



## **Apostolic Planning and the Spiritual Exercises: A Historical Perspective, 1965-2021**

---

In each of the three former Provinces, “Extraordinary Planning”<sup>1</sup> has occurred twice since Vatican II: between 1966 and 1971, and again between 1985 and 1989. Today the UEA Province finds itself on the threshold of the third instance. In the first instance, the impetus came from the 31<sup>st</sup> General Congregation; and in the second instance, from the 33<sup>rd</sup> General Congregation. And today, the development of “Apostolic Plans” by sixty-eight Provinces and Independent Regions across the globe has begun in the wake of the 36<sup>th</sup> General Congregation and gathered significant momentum since the publication of the *Universal Apostolic Preferences* in 2019.

---

<sup>1</sup> A Province-wide, multi-year process that creates a “Province Plan.” To a greater or lesser degree, a Province Plan reordered priorities and altered the distribution of Province resources. Today, the term “Province Plan” has been largely replaced across the Society of Jesus by the term “Apostolic Plan.” It is our impression that the descriptor, “Apostolic,” has several advantages over the descriptor “Province.” It is clearly a descriptor to which our lay colleagues can better relate. Whereas a Province Plan would not really include them directly, they will be partners in mission with Jesuits as we discern our shared apostolic future. In this document we will refer to the result of Extraordinary Planning as an Apostolic Plan.

A call to “Extraordinary Province Planning” was one of the first initiatives of each of the three Fathers General elected in those General Congregations: Pedro Arrupe, SJ, Peter Hans Kolvenbach, SJ and Arturo Sosa Abascal, SJ. We cannot find archival evidence of any of the three former Provinces independently proposing, developing, and completing and implementing an Apostolic Plan with the potential of reordering priorities. Rather, calls for this type of Extraordinary Province Planning have come from the Fathers General. Each of the three former Provinces responded energetically and generously to that call. For the first instance in 1966, the Society of Jesus had no formal governing or coordinating institutions between the General Curia and the Provinces, and each Province worked quite independently. In the United States, we should recall that the Jesuit Conference was not even created until 1972.<sup>2</sup>

In contrast to the “Extraordinary Planning” that created the “Apostolic Plan”, we should clarify that over this period, 1965-2021, “Ordinary Planning” has been a regular feature of the governance model of the three former Provinces, but the scale of the Planning was more narrowly focused on “apostolic sectors” like “parishes” and less ambitious in terms of its reach into the future. Archival material from each of the three former Provinces confirms this. Archival material does not give evidence that ordinary planning including any major questioning or prolonged discussion of long-standing assumptions about any apostolic sector.

### **1971 to 1989 to 2023**

Eighteen years passed between the completion of the first and second plans (1971 to 1989), and approximately 35 years will have passed between the second plan and the completion of the UEA Apostolic Plan whose development we are beginning now (1988 to 2023 [projected completion date]). The long hiatus in Extraordinary Planning work can be partially attributed to the effect of the announcement that reconfiguration of the Provinces of the USA Assistancy was being seriously considered. While the archival material contains some references to reconfiguration discussions as early as 1965, informal consultation led by the Jesuit Conference and different officials in Province governance began as early as 2003. Beginning at that time, with Province reconfiguration somewhere beyond the horizon, none of the three former Provinces engaged in long-range “Extraordinary Planning” and the offerings for annual Province Gatherings have been reduced in scope over the period from 2003 to 2021.

---

<sup>2</sup> An informal organization called the Conference of Major Superiors of Jesuits (CMSJ) was the predecessor to the Jesuit Conference (JC). Discussions about a new name for the organization, modes of governance, and articles of incorporation circulate to attorneys and provincials in Fall 1971. They seem to settle on the name, Jesuit Conference, in September 1971. They incorporate legally later in 1971. Pedro Arrupe, SJ appointed Bob Mitchell, SJ as President on July 20, 1972. It is not until 1973 when you see JC instead of CMSJ in province catalogues. The Society of Jesus in the United States has collaborated in the Conference of Major Superiors of Men (CMSM) since its beginning in 1956.

## **Apostolic Planning and Collective Memory**

Jesuits who were 45 years old in 1988 are 80 years old today. In the Apostolic Planning about to begin we have lost to a great degree the experience of those Jesuits who were between 45 and 65 years old in 1988. In UEA, no Jesuit who entered the Society after 1988 has an experience of “Extraordinary Planning”. That is, a man who entered the Society in 1988 at 25 years of age, is today 55 years of age. We can affirm in general that no UEA Jesuits under 55 years-old have an experience of Extraordinary Planning.

We have a triple challenge. Firstly, three Provinces have been brought together into one. This change has brought with it some anxiety, and it happened during the pandemic. Some might ask, “Is this Apostolic Planning process simply a pretext to closing or withdrawing from apostolic works?” The designers need to take that question into account. Secondly, the collective memory of Extraordinary Apostolic Planning is associated with each of the three former Province identities. The UEA Jesuits do not have a single unified memory of Apostolic Planning, but rather, three of them. Thirdly, Father General has asked for the development of an Apostolic Plan, but this “new” Province has only a small number of Jesuits who both participated in the previous iteration of Extraordinary Apostolic Planning and are apostolically active today. Where is that collective memory? Or more precisely, “Who carries each of the three distinct collective memories of each of the three former Provinces?” A Jesuit ordained in 1989 at the age of thirty-two is today 66 years old. Therefore, the three collective memories of Extraordinary Apostolic Planning are held by Jesuits who are sixty-six and over.

## **Apostolic Planning and Renewal of the Spiritual Exercises**

The first round of Extraordinary Apostolic Planning in the 1966 to 1971 timeframe took place at the emergence of the Anglo-Saxon movement of renewal of the Spiritual Exercises. The creative foci of the movement were St. Beuno’s Jesuit Spirituality Centre in North Wales, the Ignatius Jesuit Centre in Guelph, Ontario, and the Jesuit Center for Spiritual Growth in Wernersville PA, with active participation also from Center for Religious Development and the Eastern Point Retreat Center. In stark contrast to the renewal of the Spiritual Exercises in Spain with its focus on the Spiritual Theology of the Exercises, the Anglo-Saxon renewal focused on the personal experience of the retreatant in his/her discernment about movements of spirit, and on real-time discernment in the Director as he/she guided a retreatant.

*1965-1971*

So, in the first round, Extraordinary Planning was not framed as a corporate spiritual experience. The archival material does provide evidence of a general spiritual atmospherics for the overall planning process.

1985-1989

In the Maryland Province, before our second round of Extraordinary Province Planning, Provincial James Devereux, SJ, and collaborators created a full seven-month Annotation 19 Retreat book entitled, *Place Me with Your Son*. Maryland, New England, and New York Jesuits prayed through this from October to late April, with Christmas 1985 coinciding with the beginning of the Second Week, and the third week and the beginning of the Fourth Week coinciding with Holy Week and Easter in the Spring of 1986. Each Jesuit made his own Annotation 19 retreat before beginning Province Planning. It was probably assumed that this experience of the full Spiritual Exercises in Daily Life would prepare the Jesuits for the Planning work ahead, even though there were no references to that Planning in the Devereux retreat manual. With this second Extraordinary Planning process, we see that the Province leadership in Maryland, New England and New York led the Jesuits through an Annotation 19 Retreat that served as the spiritual “antechamber” to the planning process itself in the hopes that it would contribute to the creation of minds and hearts open and well-disposed to listen for the promptings of the Holy Spirit.

2021-2023

In the last 35 years, we have seen the development of an array of specialized practices drawn from the Spiritual Exercises, and that are offspring of the dynamic Anglo-Saxon renewal of the Spiritual Exercises. One of those areas of specialization has been the discernment of spirits. We have seen an intense focus on methods of personal discernment, and in recent years on communal discernment. At the beginning, in the mid-1960s, personal discernment would, with some frequency, be included as part of the dynamic of a personally directed annual retreat, which were just beginning at that time. It would be geared toward a decision on a matter of greater or lesser importance, and not necessarily a decision about a choice of future ministry of the retreatant, but on any matter that could bring a reprioritization in an area of the life of the retreatant. In addition, the disciplined practice of Ignatian discernment of spirits found its way into the practice of ongoing spiritual direction with a double focus: discernment in the director and guiding decision-making for the retreatant. Now comes another specialized spinoff of the Spiritual Exercises that will prove to be crucial for UEA Apostolic Planning. We will now turn to that practice.

For our purposes here, the specialized practice is communal discernment. The first iteration of *Ignatian Spiritual Exercises for the Corporate Person* appeared in 1977. George Schemel, SJ and collaborators had guided a process of renewal of the Spiritual Exercises at Center for Spiritual Growth in Wernersville, PA, and now, the second burst of creative energy was directed toward the development of Spiritual Exercises for Communal Apostolic Discernment. Schemel and his team enriched the practice of the Spiritual Exercises by considering groups in the same way as they did individuals, listening to the Holy Spirit and making decisions together. They founded Ignatian Spiritual Exercises for the Corporate Person, or ISECP, but the organization never prospered. It has since been rediscovered by an organization, *Exercices Spirituels pour un Discernement Apostolique en Commun* (ESDAC), in Louvain-La-Neuve, Belgium, and by the Canadian Province of the Society of Jesus. Sr. Laurence Loubières, provincial assistant for discernment in common,

helped lead the process of communal apostolic planning for the Province of Canada that produced their Apostolic Plan, "Pilgrims Together." The Province has since created and sponsored a "Service for Discernment in Common" in Toronto where Sr. Laurence Loubières is the Director. The USA East Province has consulted with that service of the Province of Canada in the design of our communal apostolic discernment

### *Conclusion*

In the first instance of Extraordinary Apostolic Planning (1965-1971), we observed an overall spiritual framework to the Planning Process. In the second instance (1985-1989), we see the full Spiritual Exercises as the antechamber of the Planning process in the hope that, because of the nature of the Spiritual Exercises, they would create an overall positive disposition in each Jesuit. Today, as UEA begins, it will be using the specialized practice derived from the Spiritual Exercises known as Communal Apostolic Discernment. The method will be the Canadian model of spiritual conversation. This conversational practice, derived from the Spiritual Exercises, will be a valuable tool in this third instance of Extraordinary Planning since Vatican II.

January 2022