EXECUTIVE SUMMARY

MANDATE
In "Responding to the Call of Christ" the Jesuit Conference Board noted the need for a systematic, collaborative approach for understanding the cultural context for evangelization; and asked the Jesuit Conference to provide practical resources for comprehending this context in relation to Jesuit ministries and decision-making.

IMPLEMENTATION
For the last year, the Jesuit Conference staff with assistance from a national Advisory Group, have been creating processes and structures for Jesuit and colleagues to reflect together on common challenges in ministry, to discern together where God is leading us in particular ministries, to discuss emerging needs and trends facing populations of concern, as well as to share resources, best practices, key research and effective models of service. This brings together in a more effective way the many resources already present in Jesuit ministries— including scholars from varying disciplines, ministry practitioners and community organizers.

The Advisory Group and Jesuit Conference staff have engaged in a national survey of scholars and ministry practitioners from Jesuit institutions and ministries to identify human resources within the Society who can serve as potential consultants and collaborators on issues of concern. This data is being compiled with data submitted by the provincial social ministry assistants into a national internet-accessible database. The group is also researching and piloting use of new technology to aid in collaboration and knowledge-sharing. The Advisory Group is currently engaged in a pilot study on “solidarity with inner-city populations” to test the possibilities of this kind of consultation. Findings and recommended next steps from the initial phase of the pilot consultation are included in the subsequent report (JC Board Book Section 11C).

RESULTS AND RECOMMENDATIONS
1. The work thus far shows there is a strong interest among many scholars and practitioners in Jesuit ministries in working together both to assist the Society in its apostolic decision-making, and in learning from each other regarding the social-cultural ministries in which they are engaged. We recommend that the process of building the communication links and consultative groups on social issues be continued.
2. The results of the initial phase of the pilot consultation process have shown us that the social-cultural analysis can provide relevant and contemporary information that we hope the Provincials, individually and as the JC Board, find helpful in their apostolic planning and ministerial choices. We ask the Provincials to provide us feedback regarding this effort and that they inform us regarding the issues and focus that they find most helpful.

3. Furthermore, it has shown us that this effort directly serves Jesuits and their collaborators in Jesuit institutions and ministries by providing a structured forum from which can emerge more effective social analysis as well as collaboration across provinces, institutions, and disciplines towards the overall betterment of those whom we serve.

4. While the development phase of this initiative is steep, we observe that these processes make it easier not only to share-knowledge and resources throughout the Assistancy, but also to address mutual challenges in society and in ministry in a collaborative way. It seems clear that once this development stage is in place; there is no reason why a number of issues could not be addressed by various groups working simultaneously.

5. We recommend that studying the ministerial implications of commitment to solidarity with populations in need (as outlined in the Meditation) be one of the ongoing projects within this initiative -- as already begun with the work on inner-city populations.

6. In particular, we recommend that the consultation regarding the ministerial implications of “solidarity with inner-city populations” be continued.
SOCIAL-CULTURAL ANALYSIS INITIATIVE

REPORT

1) INTRODUCTION

a) Task given by provincials from July 2007 meeting: The JC board tasked the JC Conference staff with developing an on-going, common and collaborative process which engages the institutions and ministries of the Society in developing “resources for understanding the cultural context of evangelization.” This includes the commitment to solidarity with those most in need as well as those most capable of addressing those needs.

i) JC Conference staff has appointed an Advisory group which has helped to developing methodology and framework for this social-cultural analysis initiative and has begun a pilot consultation on “inner-city populations.”

ii) As part of this report for the May 2008 JC Board meeting, we will present our findings and reflections on the methodology being employed in this initiative, action steps we have taken in the implementation of the initiative, our recommendations for the direction of this effort as it proceeds forward, and initial findings of our first pilot consultation.

b) Advisory Group:

i) Membership

(1) Ted Arroyo, S.J.- Executive Director, “Jesuit Social Research Institute” at Loyola University, New Orleans, LA
(2) John Baumann, S.J.- Executive Director, Pacific Institute for Community Organizing, Oakland, CA
(3) Ray Bucko, S.J.- – Director, Native American Studies Department & Chair of the Department of Anthropology and Sociology at Creighton University, NE
(4) Julia Dowd - Associate Director, the Lane Center for Catholic Thought at the University of San Francisco, CA
(5) Tom Gaunt, S.J. - Socius, Jesuit Conference USA, Washington, DC
(6) Betsy Linehan, RSM – Associate Professor of Philosophy, St. Joseph’s University, PA St. Joseph’s University
(7) Jim Stormes, S.J.- Secretary, Social and International Ministries – Jesuit Conference USA, Washington DC
(8) Bill Rickle, S.J.- Assistant for Latino Ministries, Maryland Province of Jesuits & Director, Institute on Migration, Culture and Ministry Loyola College, Baltimore, MD
(9) Phil Rossi, S.J.- Associate Dean for Graduate Affairs, & Professor of Theology, specializing in Christian Ethics, Marquette University, Milwaukee, WI
ii) Jesuit Conference staff facilitator
(1) Amy Newlon-Coordinator for Research, Social and International Ministries – Jesuit Conference USA, Washington, DC

iii) Meeting Dates:
(1) January 25, 2008
(2) February 29, 2008
(3) March 14, 2008
(4) Individual consultations the week of March 24-28
(5) April 18, 2008
(6) May 8, 2008

c) Historic Context for the Importance of the Task
i) The driving question behind the Strategic Discernment process was articulated by Father Kolvenbach: “What are the needs of the people of God?” This initiative hopes to make a contribution to the “answering” of that question.

ii) Jesuit identity is grounded in radical apostolic availability as “servants of Christ’s mission.” From the beginning of the Strategic Discernment process, it has been asserted that “one of the demands of that availability is that we open ourselves to and prepare for the future by discerning the ‘signs of the times’ and the call of God’s spirit.” (Letter from the Jesuit Provincials on the Need for a Strategic Discernment Process, December, 2004). This social-cultural analysis initiative at its core seeks to help in this discernment in relationship to our ministries.

iii) At the Scottsdale retreat and August of 2005, the Provincials reflected upon the charism of the Society and its ministries, and highlighted the importance of defining “who are we called to serve?” and “who are the companions and multipliers in this process?” To assist their reflection, the Provincials’ asked for “briefings” on the social cultural context. The structures and processes of the social-cultural analysis initiative are designed to provide ongoing “briefings” and input to assist in the ongoing effort to respond to these questions.

iv) The October 2005 document on Assistancy-wide apostolic priorities highlights the importance of social analysis -- particularly relating to the poor and marginalized in the U.S. and worldwide -- and recommends developing “ongoing processes” for social, economic, political and cultural analysis and theological and philosophic reflections” which would shape the activities of Jesuit institutions.

v) In November 2005, to provide the JC Board with recommended implementation steps for the Assistancy-wide apostolic priorities, the Ministries Commission highlighted
the need to establish a “process of organizational learning across the Assistancy” which “utilizes existing resources for analysis and cultivates new directions.” The JC Board concurred at the November meeting in Barcelona that in order to provide effective social and cultural analysis, we didn’t need to reinvent the wheel and establish a “new think tank” we needed a process to network and leverage what we have in our institutional relationships.

vi) Between February and May of 2007, staff and provincials working on the Strategic Discernment documents developed a framework for a three-stage process of ministerial decision-making which includes “reading the signs of the times” through an “on-going and participatory process” as a core element.

vii) Hence, the major documents arising from the Provincials strategic discernment process reflect the overall importance given to social-cultural analysis in the new way of proceeding for our mission today.

(1) The Meditation on our Response to the Call of Christ, highlights the question “Are there people in the world through whom Christ is calling out to us most urgently?” and has led to the double focus on both those most in need as well as those of us best able to respond to those needs.

(2) Responding to the Call of Christ calls upon the Jesuit Conference to help provide the Provincials with a “practical resources to better understand and influence how social, economic, cultural and governmental structures serve the cause of human dignity” utilizing existing networks of scholars and practitioners. The processes and mechanisms of this initiative are designed to accomplish this.

d) Initial Provincial Framework for the Task
i) Reflecting Upon the “Signs of the Times” is part of the three-stage cycle found in the framework for Ministerial Decision Making (see Responding to the Call of Christ: Ministries).

ii) The Jesuit Conference will provide Provincials with practical resources for collaborative social analysis and theological reflection on our changing realities. This framework for this is outlined as follows in the Ministries Section of Responding to the Call of Christ:

(1) This effort will be coordinated by a Research Coordinator for the Jesuit Conference/ Social and international ministries office.

(2) To do this effectively, the Jesuit Conference staff needs to engage and promote collaboration among “existing networks of the Holy See and Church leadership, leaders of the Society and its ministries, Jesuit universities and other centers of our intellectual apostolate; practitioners in Jesuit works, ‘think-tanks,’ social
centers and individual scholars, Jesuit and lay partners and communities and individuals served.”

(3) Questions and issues for research will emerge from the Church, the experiences of our ministries, changing social trends, and specific questions raised by the provincial leadership.

(4) The results of this effort will be presented to the Provincials on a regular basis and shared by them with provinces and institutions and their respective planning bodies.

2) Research and Preparation

a) Conducted survey on expertise of scholars and ministry practitioners within Jesuit institutions.
   i) Received surveys from over 50 Jesuits and colleagues and incorporated this information into the on-going development of national internet-accessible database describing core competencies of Jesuit institutions, ministries, scholars and practitioners in disciplines related to social and international ministries and issues.

b) Engaged in outreach efforts to social researchers in Jesuit colleges and universities regarding the importance of social research in social ministry efforts and the opportunities and challenges presented in promoting collaboration between the two.
   i) Promoted reflection among social researchers at Jesuit Colleges and Universities on document: The Importance of Social Research (produced by the Jesuit Social Ministry Secretariat in Rome following the meeting of the Social Ministry Assistants in May 2007).
   ii) Initiated a listserv to assist in reflection, collaboration and information sharing among social researchers interested in collaboration with social ministries.
   iii) Currently planning ways to use the June 2008 Social Ministries Gathering in Denver as an opportunity to continue dialogue on “effective means for collaboration between scholars and ministry practitioners”

c) Appointed a national advisory group to assist the Jesuit Conference in development of processes, structures and mechanisms for accomplishing the stated tasks of the social-cultural analysis initiative.

d) Conducted research on/ piloted new technology to enhance the collaborative efforts of the social-analysis initiative:
   i) Began a listserv for social researchers (see “2b” above).
   ii) Employed use of an internet-accessible “shared workspace server” for Advisory Group members to share documents, conduct on-line meetings, engage in on-line discussions, post useful links, and share bibliographic resources.
iii) Researched wiki-technology available for future efforts and began initial dialogues with potential software architects to acquire technology for the purposes of the social-cultural analysis initiative.

e) Conducted pilot consultation on inner-city population (research, preparation for the first implementation of the social-cultural analysis initiative are enclosed in the subsequent report – JC Board Book Report 11C).

3) Proposed Program for Conducting Social-Cultural Analysis Across the U.S. Assistancy

a) Purpose and Goal
   i) Help Provincials and institutions/ ministries of the Society reflect on ways to be in greater solidarity with the poor and marginalized as grounded in the Society’s “commitment to choose poverty, dishonor, and humble service of the least among us” (Meditation, no. 28) in collaboration with those most capable of serving needs.

b) Content
   i) The content of the program will be guided by the apostolic choices which flow from the renewed mission of the Society of Jesus in the United States. The Meditation identifies several priority of concern as viewed from the Society’s response to Christ’s call to serve the least of our brothers and sisters. We have chosen to begin the national social-cultural analysis efforts by addressing the groups identified as being “most in need of our solidarity” in the Meditation: “inner-city populations, indigenous people, forced migrants and the globally destitute” with a commitment towards drawing in “all those with whom we work and those we serve into union with one another.” The subject of the pilot is “inner-city populations.”

c) Methodology for Study and Consultation
   i) Stage 1 (Initial Consultations & Findings)
      (1) Determine a particular focus area:
         (a) using the Meditation as a guide; or
         (b) arising from:
            (i) needs expressed from the Provincials, or
            (ii) from on-going processes of the social analysis initiative.
      (2) Conference staff engages a consultative group of scholars, ministry practitioners and community organizers from Jesuit institutions and ministries who have both an understanding and appreciation of the Society’s mission and expertise in the subject matter.
      (3) This consultative group then develops a “portrait” of the needs of the focus population and current response of the Society of Jesus in relation to those needs.
(a) The portrait identifies major needs, issues and trends affecting people the focus population.
(b) It delineates Jesuit ministries whose primary focus is to serve these needs and address these issues.
(c) From the portrait, the consultative group extrapolates “who” are the subgroups within the focus population who are primarily served by Jesuit ministries; “what” are the primary ways that Jesuit ministries serve (sub-focus areas/ issues of concern); and “where” are services primarily located (geographic and demographic factors).

4) The consultative group subsequently provides reflection and analysis on the “portrait” focusing on the intersection between need and response.
(a) Reflection on Opportunities and Threats
   (i) The consultative group considers the opportunities in the current environment that the Society could respectively take advantage of in its service to the focus populations.
   (ii) The group considers threats on the horizon to the focus population which the Society should seek to address in its planning, thinking and ministerial directions.

(b) Reflection on Best Practices and Areas of Challenge which Require New Thinking, Research/ Follow-Up
   (i) The consultative group works to identify some of the best practices and successes of the Society in serving the needs of the focus population.
   (ii) The group seeks to identify primary areas for concern with an eye towards thinking of innovative ways that the Society can enhance efforts or contribute something new in ways which are:
      1. effective
      2. unique (something that others are not doing)
      3. within the mission and charism of the Society.
   (iii) The group would look at what collaborations might be possible to multiply the effect and make the most use of existing resources.

5) The consultative group helps the Jesuit Conference staff to develop a list of key experts (academic and ministry practitioners) for future consultation, collaboration and research efforts.

6) The consultative group helps the Jesuit Conference staff to initiate a shared repository of information resources pertinent to the focus area of concern (including a “shared bibliography,” a list of relevant websites, etc.).

7) Upon completion of Stage 1 (building portrait of needs/ response, reflection, developing list of collaborators, initiate shared bibliography) the consultative group identifies primary issues and recommended follow-up actions* for presentation to the Provincials.
(a) The group would delineate:
   (i) Primary issues
   (ii) Recommended follow-up*
   (iii) Potential collaborators for each follow-up area
(b) The group would seek the Provincials’ input, direction and approval to move forward in the recommended follow-up areas. *
   (i) *The recommendations are not necessarily specific requests of the Provincials to take action themselves on various items. Follow-up would consist of recommendations for future collaboration, planning and action among representatives of the ministries and institutions of the Society. In many cases, the group would be looking for the affirmation of the Provincials on the general course of action, but would not necessarily be requesting specific actions on the part of Provincials.

ii) **Stage 2 (Collaborations in Priority Sub-Focus Areas)**
   (1) The Jesuit Conference staff engages additional consultative groups as necessary to move forward on key issues and recommended follow-up actions outlined in Stage 1.
      (a) For example, an initial consultation on “inner-city populations” in Stage 1 may yield follow-up consultations on “community-organizing and partnerships for empowerment,” “enhanced spiritual outreach to inner-city poor,” and “new collaborations in education of inner-city youth.”
   (2) Part of that follow-up may include the recommendation to pursue additional research in key areas.
      (a) For example, an initial consultation on “inner-city populations” may lead to some research and resource gathering to try and better understand the effects on the urban poor of dramatic price increases on the cost of the basic goods package – (food, utilities and transportation).
   (3) An enhanced portrait of the context of our ministries – incorporating the additional consultations and research on key issues would then be presented at the subsequent JC Board meeting and at the biannual meetings of the Jesuit Commission on Social and International Ministries (JCSIM), which includes the social and international ministry assistants from each Province.
   (4) Issues for future research, consultation, reflection and analysis related to any chosen focus area will be generated by engaging the Provincials and the institutions and ministries of the Society in an on-going process of assessing our experience, leading to a reflection on the current context in which our experience takes place, leading to decision and then to action and then through the cycle again.
iii)  **Stage 3 (Disseminating Information and Soliciting Input more Widely)**

1. The Jesuit Conference will use leverage technology to increase collaborations on issues raised in Stages 1 & 2.
   a. For example, an on-line forum on “inner-city populations” could serve as the primary hub for various on-line communities and affinity groups (including those interested in homeless issues, education, spiritual needs of the poor, and community organizing, etc.).
   b. Internet-based technology (including message boards, wiki-forums, and on-line meetings) will be used to solicit even wider input and knowledge-sharing throughout the Society.
2. The Jesuit Conference will also use its outreach functions to disseminate learning and solicit new input – including our participation in workshops and conferences, board meetings of various Ignatian organizations, our visits to ministries and institutions of the Society, as well as by issuing journal articles on issues being contemplated as part of the social analysis initiative, etc.
3. The process is envisioned to be cyclical. Pertinent information gathered in Stage 3 will be incorporated in the national consultations, planning and regular presentations to Provincials as detailed in Stages 1&2.

iv)  **Stage 4 (Evaluation & Impact Analysis)**

1. The Conference will take steps to conduct *impact analysis* on the effects of the initiative on focus populations and outcomes in ministry within the overall framework for ministerial decisions and actions.

**d) Intended Use of Knowledge Generated & Expected Outcomes**

i) The Provincials will be served in their apostolic planning by having an enhanced understanding of relevant and contemporary circumstances and issues affecting a priority population in need of solidarity. They will gain a greater appreciation of the kinds of efforts happening throughout the entire Assistancy to address these issues, including best practices and models which could be helpful in their own ministerial decision-making.

ii) The initiative will assist the provincial Social Ministry Commissions by providing them with a nation-wide contemporary analysis on issues affecting their own populations of concern and practical ideas, models and best practices as to how others from throughout the U.S. Assistancy are addressing these pressing issues. It will offer them some ideas for collaborations and partnerships which could make a real impact on the Society’s ability to address pressing social concerns. The Social Ministry Commissions would then be able to interpret the information according to
their own local reality and incorporate these ideas and recommendations into their
own strategic planning and action as appropriate.

(1) The recent meeting of the Jesuit Social and International Ministries Commission
(JCSIM) in Baltimore, the Provincial Social and International Ministry Assistants
indicated that the Social Ministry Commissions each province would benefit in
their own planning from the information, analysis and recommendations from this
cross-provincial process. They are interested in collaborating in this work,
helping to make the connections from national to local and back again.

iii) The institutions and ministries of the Society will benefit by an increased networking
capabilities providing them a forum to share knowledge, resources, learning and best
practices. This in turn will promote an enhanced capacity of our Institutions and
ministries to collaborate and take mutual action in service of and solidarity with the
poor and marginalized.

(1) Consultations with members of the Advisory Group and outreach to social
researchers and ministers to-date demonstrate a tremendous and hopeful
enthusiasm for enhancing our collaborations to better serve those most in need of
our solidarity. There is much energy around this.

iv) This enhanced network and technological forums (on-line database, information
sharing boards) will make it easier for Provincials or anyone within the Society to tap
into the vast experience, learning, and human resources within the ministries and
institutions of the Society when research needs arise.

v) The learning and recommendations that arise from the process will augment the
advocacy, outreach and education work of the Secretariat for Social and International
Ministries (SIM) of the Jesuit Conference.

4) Implementation of this Initiative: RESULTS and RECOMMENDATIONS

a) The work thus far shows there is a strong interest among many scholars and practitioners
in Jesuit ministries in working together both to assist the Society in its apostolic decision-
making, and in learning from each other regarding the social cultural ministries in which
they are engaged. We recommend that the process of building the communication links
and consultative groups on social issues be continued.

b) The results of the initial phase of the pilot consultation process have shown us that the
social-cultural analysis can provide relevant and contemporary information that we hope
the Provincials -- individually and as the JC Board -- find helpful in their apostolic
planning and ministerial choices. We ask the Provincials feedback regarding this effort and that they inform us regarding the issues and focus that they might find most helpful.

c) Furthermore, it has shown us that this effort directly serves Jesuits and their collaborators in Jesuit institutions and ministries by providing a structured forum from which can emerge more effective social analysis as well as collaboration across provinces, institutions, and disciplines towards the overall betterment of those whom we serve. While the development phase of this initiative is steep, we observe that these processes make it easier not only to share-knowledge and resources throughout the Assistancy, but also to address mutual challenges in society and in ministry in a collaborative way. It seems clear that once this development stage is in place; there is no reason why a number of issues could not be addressed by various groups working simultaneously.

d) We recommend that studying the ministerial implications of commitment to solidarity with populations in need (as outlined in the “Meditation”) be one of the ongoing projects within this initiative -- as already begun with the work on inner-city populations.

e) In particular, we recommend that the consultation regarding the ministerial implications of “solidarity with inner city populations” be continued.

f) In October 2008, the staff and Advisory Group will recommend any modifications to the methodology to be used as the overall initiative moves forward and takes on new topics of study, consultation and analysis. We will present to the JC Board some options for starting a second consultation on an additional priority focus population.
Addendum

Recommendations for Social and Cultural Analysis Projects
From the Future Strategies Committee
Approved with the Report: May 22, 2008

The Committee envisions four primary kinds of activities under this heading and the steps in their development as follows:

1. **JC Board Briefing**—This is seen as the “Bryan Hehir type briefing” which occurred at Scottsdale, e.g. bringing in someone (Jesuit or not) who can do a substantive overview of an area of the Church, the apostolate, or society for consideration by the provincials.
   
   a) *Initiated by*—any member of the JC board or staff or a committee of the conference.
   
   b) *Approved by*—the Executive Committee as part of its agenda preparation.

2. **In-Depth Research Project**—This envisions a project which will involve Jesuits and others (academics and practitioners) looking deeply at an area of need or opportunity in relationship to our ministries. Generally, such a project would involve an extended period (e.g. multi-year) and a number of persons and have a significant associated costs (travel, meetings, printing, and possibly even independent research).

   a) *Initiated by*—any member of the JC board or staff or a committee of the conference.

   b) *Approved by*—the JC Board in a two-step process, that is, the initial project approval and, after the design phase, approval of the overall project including a proposed budget.

3. **Regular Research Briefings**—In the JC meeting binders would be a section containing a synopsis (e.g. Executive Summary) of significant research published since the last board meeting and/or on a topic or topics of current concern to the conference, e.g. the recent PEW study on US Catholics. The coordinator might conduct an “inquiry” on an apostolic matter (consultation with key pastors or educators) and produce a short report of the inquiry results for the JC Board.

   a) *Initiated by*—any member of the JC board or staff or a committee of the conference.

   b) *Approved by*—the JC Secretary for Social and International.

4. **Requested Research Sources**—In these cases, a request is made that the research office identify a limited number of persons and studies available to assist them in a particular matter, e.g. educational or social needs in a particular geographical area. The research coordinator would consult available resources and the research advisory group to identify some persons and written studies which would assist the person(s) making the request.

   a) *Initiated by*—any member of the JC board or staff or a committee of the conference.

   b) *Approved by*—the JC Secretary for Social and International.