

Retreat with Trustees – Racine, WI – Oct. 12, 2019  
**The Ties That Bind Jesuit and University in Trust**  
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Good morning!

First, as a member of the Board of the Jesuit Conference, let me express my thanks for your attendance here at this pilot gathering. It is a blessing to have you here. More to the point, though, thank you for your service as trustees. It is an often unsung role that you have, one that in challenging times can bring many headaches, yet without your guiding hand, our universities would be by far the poorer, less able to meet the challenges of a rapidly changing world.

And rapidly changing it is indeed! It's been only 50 years since the first lay trustees joined the Boards of Jesuit universities in the U.S. At that time, who would have ever imagined the world of Jesuit higher education today? Many Jesuits and lay partners are still stunned by the reality that now a majority of the Presidents of our universities are lay women and men, a dramatic shift. The number of Jesuits present in our universities continues to decline and some of our schools are facing the real possibility that there will soon be no Jesuits on campus, certainly not teaching Jesuits. What does that mean for the future?

At the same time, the world of higher education continues to shift in notable ways. Who would have ever thought that we would live in a context where going to university, receiving a college degree, might be considered a problem, not a goal to be attained? Pres. Jack DiGioia of Georgetown at a recent panel made clear the emerging rhetoric in our country that a university degree is often a waste of time and of money, just leaving people with crushing debt. That flies in the face of the facts, of course, but nonetheless the reality of such rhetoric forms a background to much of our contemporary debates. The image of students stuck with debt is a real one, but that often conflates undergraduate and graduate / professional debt, or for that matter the debt often accrued in for-profit institutions. One needs only watch the discussions in the current presidential campaign to realize how powerful an issue that is.

Not surprisingly, of course, that kind of rhetoric has a secondary effect. We used to assume that our universities would have robust faculties of arts and sciences and that most undergrads would be pursuing degrees in traditional fields like history, English, sociology, and the like. Of course, some still do, and yet we experience the shift toward a 'professionalization' of undergraduate education, in some ways closer to the European model but without the intensive '6<sup>th</sup> form' or 'gymnasium' core education that usually proceeds matriculation in a university.

As I look at the schools in my own Province, I see a growing attempt to 'right-size' faculties and departments, focusing increasingly on meeting demands in healthcare, engineering, and business, among others. The debate rages about why students – and faculty – should 'waste time' on 'soft disciplines' like philosophy, theology, literature, history, when they could profit so much more from more 'time on task' with the courses that will actually be remunerative in the long run. How many tenured faculty does one need in theology or religious studies? Given the rapid shifts in the desires of students, does tenure make sense anymore, locking in faculties to

long term contracts and leading to less flexibility for administrations? So many schools face 'core curriculum wars' as they try to determine new ways of providing a liberal arts foundation that prepares students for the future, something employers seem to desire.

With these issues goes a necessary corollary in most of our schools, namely the financial challenge of private higher education. Apart from a few schools with large endowments and deep pockets, budgetary considerations are front and center in most Jesuit schools, in part to deal with demographic challenges, in part linked to the right-sizing process. That process of either budgetary constraint – sometime over several years – or actual decrease in budget allocations has a direct impact upon the morale of faculty members and others. What will become of 'our school'? I have seen in many spaces a concern for the very existence of the school into the future. I do not envy administrators who have to balance budgetary considerations of such magnitude with the need to provide a positive and hopeful vision of the future. Yet, that is often the reality we face. Where does one cut? Where does one invest? What does one create for the future? Our schools are not facing the depth of challenge that Wheeling Jesuit did but that challenges are real. One sees some of our schools in competition with one another, so that the discount rate, that once made me pause when I'd see middle 50s now at times, approaches middle 70s.

And yet, it's easy to paint a bleak context, and I do not want to do so. Anyone who meets our graduates cannot but be impressed by the impact that our schools have on young men and women. Moreover, so many of our schools have a major impact, whether regionally or nationally, often helping to set the tone of conversation on important issues. Frequently our schools are drivers of renewal in the areas they serve, areas once prosperous and perhaps more recently facing tough times. The deliberate decision of so many of our schools to remain in difficult locations when they could have moved to the suburbs often has been an important beacon of hope. We have so many important resources upon which to build, not to mention yet the corps of alumni who continue to have such an impact on our world. Some of our schools – Georgetown, Regis, Gonzaga – have provided tertiary education in refugee camps in Africa and Asia, bringing hope to those who have been violently dispossessed. Yes, we have much to consider.

Within that mix of challenge and hope, you serve as Trustees. Father General in his letter to you touches profoundly on the important role you have, stewards of a community of learning and formation. He rightly echoes his predecessor, Father Nicolás, who expressed great gratitude and admiration for your role in our universities in such a time of change. Both of them speak eloquently of the way in which you exercise care for the present and future of schools that we value highly. I can only add the thanks of my fellow Provincials.

In my engagement with Trustees, however, what I have often found is a reticence to think about that broader perspective of responsibility and care. That is not surprising. Often you have been chosen for the practical gifts you bring to the university. You are lawyers, educators, persons well versed in finance, shapers of discourse in your local communities. You are often alumni who give generously to the university and who help reach out to your peers to elicit greater commitment. You are women and men with multiple commitments who give yourself generously to the work of the university.

Yet, you meet perhaps three or four times a year, other than those on the Executive Committee. You come well prepared but burdened by a mass of information you have received.

You work on committees of the Board, tasked with specific aims, like the Student Life or Academic Affairs Committees. You rely upon the information given to you by the Administration, and your role is not to manage but to serve as stewards, those who hold the future of the university, its particular identity and mission in trust. You are in some ways likewise elders who guide and oversee. Rightly there is a difference between the Board and the President as the Director of the Work, she or he who is tasked with governing and leading.

For the Society of Jesus, though, you as members of the Board have a very particular task, to help ensure the ties that bind the university to the Society of Jesus, to ensure that it is truly Jesuit and Catholic. It is important to consider what that means. Too often in our discourse, that identity as Jesuit is seen as a historical reality, something that has been and that one wishes to preserve. While true, it misses the heart of Fr. Sosa's challenge, namely that identity and mission are dynamic and fluid. They either grow or decay; there is no third option. The possibility of growth is linked directly to the ability to shape the mission of the university, forging its future in the light of the mission of the Society and the Church. Being Jesuit is not simply 'having excellent education' or having a fine campus ministry or a good theology department. 'Jesuit' must touch upon the whole of the University's way of being and shaping its future. As you read Fr. Sosa's letter, it's clear that he has a vision of what a Jesuit University can be and the impact it can have on our world. Such a vision cannot be taken lightly, nor does it come into being accidentally.

It falls then to you as trustees to ensure the vitality and power of the Jesuit mission in the University. I use those terms deliberately. We can think of the university as an object with which to deal or an organization with a complex structure. Both of those speak to part of the reality. Behind the General's vision, however, lies a sense of a university as a quasi-personal reality, having character, conscience and decision-making ability. We speak of universities as having 'identities' and they do indeed. In our descriptions of universities, we often ascribe personal designations. We all know of *Alma Mater*. There is a wisdom in that. The interpersonal reality of the university and the quasi-personal character of the university as a whole demand a very different kind of reflection, like that for a family.

If we're talking about the University as Jesuit, then, we're aiming at a character that is hard to define but easy to recognize. It does not apply merely to some subset of attributes like the campus ministry or the theology department or the presence of some members of the Jesuit community. One can find that at other schools; I met the Society of Jesus at a thoroughly secular university that had a Jesuit community, a campus ministry run by a diocese, and an excellent religious studies department. The danger is that we can compartmentalize the designation 'Jesuit' to attributes that ultimately do not touch the whole. What Fr. Sosa points out, Jesuit universities are meant to be porous, building a community of vision and purpose, open beyond itself to the broader world. Vision is meant to be expansive and creative of a university as a community, and as a core of a broader community. We don't often think of universities that way.

I'd like to go back to two challenges I raised earlier and one that is an important inflection point in the life of a University, to suggest a different way of proceeding for a Board, one very different from a functional pattern. First, think of the way in which Fr. Sosa – and the Society of Jesus given a mission from Pope Francis – asks you to consider a matter like strategic planning. At the core of such a process is always some vision of the future and a way to navigate it. The General makes the following request:

*Jesuit universities are called to be agents of social and spiritual transformation. We are called to enter fully into the lives of those whose dignity has been stripped away by poverty, racism, displacement, xenophobia and other dehumanizing forces. A university that sees itself as a venture aimed at transforming society will gravitate toward the margins of society...Such a university will throw open its doors and windows to the people at the margins, who in turn bring with them a new breath of life that will be source of life in abundance for all. (p. 2)*

As he says, the point is not the glory of the university and even less its survival, but rather a broader sense of a vision that can unify and create. As a framework for any practical decision-making or allocation of resources, he suggests that the university's character and disposition should provide the context for all that comes next. The very process of framing such a process of shaping the future itself flows from and reinforces that character and disposition.

As Trustees who have a privileged access to a broad experience of the world and who yourselves are people of vision, you occupy a special space within a university to call the community to be who it truly is. I am not saying that you have to do this 'vision piece' by yourself, but the way in which you as a group make clear your desires about the process can help move a school beyond the inertia that can sometimes put the focus on the university and its 'product' rather than its transformative mission. That does change the role of Trustee from passive agent to a creative person, but the Society trusts that you can engage this process much better than Jesuits alone, especially if you do so in dialogue with other Jesuit schools in Canada and the U.S. and beyond this continent. If a University is to be Jesuit, living out that vision, expounded in the Universal Apostolic Preferences that Fr. Sosa mentions, has to be at the heart of deliberations.

Similarly, I want to return to a question I mentioned earlier. How does a school respond to the discourse that a university education today is a waste of time and money, and probably an exercise in indoctrination? The response can be tepid, as I noted. We can focus on better financial outcomes through focus on professional education with a reduction on the frills so that one can do the degree more quickly, perhaps with lower cost and with maximum payback upon graduation. Much of the advertising from schools – including ours – tends to move in that direction.

What if, however, a Board were to take seriously Fr. Sosa's invitation to see education as formative and transformative, of persons, communities, and cultures? It may sound decidedly old-fashioned, but what if the formation of global citizens, able to take up responsibilities in the world is at the core of the programs and colleges of our schools? I've been around long enough to know that 'curriculum wars' can be bloody battles for turf, as each department or faculty seeks a maximum number of courses to ensure long-term viability and sustainability. How many bodies do we need in our courses to ensure that we can keep the faculty we have? Of course, there are always overarching principles at play and those are important, but it can easily move into a fight to have as few 'soft courses' extraneous to the real meat of a student's program as possible.

Jesuit high schools have together focused on what is called the 'grad at grad', hallmarks one hopes to develop in all students of Jesuit secondary education institutions across Canada and the U.S. While the specifics of programs may differ among institutions, the desired personal transformation provides a context for the deliberations that follow. That 'grad at grad' was hammered out in collaboration among schools over years and has proven resilient. While it

needs constant updating, the new 'Benchmarks and Standards' document for secondary education takes it as a basis for reflection and for continued sponsorship.

Can you imagine yourselves – indeed the Board as a whole – inviting the university community to come to a consensus of the transformation one seeks to nurture, a transformation that can shape subsequent discussions of core curricula? In some ways, we already do that in recognizing students who incarnate the hopes we have, and we tailor service-learning opportunities, spiritual options, and interdisciplinary structures in hopes of fostering such persons. As members of a Board of Trustees, how might you be able to foster such an attention to vision and transformation as yourselves a community of values?

Last, though, I mention perhaps one of the most important – and difficult – of discussions, namely choosing a President for the University. We now have a lay women and men as a majority of Presidents of Jesuit institutions. They are a great grace to us. As Father Sosa mentioned, we are realizing more and more that the growth in the number of lay leaders is *not* simply the result of a lack of Jesuits but one of the 'signs of the times', a particular grace that allows us to imagine what real collaboration can be. I am blessed with having three lay Presidents in my Province all of whom have had to steer schools through challenging times.

Yet, how does a Board go about the process of seeking a President? If a President is one who is to do the ordinary role of governing in the light of the mission of the Society of Jesus, given to us in the Church, how critical to the Board is the awareness of and commitment to the mission and vision of the Society of Jesus in choosing a new President? In a sense, we all know the 'other criteria' that a President needs – fiscal acumen, ability to lead and shape a team, ability to foster relations with donors, academic credibility, years of experience in leadership, and on and on. When one looks at many of the Presidents in higher education today, the dominant skill set is often shaped by a J.D. or an M.B.A., both of which are in fact very useful tools. Does a Board demand of its Search Committee – and of the process – a priority focus on ability to lead the Jesuit and Catholic mission of a school? That does not mean, I will emphasize, that one looks for a Jesuit. I can think of several lay leaders who have this gift in spades. Nevertheless, how central is mission to the Board's deliberations, or is it something left to a conversation between the candidates and the Provincial so that the Board gets a green light??

I realize that these questions push a distinctively different role of a Board, but they are implicit in the trust the Society – and the Church – placed in lay leaders 50 years ago. We are at an inflection point. Do the Boards of Jesuit universities find their models in corporate Boards or the dominant models in higher education, or can they model a different, mission-driven self-understanding? We've had 50 years to get used to lay leadership, now may well be the time to consider more broadly a new future.

## **PART II**

I imagine that my considerations during the first section must leave you a bit daunted, bewildered. 'Is this what I signed up for?' After all, the role of a Trustee has often been much easier, much more circumspect – and for that matter practical. These kinds of issues of mission, becoming part of a much broader reality within a Jesuit and Catholic reality, must strike you as beyond your pay grade.

You are right to consider this as new in several ways. First, as I mentioned before, the Society of Jesus in Canada and the United States is now coming to a deeper appreciation of the implications of 'separate incorporation', the process that began 50 years ago. A Board in 1966

would likely have consisted of a Jesuit Rector-President and his canonical consultors, an in-house group with a very clear sense of what it meant to be Jesuit. There may well have been lay advisors, but their role was circumspect.

The Society opened up its universities to lay leadership not because there weren't enough Jesuits – there were still plenty – but because there was a recognition that the future of Catholic higher education required greater expertise and a vision broader than what the Society could provide on its own. As Father Sosa points out in his letter to you, we began to understand collaboration slowly but surely as a great gift of God to us, not some way to fill a gap.

Today, we are taking a next step in collaboration, even inviting lay leaders to take part in the discernment of governance in the Society. In trying to discern my successor, I invited the lay Directors of Works to submit their sense of what the needs of the Province would be in the next six years, and the consequent traits desired in a new Provincial. That is definitely a new path forward. As Father Sosa regularly says, 'Jesuits do not have collaborators; we are collaborators'.

The second piece implicit in this change is that where Boards previously turned to Jesuits to 'do discernment', as our General Congregation 36, the highest policy-making body of the Society of Jesuits requires of all Jesuit works, now we are asking all those engaged in leadership, especially are Boards, to take up that role. We recognize that we cannot ask you to become 'mini-Jesuits' nor to put in the 10 years of time it takes to become a Jesuit, but there are certain skills and practices that can be very helpful to you. All of this is part of a much broader commitment of our apostolates to formation for mission of faculty, staff, and especially Boards, since you are so central to governance. Much work has been done over decades among faculty and staff, at least in terms of helping them know the basics of what Jesuit charism and mission means. Schools are now moving into a second part to all of this, namely inviting people into the experience and practice of Jesuit spirituality so that they can not only have a knowledge about things Jesuit but an experience of this way of proceeding. In some ways, universities are much more intentional about forming people for discernment, forming them to be leaders in a Jesuit apostolate than they have ever been. No longer do they simply 'rely on Father'; the fostering of the identity and mission of an apostolate is now a common task.

I'd like to note three different aspects to this: the personal challenge you face, the changing practices on Boards as a whole, and the new set of relationships between schools and their local Jesuit communities, Provinces and Conference. Fr. McDonald, Fr. Niehoff, and Dr. Reynolds will tackle the latter, I think, much better than I.

Let me begin with personal formation. That probably touches you most directly. Discernment, that process by which one comes to understand the choice which best fosters the mission and charism of the Jesuits, is not some bizarre practice that is impossible to understand, though God knows some people make it so. It is ultimately a way in which a person comes to a sense of that path which brings greater hope, greater peace that one is working with – not against – God in a particular choice. St. Ignatius called that 'consolation', a sense of a decision 'fitting' with the way in which God is calling one or one's community. GC36 said that this practice was essential to ensure on-going apostolic planning, since it helps provide a common vision for the future.

Participating in discernment requires several things of a person, and numerous Boards through Ignatian Identity Committees or the like help foster these developments. Perhaps most important is the growth in an adult spiritual life. By the way, let me note in passing that this does

*not* imply that one has to be or become Catholic. Ignatius understood an adult faith life not merely as an ability to say some prayers or participate in certain public or common prayers. Rather, it was coming to know who God is, to have a personal relationship with God one that can touch our hearts and move them. Praying the Gospels in an imaginatively or discursive way so that one begins to see through God's eyes. That's at the heart of the Exercises, to become disciples of Jesus.

In fact, discernment can probably best be summed up as 'taking a long, loving look at reality', i.e. seeing it through God's eyes, with God's desires. We too often stick God into our world and wonder why faith doesn't make a difference. We make God 'fit' rather than asking how God desires to change the world. If you think of the UAPs, though, one can imagine it in the following way. One begins with the Ignatian spiritual tradition that opens one's eyes, heart, mind and imagination to God and calls one to freedom, not just to accept 'the normal'. From there, one can 'see' and 'hear' the poor and marginalized, and the young in new ways, not just what we usually suspect. Also, one can see 'creation' through the love God has for it, something close to St. Francis hymn to creation, i.e. not just as a thing to use. How does one place one's world into God's plan, not vice versa? There is that great line from Fr. Sosa's letter. 'You hold your Jesuit college or university in trust for the Society of Jesus, for the Church, for students, and for the Common Good – all with an eye toward those on the margins of society. I know that is not an easy task.' (p. 1) That sense of holding for something greater, holding actually in the light of faith, is at the heart of how the Society of Jesus hopes Trustees will work. We have failed, though, to call you to that in the past, to form you for this work, not as a burden but as a creative gift.

Imagine, though, how that translates into working together on a Board. Often Board meetings I have been at have mirrored what one might find anywhere, with discussion of emerging trends, financial considerations, bottom lines, personnel issues, and the like. Especially in a time like ours, so often the financial and demographic challenges can become the nub of the issue. Other questions can arise, and so many of our schools have a deep commitment to doing good to their area and to the world beyond. I think, for example, of the Jesuit Worldwide Learning network of which Regis Univ. is a part that brings education to refugee camps in so many parts of the world and that is contemplating moving toward delivering B.A. degrees that could transform lives. I am not suggesting that Board meetings or Board decisions are somehow evil or problematic. Today the Society of Jesus is asking Boards to reimagine how they function as part of the Society and the Church's mission, able to touch and transform students, faculty, the local area and beyond, and for that matter Trustees. This is the next step in the 'Land o' Lakes' decision. What does it mean for the Society to entrust Boards with the mission of the Society and the Church?

Many of your Boards have already started to do some formation work, even including occasional retreats for the Board. I know, though, that this has encountered resistance from people who don't have time for such ventures, to take a day or two off. I understand the burden that can be. Yet, while it is important to learn about the Society, its history, its mission, its role in the Church, the contemporary vision of the Society, that still leaves one in a kind of intellectual space that may very well not translate into the kind of discerning praxis that the Society so desires. Intellectual formation is an absolute prerequisite; Fr. Nicolás, our previous Superior General, made that absolutely clear. Yet, while necessary it is not a sufficient step. By the way,

we Jesuits are also going through this same redefinition as asked of us in GC36. We're learning what it means to discern in common, to begin by looking **together** through God's eyes.

The kinds of 'practices' that the General Congregation asked of us require a revision of how we work together. We often begin with a perfunctory prayer or an 'Ignatian minute' and then move to approving the agenda, the minutes, reports from committees, and so on. The General Congregation asked about the role of 'spiritual conversation', including time for vision, reflection, deep listening to one another, rooted in a sense of how God might be inviting us to view the challenges which higher education faces today. That is a movement out of passivity into a more active, imaginative, creative and discursive style of engagement, one that assumes that everyone should have a voice, not simply those with the loudest voice or the need to speak – that can happen in the Society, believe me!! Imagine inviting a group to reconsider not only **what** they discuss but **how** they discuss with space for real listening and real imagination, with time set aside for prayer, perhaps with some part of the Scriptures or Church document that speaks to the moment we face.

Let me assure you, though, that those of us in the Society are under no illusion that this will be completed by Christmas. Good Lord – we're trying to understand how to move forward with all this within the Society itself. Yet, the point is to begin a long-term process of developing habits, personally and communally, learning a new way of proceeding that will be jarring. It assumes that gradually as new people are proposed for the Board and invited to join, their willingness to share in this process and to grow in it will be taken for granted. Moreover, as a Board develops different habits – and therefore different ways of making decisions – it can create a 'culture' of predispositions that helps initiate new members, not simply by some on-boarding but by the regular pattern of behavior.

In a sense, we already do that. We are extraordinarily good at recognizing what 'expected behavior' looks like and fitting in. What might that behavior look like in the future? Again, remember I'm talking about a work that may – probably will – take decades to accomplish, but consider what a Board of the future might look like and how it might be better able to shape a University that is not only in what it does but in how it 'reflects' recognizably and palpably different from the top down.

As I mentioned, the changes we are discussing requires of us a very real change in how we proceed and that requires of us new resources that will be greater than any one institution can develop, and that includes the Society of Jesus. We are exploring new territory. With that in mind, I ask you – and other members of the Board and our Presidents – to support far greater collaboration within the Association of Jesuit Colleges and Universities. Many schools are being very creative but we need all schools to be involved in a collaborative way; that is part of the networking to which the General Congregation called all of us. Also, your Provinces are all recognizing the need for deeper spiritual and intellectual depth across our apostolates – and in the Society – and are developing strategies for responding. Trustees and Administrators in all our apostolates need to move beyond the 'silo mentality' (we'll do it our way) if the kind of robust creativity in formation and governance we need can move forward.

Again, though, let me thank you for all you do. You have taken up your duties at a time of great and momentous change. We in the Society are immensely grateful for your work and your willingness to shape our ministries in your universities in uncharted waters. Be assured of our prayers and even more of our willingness to work with you in the future.