who has noble intentions which resonate with the

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12 Ibid., [142,146] 66.
exercitants’ deepest desires. Moreover, the king offers partnership in a worth-pursuing mission that shall be accomplished by all and promises to his subjects that they will have a share in the benefits of their common victory. But in the Two Standards Ignatius clearly condemns the strategy of the enemy of human nature. In other words, riches, honor and pride are not conducive to the end for which people are created because they are the opposite of the tactics of Christ’s banner, namely, spiritual poverty for all and actual poverty for some, reproaches and humility. Satan does not have a mission that is worth choosing, and his victory means eternal damnation for his followers.

As stated above, Ignatius has in mind only two major states of life, that is, the one “in the world” through matrimony or ecclesiastical functions on the one hand, and vowed religious life, which entails not owing any material goods, on the other. The former does not necessarily mean that married people in the professions and functionaries of the Church who make money follow the values of Satan. But Ignatius does understand that actual poverty is an expression of interior detachment from worldly possessions and embodies the ability to leave things for the sake of heavenly riches, according to Jesus’ invitation to the wealthy young man who wanted to excel in his pursuit of eternal salvation.\(^\text{13}\) For Ignatius, poverty is one’s total emptiness and dependence before God for all spiritual progress. When the retreatants do not feel that they are elected by God to choose vowed consecrated life and “withdraw from the world”, their task is to order their material wealth according to the values of the banner of Christ, which are poverty, contempt by the world and humility. Then, they can achieve the

\(^{13}\) Cf. Mk 10:17-22.
humble attitude of those who fill their selves with God and God’s gifts. Karl Rahner broadens the meaning of the critical choice that is at stake during the Two Standards meditation as follows:

[W]e must be aware of the fact that the attitudes desired by Christ and the attitudes desired by Lucifer can be mistaken for one another. Greed can hide under the disguise of poverty, and the seeking of insults and contempt can be a refined form of seeking recognition from others. One can be very proud in a shabby suit! These false forms are worlds apart from the poverty and humility Ignatius describes as the characteristics of the standard of Christ. These characteristics are only present when they are subject to the cross of Christ, when they are submerged in the daily fulfillment of duty, when they bring one in contact with the community in order to help others and to be ready to leave all judgment to Him.14

In sum, central to the Two Standards is the confrontation between two sets of values which oppose each other, and the implications for the retreatants of such an opposition. As the exercitants prepare to take upon themselves the task of a personal decision vis-à-vis the new orientation that they will give to their lives, Ignatius gives them the responsibility to choose between light and darkness, holiness and damnation, and life and death. For Ignatius, each person must deal with an existential crossroads in their lives. Gilles Cusson cites a letter written by Ignatius in 1536 in which the author of the SE emphasizes the importance of personal decision related to the Two Standards:

Just as it is not the good works of the good angels that will save me, it is not the bad thoughts and the weakness insinuated by the bad angels, the world and the flesh that will damn me. It is my soul and only my soul that God our Lord wants to see in conformity with God’s divine Majesty. Moreover, it is such a subjected soul that drives the body, one way or another, according to

the divine will. This is the place where our great struggle meets God’s
dwelling, and we find sovereign and eternal goodness.  

5.2.2 – The Three Classes of Persons

On this same fourth day, a meditation is made on the three classes of
persons, to aid one toward embracing what is better. . . .

[It is the story] of three persons, each typical of a class. Each of them has
acquired ten thousand ducats, but not purely or properly for the love of God.
Each desires to save his or her soul and to find God our Lord in peace, by
discarding the burden and obstacle to this purpose, which this attachment to
the acquired money is found to be.  

The third movement of the SE centers on neither the retreatants’ desires
nor on the life of Jesus. The election to be achieved comes out of the relationship
between the exercitants and God and, as a process, remains at the level of the on-
going conversation between creature and Creator. The retreatants do not look at
themselves outside of that relationship. Nor do they contemplate Jesus’ life for its
own sake. Therefore, Ignatius brings the exercitants back to self-examination after
they have reflected upon the Two Standards. The retreatants will certainly see
themselves in at least one of the three classes of persons depicted in this exercise.

Ignatius goes on to explain that persons typical of the first class never take
any action in order to accomplish what they want, which is to get rid of the
attachment to the acquired money. Representatives of the second class, however,
have already made up their minds. Although they are determined not to remain
attached to the money, they tie God’s grace to the pre-condition of keeping the
money. In other words, they ask for God’s grace of detachment, but they are not

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15 Ignatius of Loyola, cited by Gilles Cusson, S.J., Pédagogie de l’expérience spirituelle
personnelle, 307 (my translation).
16 Ignatius of Loyola, The Spiritual Exercises, [149-150] 68.
open to consider the alternative of not keeping the money. Lastly, those who are in the third class of persons exemplify Ignatius’s understanding of indifference as in the text of the *Principle and Foundation* (see Chapter Three Above—3.1). Therefore, they desire to get rid of the attachment with no previous conditions. “There remains no inclination either to keep the acquired money or to dispose of it.”17

Ignatius is indifferent as well vis-à-vis the exercitants, insofar as he understands that not everybody is called by God to actual poverty and vowed religious life. However, at this point of the retreat, Ignatius wants the retreatants to realize that a *decision* needs to be made, lest they are guided by *desires* that are not motivated solely by the *diakonia* to God’s divine will for them.

George Ganss and other commentators of the SE concur that the Three Classes offers a counterpoint to the Two Standards. The latter is about tactics and strategies that are placed outside of the exercitants, even though the point of the meditation is to invite them to choose and embrace for themselves the values of the banner of Christ. The Three Classes, however, confronts the retreatants with their own in-depth intentions and encourages them to move decidedly toward a more affective adhesion to Christ. For Ganss, indeed, this meditation is about three persons, each of whom is typical of a class or group of others who think and act in a similar manner, namely: 1) the postponers, 2) the compromisers, and the 3) the wholeheartedly indifferent, those open to whatever option will after deliberation turn out to be the better.

17 Ibid., [155] 69.
The aim of the meditation is […] to prepare one’s dispositions for the coming deliberations on the election, by confirming and perfecting the indifference acquired in the [Principle and] Foundation.\textsuperscript{18}

Ignatius knows that there are different paths in life to follow Jesus. However, as he did with the Two Standards, he uses the Three Classes to emphasize that the exercitants have already come a long way into the relationship with Jesus. Therefore, this very same relationship becomes the centre of their considerations during the remainder of the retreat and beyond. It is about conversion. The theological and anthropological tenets of conversion point to what constitutes truly moral acts, namely, that they require a personal and conscious \textit{decision} which cannot be neutral. Nor are they a mere reflex reaction to an embedded religious tradition. Real conversion demands, in the words of Rosemary Haughton, a response rooted in love to “an outbreak into consciousness of a new mental construction.” She goes on to say that:

The transformation [or conversion] occurs in the moment of self-surrender to love. Each is responding to an invitation that comes to him or her through the other, and could not do so otherwise. The response of each is a total gift of the whole person as it then exists, it is unconditional and unreflective. It is of their own deeper self, yet it is not possessed but only exists in its givenness. This is \textit{faith}, which is personal, yet cannot arise from the person without some intervention.\textsuperscript{19}

In sum, Ignatius calls for a conversion experience, which entails personal responsibility vis-à-vis the relationship that the exercitants have entertained with Jesus throughout the first two movements of the SE. It is time to take sides and choose between the contrasting values, strategies and plans of the two standards. It is also time to take responsibility for the life-altering experience of giving

\textsuperscript{18} George E. Ganss, S.J., \textit{The Spiritual Exercises}, 169.
\textsuperscript{19} Rosemary Haughton, \textit{The Transformation of Man}, 80.
oneself without reservation to the relationship with Christ as the person typical of
the third class.

5.2.3 – Three Ways of Being Humble

Before bringing the second week of the retreat to a closure through the
making of the election, Ignatius has one final consideration to suggest to the
exercitants. It is his *Three Ways of Being Humble*. It is not presented as a formal
prayer exercise and it is neither a meditation nor a contemplation. Ignatius reflects
about three degrees of humility. The first, he teaches, is necessary for one’s
eternal salvation and consists in not compromising obedience to God’s
commandments for personal gain in this life. In other words, it is straightforward
compliance with the authority of the Word of God.

The second degree of humility is more perfect than the first insofar as it
refers to the concept of “indifference” that Ignatius puts forward in his *Principle
and Foundation*. Therefore, it is no longer a matter of deciding whether or not to
obey the commandments. Instead, “if my options are equally effective for the
service of God our Lord and the salvation of my soul, I do not desire or feel
myself strongly attached to having wealth rather than poverty, or honor rather
than dishonor, or a long life rather than a short one.”

Lastly, the third degree of humility points to a more literal imitation of
Christ and is motivated by a very personal loving relationship between the
retraitants and God. Therefore, the election will make the exercitants partake in
hardships similar to the ones endured by Jesus himself during his ministry on

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earth. Ignatius lists as examples of such imitation actual poverty, contempt and being regarded as imprudent and reproachable by worldly standards.\(^{21}\)

George Ganss explains that Ignatius’s intention with this consideration is “to bring the exercitant to great openness to God and to a loving desire to be as like to Christ as possible.”\(^{22}\) Following the same general guiding principle that should preside at the election, any choice made by the retreatants needs to point to a higher good and to be true to the relationship between the exercitants and Jesus that is growing and being perfected throughout the SE.

### 5.3 – The Election

After the two meditations on the fourth day of the second week of the retreat—the Two Standards and the Three Classes of Persons—Ignatius guides the retreatants through contemplative exercises of Jesus’ public life from his baptism in the river Jordan until Palm Sunday in Jerusalem. During a period of more or less seven days, the exercitants contemplate Jesus calling and instructing his disciples, and preaching and ministering to the crowds. At the same time, Ignatius makes the director of the SE explain to the retreatants the material

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\(^{21}\) The theme of literal imitation of the life of Jesus is ubiquitous among spiritual authors and is often associated with those who attain superior freedom in the Holy Spirit. For example, Meister Eckhart, O.P. (c. 1260-c. 1328), the German theologian, philosopher and mystic friar of the Dominican Order, wrote that: “A life of rest and peace in God is good; a life of pain in patience is better; but to have peace in a life of pain is best of all.” However, suffering is never an end in itself. St. John of the Cross, O.Carm. (1542-1591) discussed extensively what is called the dark night of the soul. For him, “even though this happy night darkens the spirit, […] it does so only that the person may reach out divinely to the enjoyment of all earthly and heavenly things, with a general freedom of spirit in them all.” If pain, poverty, humiliations and suffering are self-inflicted and chosen for their own sake, they are not means to progress toward God. Cf. Ursula Fleming, “John and Pain,” in *A Fresh Approach to St. John of the Cross*, edited by John McGowan (Kildare, Ireland: St. Paulus, 1993), 134.

pertaining to an election, including the consideration about the three degrees of humility.

In his “Introduction to the Making of the Election”, Ignatius reinforces the doctrine of ordered intention:

In every good election, insofar as it depends on us, the eye of our intention ought to be single. I ought to focus only on the purpose for which I am created, to praise God our Lord and to save my soul. Accordingly, anything whatsoever that I elect ought to be chosen as an aid toward that end.

I ought not to order or drag the end into subjection to the means, but to order the means to the end. In this way it happens, for example, that many choose firstly to marry, which is the means, and secondly to serve God our Lord in marriage, although the service of God is the end. . . .

Ignatius expects the election to take place around the twelfth day of the second week of the retreat. Exercitants base their free decision upon the relationship they have established with Jesus. As a matter of fact, the SE put forward the broader notion that human decision-making processes take place most excellently within interpersonal relationships. Although decisions are personal, in the end, they are made in the setting of formative communities where people interact with one another in a meaningful way. Freedom to decide happens within a community of love.

Therefore, in the SE, election is based on the relationship between the retreatants and Jesus Christ within the community of the Church. That decision in turn affects the exercitants’ lives, their relationship with others and entails both personal and communal transformation insofar as it concerns the betterment of self and of the world. Paraphrasing Frederick Bueckner, election is where

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people’s deepest desires meet God’s plan for them with respect to the world’s deepest needs.25 Such a decision comes out of the relationship between the retreatants and Jesus Christ and is mediated by the community of love which is the Church. More specifically, the Church offers the grounds for formative relationships, which create the grounds for vocational discernment.

The process of choosing a path in life responds to one of the overall formation goals of communities of belonging and meaning such as nuclear families, religious initiatives, schools or cultural and ethnic groups at large. Communities form their members through making them interact with one another according to shared customs, traditions and skills, but also through common language, knowledge, goals and inherited wisdom. By doing so, communities create the interpersonal encounters that allow for personal and communal transformation through decision-making processes. They also promote human growth when they educate their members to accept otherness without feeling threatened by it.

Conversely, communities can prevent transformation if they do not offer opportunities for personal growth. Unlike Ignatius’s idea of election in the SE, such communities do not encourage their members to weigh their deepest desires vis-à-vis their participation in broader inspirational projects. Instead, they focus on setting their members straight and making them behave according to a rigid set of regulations.

Ignatius believes that the Church is not an accidental community, but rather an on-purpose and formative one in which the goal is to know, love and serve God and neighbor. At the same time, Ignatius conveys to the retreatants the idea that their belonging to the Church ought to be as agent-subjects of her mission. The Church is the formative community that intentionally promotes relationships among people, and between people and God, leading to decisions which are conducive to personal and communal transformation. This is why Ignatius stresses that “all the matters about which we wish to make an election should in themselves be either indifferent or good, so that they function constructively within our Holy Mother the hierarchical Church, and are not bad or opposed to her.”

During the SE, election occurs amidst an intense covenantal relationship between the exercitants and Jesus, based upon freedom, trust and love, and within the Church community at large. Ignatius explains to the retreatants that election happens sometimes when God attracts people’s will in such a way that they cannot doubt about their calling. “This is what St. Paul and St. Matthew did when they followed Christ our Lord.” In other cases, the exercitants will come to clarity about what to choose by reflecting on the various spiritual movements they experience in prayer. In other words, retreatants have to discern between consolations and desolations to find what is more conducive to the end for which they are created. Lastly, exercitants can elect a state of life or re-order their

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27 Ibid., [175] 76.
current one by weighing pros and cons of the different options that lie before them. Ignatius instructs that they

“should consider and reason out how many advantages or benefits accrue to myself from having the [ecclesiastical] office or benefice proposed, […] and the disadvantages and dangers in having it. . . .

After I have thus considered and reasoned all the aspects of the proposed matter, I should see to which side reason more inclines. It is in this way, namely, according to the greater motion arising from reason […] that I ought to come to my decision about the matter proposed.28

5.4 – True Self and Shared Commitment

As in previous chapters, the second part of Chapter Five also puts the SE in conversation with research in the fields of education, social sciences and leadership. Ignatius fosters personal decision through the process of election during the retreat. Election means authenticity vis-à-vis one’s true self and deepest desires in connection with the will to be at the service (diakonia) of Jesus’ mission. But election also means shared commitment to the common mission of evangelization.

Jesuit schools need to lead educators to decide how they see themselves taking responsibility for the mission of Jesuit education. The idea of a common mission that belongs to all is the most sustainable way to guarantee creative fidelity to any original charism, especially when this inspirational ideal is confronted with change throughout the lifecycle of the organization it animates. Schools’ vicissitudes are not different from what happens in any other

28 Ibid., [181-182] 77-78.
organization. Educational institutions also face ever-changing challenges along their history. Andy Hargreaves and Dean Fink, for example, contend that schools need to stretch and spread leadership if they want to successfully remain creatively faithful to their original tradition. As a matter of fact, they regret the fact that educational leadership literature has often overemphasized the role of the principal to the detriment of the necessity of distributed leadership. Their conclusion is that the “pre-occupation with the leadership of principals has reinforced the [wrong] assumption that school leadership is synonymous with the principal.”

In order to attain the goal of fidelity to the Jesuit mission in education, schools have to design formation programs that embed the operative principle of decision in a way that is analogous to the process of election in the SE. As explained above, during the retreat, Ignatius does not impose over the exercitants any specific state of life or have pre-conceived ideas about how the retreatants are to order their lives. Also, the Church is the community of meaning within which the exercitants are free to choose their own paths. Educators in Jesuit schools can count upon the major documents analyzed in Chapter Four—*Ratio Studiorum*, *Characteristics of Jesuit Education* and *Ignatian Pedagogy*—besides a variety of allocutions of Superiors General of the Society of Jesus and decrees of its recent General Congregations as their inspirational frame of reference in Jesuit education. Educators are invited to be inspired by the tradition and come to a personal decision about their role in Jesuit education. Such an “election” echoes Peter Senge’s understanding of inspirational vision, which often emanates from

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29 Andy Hargreaves and Dean Fink, *Sustainable Leadership*, 96.
the top but also comes from those who are not in a position of authority. In his own words: “The origin of the vision is much less important than the process whereby it comes to be shared. It is not a ‘shared vision’ until it connects with the personal visions of people throughout the organization.”

Senge’s insight coincides with some of the results of Samuel Eisenstadt’s investigation on the concept of freedom and personal charisma. Personal freedom does not lie outside of the scope of society. Accordingly, “interpersonal relations, organizations, institutional structures and the macrosocietal setting constitute the arena in which freedom, creativity and responsibility could become manifest.”

Eisenstadt goes on to say that there is no contradiction between personal charisma and institutional commitment. On the contrary, there is crosspollination between individuals and society to the point that the latter’s political, economic, legal, religious and stratification spheres are not only organizational aspects of any relatively stable social relations or institutions; they do not only constitute means for the attainment of goals which are, as it were, outside of them. They constitute also realms of goals, of “ends”, of potentially broader, overall “meanings” toward which the activities of the participants are oriented.

Actually, what election in the SE and the processes described above by Hargreaves, Senge and Eisenstadt highlight is that there exists a phenomenon of crystallization of broader symbolic orientations, norms and purposes through free allegiance on the part of the members of communities of meaning. In general terms, leadership is defined as the ability to articulate various goals, to establish

32 Ibid., xxxvii.
organizational frameworks and to mobilize the resources necessary for all those purposes in conjunction with the critical component of mobilizing the inner charismas of all involved in the process of institution building. In education in particular, Hargreaves and Fink emphasize that leadership needs to make overarching goals function in tandem with mobilization of personal desires. That is how schools exert sustainable leadership because they reflect sustainable learning. In their words:

> The central sustainable purpose of education is deep and broad learning, which is everyone’s entitlement. Deep learning is often also slow learning—critical, penetrative, thoughtful and ruminative. It is learning that engages people’s feelings and connects with their lives. […] Sustainable educational leadership puts [this sort of] learning first.33

The best way to successfully secure creative fidelity to the identity and mission of any organization throughout its lifecycle is to engage people’s personal talents into the ever-renewing core characteristics of the organization. Schools, surely of all organizations, need to look at their educators as learning persons within learning communities, whose life together can thrive only though ever-deeper learning. Eisenstadt explains that transformation of social systems happens best through fostering a new type of relationship between personal charismas and collective identities. In the field of educational change, Hargreaves and Fink also conclude that people need to have a passion and purpose that is theirs, which is, however, sharpened by the tradition and common goals of their larger learning community of meaning. Senge, likewise, states that the best way for a vision to spread is through a “reinforcing process of increasing clarity,

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33 Andy Hargreaves and Dean Fink, Sustainable Leadership, 53-54.
enthusiasm, communication and commitment. As peoples talk, the vision grows clearer. As it gets clearer, enthusiasm for its benefits builds."34

In the SE, Ignatius offers his own version of the necessary covenant between personal truth and shared commitment to a common mission in the process of election that takes place at the end of the second week of the retreat. The common denominator of the insights studied so far in this chapter acknowledges that people’s predisposition to follow their own desires is not dissociated from the traditions they encounter in larger communities of meaning. My own input to this common denominator is that I deem it necessary to embed the operative principle of decision, which is derivative of the process of election in the SE, in formation programs designed to form partners in the common mission of Jesuit education. In doing this, I contend that educators of Jesuit schools are invited to come to a discerned decision about how their personal desires meet the inspirational call to diakonia/service to the common mission of Jesuit education. More specifically, I argue that formation programs designed by Jesuit school to form partners in the common mission of Jesuit education need to lead their trainees into a personal decision that is analogous to the process of election in the SE.

5.5 – Four Models of Leadership or Waves of Change

By looking at the SE as a source of operative principles for formation programs for educators in Jesuit schools, I place my research at the intersection of theology and education, ministerial formation and educational leadership, pastoral ministry and educational change. Scholars who work on the subject of how to change schools state that the successive waves of reform in recent decades have often mirrored change procedures used in the business world. The models for school leadership are also imported into educational domain from the field of social sciences. Each wave of reform is presented to school communities as the best way to promote change and to achieve academic, administrative, community lifestyle or any other type of renewal. When uncritically embraced, each model of leadership relies on the assumption that there exists a direct correlation between actions and reactions in change initiatives. However, any leadership models or change procedures need to adapt to the peculiarities inherent in individual schools, which is often called “school culture”. Michael Fullan points to the fact that most strategies for reform focus on “structures, formal requirements and event-based activities involving, for example, professional, development sessions. They do not struggle directly with existing [school] cultures and which new values and practices may be required.”

35 Michael Fullan, *The New Meaning of Educational Change* (New York: Teachers College Press, 2001), 34. Also, cf. p. 221 on the role of government-sponsored initiatives, which suffer from fragmentation, that is, vertical and horizontal disconnection among various federal, state and local agencies, resulting in multiple programs that collide with one another and in poor levels of policy implementation. Once again, Fullan argues that it is easier to adopt new vouchers and charters, push structural changes and enforce accountability than “to engage in the hard work of cultural changes in relationships, capacity and motivation.”
Independent fields of research come to similar conclusions as they identify four main models of leadership whose impacts can be traced in different areas of human activity. Terms such as “model” or “wave” thus are used to characterize different procedures and their effects on organizations in particular and on society in general with respect to leadership, change or reform efforts. I summarize below how the main features of each one of those four models operate in two different examples. The first one deals with the history of the concept of corporate responsibility (5.5.1), and the second refers to the field of educational change (5.5.2).

5.5.1 – Corporate Responsibility and the Business World

Generally speaking, sociologists like Charles Derber see primacy of top-down initiatives as the main characteristic of the first wave of change or leadership model. In the evolution of the concept of corporate responsibility in the United States in particular, they associate this period with the gilded age of robber baron capitalism at the end of the nineteenth century, which was the first era of corporate power in America. Philanthropy was seen essentially as government responsibility, and top-down initiatives translated into government-sponsored decision-making processes. Scholars also identify the same model in the three decades after World War II, during which there was extensive state investment in welfare, medicine, transport and energy resources, housing, municipal services, pensions and education.
In contrast, the second wave is characterized by a bottom-up approach. This is the prevailing leadership model of the second wave of corporate power, especially in the second decade of the twentieth century in the United States. In spite of the strong paternalism in the way corporations operated, bottom-up philanthropic initiatives from outside of the government sector counterbalanced the excesses fostered by the social state of the first wave. There was indeed full or partial privatization of social services along with market competition for and among clients and providers of them.

The third wave fosters an empowerment strategy and a collaborative approach to leadership within the organization. Therefore, corporations offer a share in power to their workers and consumers, allowing for more balance between top-down and bottom-up initiatives. As far as the evolution of the concept of corporate responsibility goes in the United States, the third wave of change can be traced back to the nineteen-sixties. It promised a more creative combination of public, private and voluntary solutions in order to further economic prosperity. The third wave of corporate responsibility seeks to create a stakeholder mentality among employees and clients, empowering both and producing, on the one hand, more committed and productive workers, and more loyal customers on the other. However, it is also noted that the same paternalistic tendency of the first two models still finds its way into the third wave of corporate responsibility. When this happens, empowerment strategies and corporate social commitments are often managed as add-on programs and never get to the warp and woof of the tapestry of many corporations.
Lastly, the fourth wave of change, building on past strategies, looks for an inspirational and sustainable model that empowers anew both internal and external partners to create large-scale stakeholder, corporate and societal change. The fourth wave aims at strengthening the third model’s sustainability. In the field of corporate responsibility, the three major strategies of the fourth model appear as follows: 1) the flux of inspiration becomes multi-directional because more stakeholders are invited to be “at the table” and to contribute with ideas for grants and other programs (multiple internal sponsors and external partners and links); 2) sustainability is also improved because future projects become an integral part of the corporation’s extended bottom-line; and 3) social-initiatives planning engages the three levels of critical thinking, namely, practices, processes and premises.36

Some examples of third-wave change initiatives in the history of corporate responsibility are: 1) creation of day-care centers for employees within the premises of the organization, 2) projects to pay employees to tutor inner-city kids on company time, or 3) openness that allows employees to make one-person-one-vote decisions on charitable donations by their firms. Fourth-wave examples are: 1) two-way collaboration with city, schools and grass roots community groups; 2) empowerment of community groups to write their own grant proposals; or 3)

36 Cf. Chapter Two, footnote twenty, on third-order learning. Steve Waddell, who is the founder of the Leadership for Change program of the Winston Center of Leadership and Ethics at the Boston College Carroll School of Management, puts it this way: “The other change dimension is one of depth. […] First-order change involves change within the current rules of the game. […] With second-order change, the basic decision-making framework remains the same although its structure changes. […] Societal Learning and Change always involves third-order change, in which the basic structure and decision-making framework are changed.” Steve Waddell, Societal Learning and Change: How Governments, Business and Civil Society Are Creating Solutions to Complex Multi-Stakeholder Problems (Sheffield, UK: Greenleaf Publishing, 2005), 16.
assessment of corporate mission linked to community development as in fair-trade initiatives.  

In sum, the first model of leadership is top-down. The second is bottom-up. Third and fourth waves of change foster collaboration, but the latter reaches out to a larger basis of stakeholders and allows for a deeper commitment to whatever goals are decided upon collectively. Moreover, building common mission implies openness to review practices, processes and premises. The fourth model of leadership is more conducive than the others to forming partners in the common mission of Jesuit education.

5.5.2 – Four Ways of Educational Change

Andy Hargreaves retraces three ages of change from the nineteen-sixties to present in eight high schools in the United States and Canada. From the sixties to the late seventies, the period was characterized by “economic expansion and state investment in ‘Great Society’ initiatives” which “could start innovation and even spread it among enthusiasts”, especially because it captured the general spirit of those years in which “social reform, women’s equality, anti war protests and civil rights were prominent.”

The following period was marked by increasing competition among schools, which reflects the general characteristics of the bottom-up model of leadership. Notwithstanding heavy imposition of prescriptive reforms and

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emphasis on standardized tests, schools developed higher knowledge by getting teachers to address the challenges they faced together. “The more innovative schools that had leaders who were able to help teachers interpret the complexity [of the moment] together, succeeded in maintaining their missions while still addressing the standards.” Schools with less creative leaders, however, were not so successful, which confirms the shortcomings of the vertical leadership style, be it top-down or bottom-up. Paternalistic leadership strategies are not sustainable because they do not foster collective empowerment.

Reaction against this period, marked by inequality among schools, triggered revivalist procedures that emphasized a return to standardization and certainty. However, they fell short of the new cultural features, societal expectations and demands of knowledge-economies. In other words, a return to sheer top-down, government-sponsored reform style had become impractical. But Hargreaves is also critical of the three intertwining paths that characterized the third way of educational change, namely, autocracy, technocracy and effervescence. He summarizes the characteristics of what he calls New Orthodoxy by stating that new means (technocracy) were employed only to deliver old practices of government standardization in a way (autocracy) that created high levels of emotional distress (effervescence) among faculty. In his words: “The government’s goals and targets are no longer imposed upon teachers but delivered by educators themselves through self-surveillance and emotional effervescence.” The common denominator between Hargreaves’s research and

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39 Ibid., 15-16.
40 Ibid., 21.
the third model of leadership in the history of corporate responsibility as shown above is the lack of true and sustainable empowerment among stakeholders.

Hargreaves’s Fourth Way of educational change relies on five pillars of purpose and partnership, three principles of professionalism and four catalysts of coherence. The five pillars are: 1) an inspiring and inclusive vision; 2) public engagement, which ties schools to society at large, acknowledging and empowering external stakeholders; 3) strong and comprehensive financial investment to back innovative ideas; 4) corporate educational responsibility, which expands schools’ bottom-line; and 5) across-the-board partnership for educational change, including students’ input.

The three principles of professionalism draw upon the fact that no sustainable change in schools can be accomplished if it ignores or bypasses the teacher. They are: 1) high quality and high status teachers who benefit from “supportive working conditions, sufficient pay, professional autonomy and an inclusive educational and social mission;”41 2) continuing professional learning and self-regulating professional bodies in teaching; and 3) lively and learning communities in which teachers “engage in multiple learning teams to improve their practice, not just in mandated meetings that are directly connected to test results. Teachers and administrators define their focus and set targets together rather than the principal or district doing it for them.”42

Lastly, the catalysts of coherence deal with the same under-girding concern that I attempt to address throughout this dissertation. Hargreaves gives

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41 Ibid., 28.
42 Ibid., 31-32.
expression to it by referring to the challenge of “how to bring diverse people together to work skillfully and effectively for a common cause that lifts them up and has them moving in the same direction.” The four catalysts are: 1) sustainable, distributed leadership, which “draws change out of staff [a community of experts], rather than driving reforms through them;” 2) a network of teachers as co-learners, because “teachers and schools learn best not by reading research reports, listening to speeches or attending workshops, but by watching, listening to and learning from each other;” 3) a culture of trust, cooperation, commitment and responsibility, rather than accountability or a way of treating the latter that makes it “the conscience of the system that checks it, not the ego or the id that drives it;” and 4) the double principle of building from the bottom and steering from the top, which is capable of empowering creative teachers to commit themselves to shared targets, high standards and a common mission. Moreover, educators build responsible and life-giving professional learning communities which operate in networks that improve from both outside and inside influence.

5.6 – Conclusion to Chapter Five

I contend that the operative principle of decision as I have been discussing it in this chapter is a wise corollary to the pedagogy of personal change that is fostered by the SE. In the very specific context of a retreat in which spiritual

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43 Ibid., 32-33.
44 Ibid., 35.
45 Ibid., 35.
46 Ibid., 40.
conversion toward a deeper discipleship of Jesus Christ in the Church is at stake, the SE promote sustainable growth because they embed fourth-wave values in their methodology. First of all, retreatants and spiritual directors form a learning community whose decision-making process is neither top-down nor bottom-up. Moreover, exercitants will come to make their election after careful and discerning consideration of their own deepest desires and truth, which is then exposed to the inspiring life and mission of Jesus Christ. As the process unfolds, the retreatants discern and decide (elect) in which direction they feel moved with the desire to serve (diakonia) that which will become a shared mission between the Lord and them, within the greater community of meaning of the Church, and for the life of the world.

What the fourth wave of change brings to the other leadership models is better internal and external sustainability. Internal sustainability has to do with engaging people in the process of a common mission in a way that goes beyond mere compliance. External sustainability equips organizations to pursue creative fidelity to their identity amid ever-changing conditions, besides pushing them to genuine commitment to the common good. To that end, fourth-wave formation processes bring more stakeholders to the table and are not afraid of constant critical revision of not only practices, but also of processes and even premises of their modus operandi.

The SE embrace fourth-wave principles in a unique way. They empower exercitants through discernment, desire, diakonia and decision, thus achieving personal and internal sustainability. Moreover, retreatants are invited to open
themselves to and take into consideration a diverse array of states of life and human living situations through the contemplation of the scenes of the life of Jesus. Nothing that is authentically human is left out of the discernment to choose that which is more conducive to the end for which the exercitants are created. The elements that convey external sustainability are: 1) a vast horizon of freedom; 2) the fact that inspiration comes both from inside and outside of the person; and 3) the bond with the common mission of the Church for the life of the world.

Sustainable survival of the Jesuit tradition in education depends on the formation of a large base of stakeholders in the common mission of Jesuit schools. The operative principles as they arise from the SE are the frame of reference for formation programs to that end. The goal is to make educators reclaim their vocation as human beings in the world and as professional teachers and administrators at the Jesuit school where they work. Then, they are exposed to the inspiring documents that lay out the vision and mission of Jesuit education, focusing on the contemplation of the kind of person they want to become (personal election), but also the person they want to teach, inform, form and transform (participation in the mission of Jesuit education).

The leadership model of the formation programs that I envision in the dissertation mirrors fourth-wave principles insofar as they give priority to inquiry and reflection rather than advocacy. Educators are invited to actively contribute to the visioning process that allows for creative fidelity to the tradition of Jesuit education. Peter Senge states that the most important element in a visioning process is reflective inquiry. For the theorist and proponent of systems thinking,
in order to attain a shared and common mission, “it is reflective inquiry into the future [that] we truly seek to create. If it becomes a pure advocacy process, it will result in compliance, at best, not commitment.”

Jesuit schools share in an educational mission that is more than four-hundred years old and keeps influencing students’ lives, their families, educators, cultures and societies all over the world. Each Jesuit school struggles with the challenge of passing on this centuries-old tradition to the next generation. Forming partners in the common mission of Jesuit education is about engaging faculty and staff in conversation in order to build a shared and evolving vision of enhanced educational experiences for all.

Lastly, the collaborative leadership model that is shaped by the operative principles of the SE benefits not only the authentic charism of Jesuit schools but also the educators who work in them. Conversely, when faculty and staff are empowered through discernment, desire, diakonia and decision, schools also come to their fullness. In the words of Amalee Meehan, “we must offer teachers the possibility of an integrated spiritual pedagogy, one that is ongoing and relevant and addresses their expressed needs and interests; […] when teachers are in a healthy happy place, supported personally and vocationally, they cannot but become realized in the quality of their teaching.”

Education that is well done according to what led Jesuits to open schools in the first place is pivotal for the healthy survival of the Jesuit tradition in education. In this dissertation, I suggest

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48 Amalee Meehan, “Thriving or Surviving: Reclaiming the Ignatian Spiritual Tradition as a Resource for Sustaining Teachers Today” (Ph.D. Dissertation, Boston College Graduate School of Arts and Sciences Institute of Religious Education and Pastoral Ministry, 2008), 168.
that educators who are vocationally attuned with who they are and desire to be, and who constantly discern and decide how they want to live out their Ignatian-pedagogy-inspired educational endeavors are the most sustainable way to foster the common mission of Jesuit schools.
Conclusion

My question throughout the dissertation is this: How to form partners in education to share in the common mission of Jesuit schools? The result of my research is a “4-D pedagogy” inspired by the *Spiritual Exercises* (SE) of Saint Ignatius of Loyola (1491-1556). I contend that such a pedagogy needs to be operative when Jesuit schools design formation programs in the Jesuit educational tradition for their faculty and staff. The four “Ds” stand for *Discernment*, *Desire*, *Diakonia* and *Decision*. These are the same operative principles that allowed Ignatius to frame the prayerful spiritual itinerary of the SE for exercitants who wanted to make progress in Christian discipleship and become more faithful followers of Jesus Christ in the Church and for the life of the world.

Ignatius composed his SE as guidelines for a thirty-day retreat in which both the director of the experience—the one who gives the SE—and the retreatants could be helped along a sure path to attain the goal of the retreat, namely, “to overcome oneself and to order one’s life, without reaching a decision through some disordered affection.”¹ As explained in Chapter Four, the goal within the goal of the SE is the election of a state of life by the exercitants or the reformation of their current one in order to follow Jesus more closely. Throughout the dissertation, however, I read the SE as a source of operative principles for formation programs that Jesuit schools put forward to form partners in the common mission of Jesuit education. I assert an analogy between the pedagogical

dynamic of the SE and the structure that should mark formation programs for faculty and staff.

In the dissertation, I foster a sustainable vision of formation that enhances the viability of the more than four-century-old Jesuit tradition in education. In the near future—if not already in the present in many places—Jesuits arguably will no longer be present in significant numbers as teachers or administrators in Jesuit schools at all levels, that is, primary, secondary or higher education. My vision relies on faculty, staff, students, families and Jesuits who own for themselves the mission of Jesuit education and thus become partners in the task of keeping it alive and relevant for our times. I have demonstrated that the training strategy and pedagogical wisdom integral to the SE is the most adequate source of operative principles to guide formation programs in Jesuit education.\(^2\)

**The SE as the Ignatian Way**

At the beginning of my research, I was animated by a personal insight into Ignatius’s unique spiritual legacy, which he communicated to the members of the religious order he founded—the Society of Jesus—and to those who would embrace Ignatian spirituality along the centuries, namely, his SE. Spirituality here means Ignatius’s concrete response to the Christian message and his way of living by the gospels. The spirituality of the founder of the Jesuits certainly is one of the “diverse ways we answer the heart’s longing to be connected with the largeness of

\(^2\) For practical reasons, I concentrated my remarks on formation programs for personnel of Jesuit schools. Therefore, I often referred to the term “educators”, by which I meant faculty and administrators who work at Jesuit educational institutions, and not to students and their families.
life”, as Parker Palmer speaks of the spiritual life of people in general and teachers in particular.³

The uniqueness of Ignatius’s legacy lies in the SE. Many spiritual masters left inspiring writings about their visions or other mystical experiences. Their disciples then have access to journals, letters, rules and treatises that lay out spiritual insights and lead followers into the inspiring vision of their spiritual mentors. In some cases, however, it is mostly the work of biographers which constitutes the major sources to unveil the soul of great spiritual masters. But, as far as Ignatius is concerned, not only can we grasp his spirituality through all of the aforementioned means, but he himself blessed his companions with the very same itinerary that led him to craft his legacy as we know it today. It is true that anyone so inclined can live out today the charism of St. Francis of Assisi or St. Dominic—two saints Ignatius himself refers to as inspiring models for him in his Autobiography—in various circumstances of life because of their own writings or the works of those who wrote about them. But none of them left a carefully-crafted method such as the SE for people to follow in their footsteps and “become another Christ a la Francis or Dominic,” so to speak. In other words, what usually happens is that spiritual masters go through a deep spiritual experience which they or others translate into a particular charism or spirituality which in turn others can embrace after them. Ignatius, however, enables whoever makes the SE to retrace his own spiritual experience and come to embrace his own charism from the

inside, even though people bring their uniqueness, namely, who they are and what they have, to the retreat.

To this extent, the SE are literally pedagogical in the sense that they reflect the roots of the term “pedagogy”, that is, to lead a child, from the Greek words paid (child) and ágein (lead). Moreover, the SE are educational as long as they intend to bring the best out of people and lead them to spiritual freedom. This is also related to the roots of the term “education”, namely, the Latin words ex (out) and ducere (lead). Beginning with Plato, education has been often compared indeed to the work of midwives. Therefore, it is not a coincidence that the SE ended up giving a formative configuration to the missionary work of the Jesuits in general and shaping the commitment of the Jesuit order to formal education in particular. The overarching goal of helping souls that appears in the 1540 foundational document of the Society of Jesus—the Formula of the Institute—encounters one of its most visible and effective expressions in the institutions founded by the Jesuits for the formal education of youth.

In sum, I contend that there must be a correlation between the modus operandi of the SE in forming disciples of Christ and the way Jesuit schools ought to form their educators to become partners in the common mission of Jesuit education. Although faculty, staff and administrators are not always ready for or willing to enter the formal experience of the thirty-day retreat in any of its modalities, I am convinced that Jesuit education can survive only where there is a quantitatively significant and qualitatively critical mass of educators who have been transformed and have become inspired from within by the major tenets of
the Jesuit tradition in education. As in the examples given above, the Ignatian way differs from the Franciscan or Dominican ones. People adhere to the charism of St. Francis or St. Dominic as a fait accompli. But people retrace for themselves Ignatius’s own pilgrimage to become in turn—or not—apostles and educators in the Ignatian way. This is what I mean by the expression of forming from within that very same SE-based Jesuit tradition in education.

**Discernment**

*Discernment* is the under-girding operative principle in Jesuit spirituality and thus in Jesuit education. There are many ways to capture the essence of the education that Jesuit schools want to convey. Fr. Arrupe’s clear message was to educate men and women for others. Fr. Kolvenbach, his successor, contemplated the Jesuit-school graduate as someone who is equipped to be in a well-educated solidarity with those in need for a better world for all. Academic excellence, compassionate reflection vis-à-vis the problems of the world or the ability to see God in all things are also powerful mottoes which try to sum up the various dimensions of the Jesuit tradition in education. From general principles down to the concrete applications of the *Ignatian Pedagogy: A Practical Approach* (IPPA, 1993), Jesuit schools strive to educate at the intersection of experience, reflection and action within the framework of students’ context and always attentive to a mode of evaluation that looks mostly into how learning shapes one’s lifestyle and can be improved in the future, rather than how much information has been
retained or piled up as if in storage. But it is the ability to form people of 

*discernment* that constitutes the chief characteristic of Jesuit education.

In the SE, the rules for the discernment of spirits do not aim only at 
helping the retreatants to distinguish good from evil. Chiefly, they echo Ignatius’s 
central insight about God communicating God’s will to human beings. As a 
matter of fact, Ignatius realized first that internal movements come from different 
 sources. More concretely, he learned that the alternating spiritual consolation and 
desolation which he experienced during the period he was convalescing from the 
wounds he had suffered at the battle of Pamplona in 1521 could not equally 
proceed from God. But later he started to notice that consolation was an 
experience that varied in significance. Thus, it was necessary to discern which 
consolation would lead him to a deeper spiritual growth. Therefore, the rules for 
the discernment of spirits in the SE were written first and foremost to enlighten 
the retreatants about the existence of internal movements, especially consolation 
and desolation. Furthermore, the exercitants learn a lifestyle that leads them to 
assess and choose among the good alternatives available only that which is more 
conducive to the end for which they are created.

*Discernment* in Jesuit education is the ability to constantly ask for the best 
ways to achieve the goals of the integral formation of the person that has 
characterized the educational endeavors of Jesuit schools throughout the 
centuries. At the level of practices, *discernment* translates into active-learning 
techniques in the classroom. At the process level, it encourages critical thinking 
and fosters reflection upon the macro and micro choices that educators make
everyday. Finally, premises-wise, *discernment* shapes the response that Jesuit schools give to the various educational challenges they need to confront everyday.

In his July 13, 2009 address on the occasion of the one-hundred-fiftieth anniversary of Jesuit education in the Philippines, the current Superior General of the Society of Jesus, Fr. Adolfo Nicolás, applied the concept of spiritual discernment to the mission of Jesuit education with these words:

> [T]he test of whether our education is one of depth is whether we are able to produce people who can “decide from inside”—which is another way of saying that the test of Jesuit education is if we are able to produce people of discernment. More and more, people are making choices, not from the inner realm of faith, conscience, values, truth, but from the seductive voices coming from the outside, of gain, profit, public opinion, convenience and fashion. People are becoming weaker in the habit of finding in the depths of the heart the answers to difficult emerging questions.4

Jesuit schools, willing to educate people who can decide from inside, need to rely upon educators who have been themselves formed into becoming people of *discernment*.

**The First Question in Jesuit Education**

The first question in Jesuit education is: Who is the student? Content and technique come second. Therefore, formation programs to form partners in the common mission of Jesuit education need to pay attention in order to empower educators to figure out for themselves who they are and who they feel called to be. This is why I contend that the operative principle of the first movement of those programs needs to be *desire*.

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Desire also corresponds to the operative principle of the first movement of the SE. When Ignatius devised his SE, he laid out a method based on the assumption that, if the exercitants were given personal attention and came to the retreat with a spirit of openness and generosity, they would be able to hear the voice of God speaking to them in a deeply personal way. But the SE also accomplished another task, namely, that retreatants could dispose themselves to achieve their own vocational awareness. In other words, Ignatius’s genius is that, at the end of the SE, not only have the exercitants “experienced God, but [have] also emerged from the retreat having absorbed and practiced the means by which [they] can renew and deepen this experience.”

In the dissertation, I contend that the first means for educators to renew and deepen their personal and professional vocation is to be in touch with their deepest desires in a discerning way. Jesuit schools need to be the kind of learning communities that offer a safe place for educators to freely explore their inner true selves, where vocations lie.

In the first movement or week of the SE, the primacy of God’s active love in us, despite the reality of sin, empowers the retreatants to ask the question: “What ought I do for Christ?” Formation programs as envisioned in this dissertation must provide educators with the invitation to renew the in-depth motivations that brought them to the teaching profession in the first place. Parker Palmer contends indeed that many people become educators because they want to make a difference in the lives of others. He identifies the primacy of reasons of

the heart, even if teachers are also animated by an interest toward a specific area of science. He goes on to say that many teachers were “drawn to a body of knowledge because it shed light on [their] identity as well as on the world.”

In sum, Jesuit schools need to form educators to be in touch with their “inside” (deepest desires) if they want to educate people who can “decide from inside.” Discernment and desire walk hand in hand in programs that aim at forming partners in the common mission of Jesuit education.

**After “Freedom from” Comes “Freedom to”**

The retreatants come to the end of the first week of the SE moved with the desire to be at the service of Jesus Christ. They are guided to acknowledge that God’s love is not an abstraction but rather the incarnated person, words and deeds of the Lord. Jesus is the Reign of God at hand. Therefore, not only is he the announcer of the good news of salvation but also the redeemer and savior himself by the grace of God the Father and in the fellowship of the Holy Spirit.

During the second movement of the SE (which expands beyond the second week of the retreat into the third and fourth ones), Ignatius channels the exercitant’s desires by inviting them to contemplate several scenes from the life and ministry of Jesus. Within the second movement of the SE, and more specifically at the end of the second week, the retreatants are enabled to make an election (third movement of the SE) of the state of life in which they feel called to follow the Lord. Ignatius also takes into account the exercitants who may already

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be bound by matrimony, religious vows or holy orders before making the SE. In this case, they will reform their lifestyle by choosing only that which is more conducive to the end for which they are created.

Therefore, the movements interplay in the process of discernment that takes place during the SE, namely: 1) freedom from the slavery of sin, which liberates the deepest desires to order one’s life; 2) inspiration from the affective knowledge of the liberator from sin that is Jesus, which shapes the desire to order one’s life by serving him (diakonia); and 3) freedom to make a decision about how to serve the Lord, which remains grounded in the relationship between the retreatants and Jesus. As a matter of fact, Christian faith “teaches us that self-realization comes from self-giving and that freedom is not so much the power to choose as the power to order our choices toward love.”

Analogously, I envision formation programs that are designed to free educators from stifling constraints on their professional endeavors such as, for instance, a soulless approach to education or a competition-driven understanding of the human beings whom schools educate. Moreover, I hope that those formation programs may free educators to embrace for themselves the Jesuit tradition in education, thereby “deciding from inside” and electing the Ignatian way in faithfulness both to their deepest desires and to the integral student—men and women with and for others—whom Jesuit schools strive to educate.

The mission of Jesuit education is actually a statement about humankind, namely, that human beings are created to be free. The Christian understanding of

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freedom states that people are created to be agents of God’s reign. Jesuit schools educate for that kind of freedom which realizes itself when people discern and choose a mission in life because it fulfills their deepest desires as they meet something of the world’s deepest needs. It is only logical to expect that Jesuit schools seek to intentionally form their educators to be able to become partners of that same mission.

**Implications for Policy, Practice and Research**

Upstream from doctoral dissertations in religion and education such as this, one finds academic research that draws on various tributaries corresponding to different fields of science. Downstream from those doctoral dissertations, one is led to multiple implications of, as well as challenges from their conclusions. These are some reflections at the conclusion of my research about forming leadership in Jesuit education.

First and foremost, Jesuit schools need to have a capable team whose main task is to form faculty and staff in the Jesuit tradition in education. Where schools cannot afford to create and sustain such a task force, they ought to work in network with others in order to offer formation programs that generate partners in the common mission of Jesuit education. Some examples of networks are: 1) regional, national or international associations of Jesuit schools, 2) pedagogical centers for research in and support to continuing education of faculty and staff in the characteristics of Jesuit education, and 3) organizations that make available
best formation practices in different schools through journals and others means of communication.

Cross-school networks do not substitute for local initiative however. Each Jesuit school needs to have at least one leader with responsibility within its organizational chart in order to oversee that there is an intentional and coordinated effort to form partners in the common mission of Jesuit education. Most importantly, each Jesuit educational institution needs to make it clear that its faculty and staff are expected to become partners in the common mission of the school as this dissertation explains it. This is not an easy task, especially in countries where organizational culture in general is not conducive to collaborative leadership. But faithfulness to Jesuit educational goals requires educators who understand their professional commitment beyond sheer execution of job description charts. Even if it is not reasonable to expect that all employees attain leadership or partnership quality, it is desirable that Jesuit schools overtly operate out of a leadership paradigm which implies empowerment of educators and collaboration at all levels. “Central to any Jesuit work is the development of human potential,”8 states William Bryon. Such a claim also concerns those who educate the students of Jesuit schools. To work at Jesuit schools in any capacity needs to entail the awareness that one is called to grow and to help others to grow to achieve that for which human beings are created.

Leadership at any level that oversees formation for partnership in mission also has the responsibility to provide for the formation of future leaders. Ideally,

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people in positions of leadership in Jesuit schools are men and women who, on the one hand, constantly discern their own vocation in life and at work and, on the other hand, foster the 4-D pedagogy among faculty and staff who have the potential to take over after them.

The dissertation speaks about Jesuit schools as educational institutions founded and still related to the Jesuit order, but not necessarily owned by the members of the Society of Jesus. In any event, I foster a model of invitational leadership that is sustainable because it relies on the formation of stakeholders of an enterprise that is common to all. Even though the Society of Jesus remains the ordinary and in many cases regulatory inspirational means through which those schools can claim the modifier “Jesuit”, my research clearly indicates a shift in the dynamics of leadership within Jesuit educational institutions. Certainly, the role of each constituency—namely, administrators, academic departments, etc.—can be determined by well-crafted juridical documents, such as the statutes of the boards of trustees of Jesuit colleges and universities in the United States. However, there remains a challenge vis-à-vis the understanding of the type of connection that exists between individual Jesuits and the schools to which they are assigned by their superiors. Sometimes, they are bound by legal contracts to do their work at the school and thus are part of a hierarchical organizational chart. But labor laws may vary and their status may be different from the non-Jesuit employees. In any event, for all practical reasons Jesuits usually are no longer the only legitimate source of the mission of the school, and yet they often have a unique role in the dynamic of Jesuit schools.
Many educational institutions have been founded to be the degree-granting branch of religious communities only to lose their confessional character throughout the years. In many instances, their primary goal was the formation of well-educated religious ministers for their worship communities and an elite of lay faithful who, because of their training, would be able to occupy important places in society, thus fostering the ideals and values of their own religious denomination. The process of secularization of such schools is a field of research that can shed light on how Jesuit schools can be best prepared for a time in which, most likely, Jesuit schools will no longer have significant numbers of Jesuits working in them. This dissertation offers one answer to the challenge, which is derivative of the core of Jesuit life and apostolate, namely the SE of Ignatius of Loyola. However, I am certain that I could learn much from, for example, the evolution in the understanding of: 1) the place of theology in academe; 2) the role of religion in formal education as many countries became knowledge-based and technology-driven societies; and 3) the models of leadership that have prevailed in those educational institutions which distanced themselves from their religious foundation.

What are the best practices to hire for mission? Although the dissertation does not apply the four operative principles to people who do not work in Jesuit schools yet, it does suggest certain implications for the hiring process. In other words, it can be interpreted that Jesuit schools should make it clear that they are not interested only in hiring people who envisage themselves as becoming partners in the mission of Jesuit education. But it may happen that candidates
think of their place of work as having no connection with their community or communities of meaning, if they have any. Moreover, some people do not intend to pursue their vocation in the world, let alone in the workplace, or help others to do so. As a matter of fact, I envision a certain type of professional learning community that requires openness toward a plan that, to some extent, goes beyond the rigidly demarked arena of professional relations, rights and obligations. However, these implications need to translate into future research on hiring policies in general, and into inquiry about how Ignatian educators reflect and discern about their future co-workers in particular.

Lastly, the dissertation now demands the work of designing actual formation programs with their specific activities and overall format, which cannot be achieved without taking into consideration particular contexts. Local leaders in Jesuit schools are better placed to incarnate the four operative principles in exercises which can effectively and affectively engage educators in the task of becoming partners in the mission of Jesuit education. This is what I intend to effect upon return to my own cultural context of Brazil.
## Appendix 1

### SUMMARY STATISTICS

**2008**

### 1. Educational Institutions

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<th>NETWORKS</th>
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<td>Total in 20 countries</td>
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<tr>
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### 2. Students

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<th>Networks**</th>
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<td>61,536</td>
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### 3. Personnel (Teachers and Administrators)

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<td><strong>TOTAL</strong></td>
<td>3,732</td>
<td>130,571</td>
<td>134,303</td>
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</table>

** Most of these are Fé y Alegría schools.

2006 Fé y Alegría official statistics.

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1 Available from: [http://www.sjweb.info/education/stats.cfm](http://www.sjweb.info/education/stats.cfm)
Appendix 21

“Introductory Explanation, to gain some understanding of the Spiritual Exercises which follow, and to aid both the one who gives them and the one who is to receive them.

The First Explanation. By the term Spiritual Exercises we mean every method of examination of conscience, meditation, contemplation, vocal or mental prayer, and other spiritual activities, such as will be mentioned later. For, just as taking a walk, traveling on foot and running are physical exercises, so is the name of spiritual exercises given to any means of preparing and disposing our soul to rid itself of all disordered affections and then, after their removal, of seeking and finding God’s will in the ordering of our life for the salvation of our soul.

The Second. The person who gives to another the method and procedure for meditating or contemplating should accurately narrate the history contained in the contemplation or meditation, going over the points with only a brief explanation. For in this way the person who is contemplating, by taking this history as the authentic foundation, and by reflecting on it and reasoning about it for oneself, can thus discover something that will bring better understanding or a more personalized concept of the history—either through one’s own reasoning or insofar as the understanding is enlightened by God’s grace. This brings more spiritual relish and spiritual fruit than if the one giving the Exercises had lengthily explained and amplified the meaning of the history. For what fills and satisfies the

soul consists, not in knowing much, but in our understanding the realities profoundly and in savoring them interiorly.

The Third. In all the following Spiritual Exercises we use the acts of the intellect in reasoning and of the will in eliciting acts of the affections. In regard to the affective acts which spring from the will we should note that when we are conversing with God our Lord or his saints vocally or mentally, greater reverence is demanded of us than when we are using the intellect to understand.

The Fourth. Four Weeks are taken for the following Exercises, corresponding to the four parts into which they are divided. That is, the First Week is devoted to the consideration and contemplation of sins; the Second, to the life of Christ our Lord up to and including Palm Sunday; the Third, to the Passion of Christ our Lord; and the Fourth, to the Resurrection and Ascension. To this Week are appended the Three Methods of Praying. However, this does not mean that each Week must necessarily consist of seven or eight days. For during the First Week some persons happen to be slower in finding what they are seeking, that is, contrition, sorrow, and tears for their sins. Similarly, some persons work more diligently than others, and are more pushed back and forth and tested by different spirits. In some cases, the Week needs to be shortened, and in others lengthened. This holds as well for all the following Weeks, while the retreatant is seeking what corresponds to their subject matter. But the Exercises ought to be completed in thirty days, more or less.

The Fifth. The persons who make the Exercises will benefit greatly by entering upon them with great spirit and generosity toward their Creator and Lord,
and by offering all their desires and freedom to him so that His Divine Majesty can make use of their persons and of all they possess in whatsoever way is in accord with his most holy will.

_The Sixth._ When the one giving the Exercises notices that the exercitant is not experiencing any spiritual motions in his or her soul, such as consolations or desolations, or is not being moved one way or another by different spirits, the director should question the retreatant much about the Exercises: Whether he or she is making them at the appointed times, how they are being made, and whether the Additional Directives are being diligently observed. The director should ask about each of these items in particular. Consolation and desolation are treated in [316-324], the Additional Directives in [73-90].

_The Seventh._ If the giver of the Exercises sees that the one making them is experiencing desolation and temptation, he or she should not treat the retreatant severely or harshly, but gently and kingly. The director should encourage and strengthen the exercitant for the future, unmask the deceptive tactics of the enemy of our human nature, and help the retreatant to prepare and dispose himself or herself for the contemplation which will come.

_The Eight._ According to the need perceived in the exercitant with respect to the desolations and deceptive tactics of the enemy, and also the consolations, the giver of the Exercises may explain to the retreatant the rules of the First and Second Weeks for recognizing the different kinds of spirits, in [313-327 and 328-336].
The Ninth. This point should be noticed. When an exercitant spiritually inexperienced is going though the First Week of the Exercises, he or she may be tempted grossly and openly, for example, by being shown obstacles to going forward in the service of God our Lord, in the form of hardships, shame, fear about worldly honor, and the like. In such a case the one giving the Exercises should not explain to this retreatant the rules on different kinds of spirits for the Second Week. For to the same extent that the rules of the First Week will help him or her, those of the Second Week will be harmful. They are too subtle and advanced for such a one to understand.

The Tenth. When the one giving the Exercises perceives that the retreatant is being assailed and tempted under the appearance of good, the proper time has come to explain to the retreatant the rules of the Second Week mentioned just above. For ordinarily the enemy of human nature tempts under the appearance of good more often when a person is performing the Exercises in the illuminative life, which corresponds to the Exercises of the Second Week, than in the purgative life, which corresponds to those of the First Week.

The Eleventh. It is helpful for a person receiving the Exercises of the First Week to know nothing about what is to be done in the Second, but to work diligently during the First Week at obtaining what he or she is seeking, just as if there were no anticipation of finding anything good in the Second.

The Twelfth. The one giving the Exercises should insist strongly with the person making them that he or she should remain for a full hour in each of the five Exercises or contemplations which will be made each day; and further, that
the recipient should make sure always to have the satisfaction of knowing that a full hour was spent on the exercise—indeed, more rather than less. For the enemy usually exerts special efforts to get a person to shorten the hour of contemplation, meditation, or prayer.

The Thirteenth. This too should be noted. In time of consolation it is easy and scarcely taxing to remain in contemplation for a full hour, but during desolation it is very hard to fill out the time. Hence, to act against the desolation and overcome the temptations, the exercitant ought to remain always a little longer than the full hour, and in this way become accustomed not merely to resist the enemy but even to defeat him.

The Fourteenth. If the one giving the Exercises sees that the exercitant is proceeding with consolation and great fervor, he or she should warn the person not to make some promise or vow which is unconsidered or hasty. The more unstable the director sees the exercitant to be, the more earnest should be the forewarning and caution. For although it is altogether right for someone to advise another to enter religious life, which entails the taking of vows of obedience, poverty, and chastity; and although a good work done under a vow is more meritorious than one done without it, still one ought to bestow much thought on the strength and suitability of each person, and on the helps or hindrances one is likely to meet with in carrying out what one wishes to promise.

The Fifteenth. The one giving the Exercises should not urge the one receiving them toward poverty or any other promise more than toward their opposites, or to one state or manner of living more than to another. Outside the
Exercises it is lawful and meritorious for us to counsel those who are probably suitable for it to choose continence, virginity, religious life, and all forms of evangelical perfection. But during these Spiritual Exercises when a person is seeking God’s will, it is more appropriate and far better that the Creator and Lord himself should communicate himself to the devout soul, embracing it in love and praise, and disposing it for the way which will enable the soul to serve him better in the future. Accordingly, the one giving the Exercises ought not to lean or incline in either direction but rather, while standing by like the pointer of a scale in equilibrium, to allow the Creator to deal immediately with the creature and the creature with its Creator and Lord.

_The Sixteenth_. For this purpose—namely, that the Creator and Lord may with greater certainty be the one working in his creature—if by chance the exercitant feels an affection or inclination to something in a disordered way, it is profitable for that person to strive with all possible effort to come over to the opposite of that to which he or she is wrongly attached. Thus, if someone is inclined to pursue and hold on to an office or benefice, not for the honor and glory of God our Lord or for the spiritual welfare of souls, but rather for one’s own temporal advantages and interests, one should try to bring oneself to desire the opposite. One should make earnest prayers and other spiritual exercises and ask God our Lord for the contrary; that is, to have no desire for this office or benefice or anything else unless the Divine Majesty has put proper order into those desires, and has by this means so changed one’s earlier attachment that one’s motive in
desiring or holding on to one thing rather than another will now be only the service, honor, and glory of the Divine Majesty.

*The Seventeenth.* It is very advantageous that the one who is giving the Exercises, without wishing to ask about or know the exercitant’s personal thoughts or sins should be faithfully informed about the various agitations and thoughts which the different spirits stir up in the retreatant. For then, in accordance with the person’s greater or lesser progress, the director will be able to communicate spiritual exercises adapted to the needs of the person who is agitated in this way.

*The Eighteenth.* The Spiritual Exercises should be adapted to the disposition of the persons who desire to make them, that is, to their age, education, and ability. In this way someone who is uneducated or has a weak constitution will not be given things he or she cannot well bear or profit from without fatigue.

Similarly exercitants should be given, each one, as much as they are willing to dispose themselves to receive, for their greater help and progress.

Consequently, a person who wants help to get some instruction and reach a certain level of peace of soul can be given the Particular Examen [24-31], and then the general Examen [32-43], and further, the Method of praying, for a half hour in the morning, on the Commandments [238-243], the Capital Sins [244-245], and other such procedures [238; 246-260]. Such a person can also be encouraged to weekly confession of sins and, if possible, to reception of the Eucharist every two weeks or, if better disposed, weekly. This procedure is more
appropriate for persons who are rather simple or illiterate. They should be given an explanation of each of the commandments, the seven capital sins, the precepts of the Church, the five senses, and the works of mercy.

Likewise, if the one giving the exercises sees that the one making them is a person poorly qualified or of little natural ability from whom much fruit is not to be expected, it is preferable to give to such a one some of these light exercises until he or she has confessed, and then to give ways of examining one’s conscience and a program for confession more frequently than before, that the person may preserve what has been acquired. But this should be done without going on to matters pertaining to the Election or to other Exercises beyond the First Week. This is especially the case when there are others with whom greater results can be achieved. There is not sufficient time to do everything.

*The Nineteenth.* A person who is involved in public affairs or pressing occupations but educated or intelligent may take an hour and a half each day to perform the Exercises. To such a one the director can explain the end for which human beings are created. Then he or she can explain for half an hour the particular examen, then the general examen, and the method of confessing and receiving the Eucharist. For three days this exercitant should make a meditation for an hour each morning on the first, second, and third sins [45-53]; then for another three days at the same hour the meditation on the court-record of one’s own sins [55-61]; then for a further three days at the same hour the meditation on the punishment corresponding to sins [65-72]. During these three meditations the ten Additional Directives [73-90] should be given the exercitant. For the
mysteries of Christ our Lord this exercitant should follow the same procedure as
is explained below and at length throughout the Exercises themselves.

The Twentieth. A person who is more disengaged, and who desires to
make all the progress possible, should be given all the Spiritual Exercises in the
same sequence in which they proceed below. Ordinarily, in making them an
exercitant will achieve more progress the more he or she withdraws from all
friends and acquaintances, and from all earthly concerns; for example, by moving
out of one’s place of residence and taking a different house or room where one
can live in the greatest possible solitude, and thus be free to attend Mass and
Vespers daily without fear of hindrance from acquaintances. Three principal
advantages flow from this seclusion, among many others.

First, by withdrawing from friends and acquaintances and likewise from
various activities that are not well ordered, in order to serve and praise God our
Lord, we gain much merit in the eyes of the Divine Majesty.

Second, by being secluded in this way and not having our mind divided
among many matters, but by concentrating instead all our attention on one alone,
namely, the service of our Creator and our own spiritual progress, we enjoy a
freer use of our natural faculties for seeking, diligently what we so ardently
desire.

Third, the more we keep ourselves alone and secluded, the more fit do we
make ourselves to approach and attain to our Creator and Lord; and the more we
unite ourselves to him in this way, the more do we dispose ourselves to receive
graces and gifts from his divine and supreme goodness.”
Appendix 3

Table of Contents of the *Ratio Studiorum* (1599)

- Letter by Fr. James Domenichi, S.J., Secretary, on behalf of the Reverend Superior General of the Society of Jesus, Fr. Claudio Acquaviva, S.J., dated January 8, 1599.
- Rules for the Provincial
- Rules for the Rector
- Rules for the Dean of Studies
- Common Rules for all Professors of Higher Classes
- Rules for the Professor of Sacred Scripture
- Rules for the Professor of Hebrew
- Rules for the Professor of Scholastic Theology
- Rules for the Professor of Conscience Casuistry
- Rules for the Professor of Philosophy
- Rules for the Professor of Moral Theology
- Rules for the Professor of Mathematics
- Rules for the Dean of Lower Classes
- Norms for Written Exams
- Norms for the Distribution of Prizes
- Common Rules for all Professors of Lower Classes
- Rules for the Professor of Rhetoric
- Rules for the Professor of Humanities (Classical or Pagan Literature)
- Rules for the Professor of the Advanced (Highest) Latin Grammar Class
- Rules for the Professor of the Intermediate Latin Grammar Class
- Rules for the Professor of the Introductory (Lowest) Latin Grammar Class
- Rules for the Scholastics of Our Society (Members of the Society of Jesus)

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Formation of Those Who, for Two Years, Study Theology in Private (Biennium of Private Study)
Rules for the Assistant to the Master or Beadle of Classes
Rules for Students Who Are Not Members of the Society of Jesus
Rules for the Academy (Presentations, Debates or Public Defenses)
Rules for the Academy of Theologians and Philosophers
Rules for the Dean of the Academy of Theologians and Philosophers
Rules for the Academy of Students of Rhetoric and Humanities
Rules for the Academy of Students of Grammar
Catalogue of Some Questions from the First Part of St. Thomas (Summa Theologica – Pars Prima)
Appendix 4†

(This outline puts into schematic form the relationship between the spiritual vision of Ignatius and the characteristics of Jesuit education. The nine points in the first column repeat the Ignatian headings for the first nine sections of the main body of the text; […]]. The 28 basic characteristics of Jesuit education are repeated in the second column, placed in a way that is intended to show their foundation in the Ignatian world view. This is not intended to show an exact parallel: rather than a direct application, it would be more accurate to say that the characteristics are derived from, or find their roots in, the Ignatian view.)

<table>
<thead>
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<th>THE IGNA'TI前进 WORLD-VIEW</th>
<th>JESUIT EDUCATION…</th>
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<tbody>
<tr>
<td><strong>1.</strong> For Ignatius, God is Creator and Lord, Supreme Goodness, the one Reality that is absolute; all other reality comes from God and has value only insofar as it leads us to God. This God is present in our lives, laboring for us in all things. God can be discovered through faith in all natural and human events, in history as a whole, and most especially in the lived experience of each individual person.</td>
<td>- is an apostolic instrument.</td>
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<td><strong>2.</strong> Each woman or man is personally known and loved by God. This love invites a response which, to be authentically human, must be an expression of a radical freedom. Therefore, in order to respond to the love of God, each person is called to be: – free to give of oneself, while accepting responsibility for and the</td>
<td>- includes a religious dimension that permeates the entire education. - is world-affirming, promotes dialogue between faith and culture and assists in the total formation of each person within the human community.</td>
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consequences of one’s actions: free to be faithful;
    – free to work in faith toward that true happiness which is the purpose of life: free to labor with others in the service of God’s Reign for the healing of creation

- emphasizes activity on the part of the student.

3. Because of sin, and the effects of sin, the freedom to respond to God’s love is not automatic. Aided and strengthened by the redeeming love of God, we are engaged in an ongoing struggle to recognize and work against the obstacles that block freedom, including the effects of sinfulness, while developing the capacities that are necessary for the exercise of true freedom.

    a. This freedom requires a genuine knowledge, love and acceptance of self, joined to a determination to be freed from any excessive attachment to wealth, fame, health, power or even life itself.
    b. True freedom also requires a realistic knowledge of the various forces present in the surrounding world and includes freedom from distorted perceptions of reality, warped values, rigid attitudes or surrender to narrow ideologies.
    c. To work this true freedom, one must learn to recognize and deal with the influences that can promote or limit freedom: the movements within one’s own heart; past experiences of all types; the interactions with other people; the dynamics of history, social structures and culture.

- encourages a realistic knowledge, love and acceptance of self.
- provides a realistic knowledge of the world in which we live.
- is value-oriented.

4. The world-view of Ignatius is centered on the historical person of Jesus. He is the model for human life because of his total response to the Father’s love, in the service of others.

    Jesus shares our human condition and invites us to follow him

- proposes Christ as the model of human life.
- provides adequate pastoral care.
under the standard of the cross, in loving response to the Father.

Jesus is alive in our midst and remains the Person for others in the service of God.

- celebrates faith in personal and community prayer, worship and service.

5. A loving and free response to God’s love cannot be merely speculative or theoretical. No matter what the cost, speculative principles must lead to decisive action, for love is shown in deeds.

Ignatius asks for the total and active commitment of men and women who, to imitate and be more like Christ, will put their ideals into practice in the real world of ideas, social movements, the family, business, political and legal structures and religious activities.

- is preparation for active life commitment.
- serves the faith that does justice.
- seeks to form men and women for others.
- manifests a particular concern for the poor.

6. For Ignatius, the response to the call of Christ is in and through the Catholic church, the instrument through which Christ is sacramentally present in the world. Mary, the Mother of Jesus, is the model of this response.

Ignatius and his first companions all were ordained as priests and they put the Society of Jesus at the service of the Vicar of Christ to be sent to any place for the greater glory of God and the good of souls.

- is an apostolic instrument, in service of the church as it serves human society.
- prepares students for active participation in the church and the local community for the service of others.

7. Repeatedly, Ignatius insisted on the *magis*—the more. His constant concern was for the greater service of God through a closer following of Christ, and that concern flowed into all the apostolic work of the first companions. The concrete response to God must be of greater value.

- pursues excellence in its work of formation.
- witnesses to excellence.

8. As Ignatius came to know the love of God revealed through Christ and began to respond by giving himself to the service of God’s Reign, he shared his experience and attracted

- stresses collaboration.
- relies on spirit of community among faculty, staff, Jesuit community, parents, students, former students and
companions who became friends in the Lord, in the service of others.

The strength of the community working in service of God’s reign is greater than that of each person or group of people.

<table>
<thead>
<tr>
<th>beneficiaries</th>
<th>- takes place within a structure that promotes community.</th>
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9. For Ignatius and for his companions, decisions were made on the basis of an ongoing process of personal and communal discernment, done always in a context of prayer. Through prayerful reflection on the results of their activities, the companions reviewed past decisions and made adaptations in their methods, in a constant search for greater service to God.

| - adapts means and methods in order to achieve its purposes most efficiently. |
| - in a system of schools with a common vision and common goals. |
| - assists in providing the professional training and ongoing formation that is needed, especially for teachers. |
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