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Developing a Shared Vision of “Collaboration from the Beginning” –
A Critical Conversation within the Union of Catholic Apostolate

A DISSERTATION

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By

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Developing a Shared Vision of “Collaboration from the Beginning” – A Critical
Conversation within the Union of Catholic Apostolate

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One unique form of collaboration is “collaboration from the beginning,” a central aspect of the spirituality and functioning of the Union of Catholic Apostolate (UAC), an international public association of the faithful, founded in 1835 by St. Vincent Pallotti. This type of collaboration does not occur naturally when a group comes together. Formation is necessary, particularly formation in collaborative leadership. The purpose of this project is to begin a “critical conversation” among the members of the National Formation Committee of the UAC in the United States which will assist the UAC to: 1) begin a process of development of a shared vision of “collaboration from the beginning” for use in local initial and on-going formation programs of the UAC; 2) provide data and a process for continued dialogue by UAC leadership on the concept of “collaboration from the beginning” and its significance for the life and work of the UAC; and 3) offer to others in ministry a process for formation in collaboration.

This dissertation by Frank S. Donio fulfills the dissertation requirement for the doctoral degree in Ministry approved by Rev. Romuald Meogrossi, OFM Conv., Ph.D., as Director, and by Rev. James Wiseman, O.S.B., S.T.D., and Rev. James Coriden, J.D., J.C.D., as Readers.

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Dedication

This work is dedicated to the Members of the Society of the Catholic Apostolate, especially those of the Immaculate Conception Province, and to my family, particularly my parents, Frank G. and Angela L. Donio.

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CHAPTER ONE

INTRODUCTION

The word *collaboration*, often used in church circles, carries a variety of meanings. One unique form of collaboration is “collaboration from the beginning.” According to an appendix to its *General Statutes*, “collaboration from the beginning” is a central aspect of the spirituality and functioning of the Union of Catholic Apostolate (UAC), an international public association of the faithful, founded in 1835 by St. Vincent Pallotti. The phrase was first introduced into UAC documents by Father (now Bishop) Sèamus Freeman, S.A.C., a former Rector General of the Society of the Catholic Apostolate and former President of the UAC. “Collaboration from the beginning” occurs when all are invited to be involved in the task from the start. Individual giftedness is respected and nurtured, all are a part of the analysis of the issue and make and act on decisions in a communal fashion. This type of collaboration does not occur naturally when a group comes together. Formation is necessary, particularly formation in collaborative leadership.

The UAC is a co-equal association of laity, religious and clergy. The hierarchical nature of the Catholic Church, particularly within the religious communities or “core communities” that are a part of the UAC, however, often make this form of collaboration a challenge to actualize. Individual members of the UAC could be laity, those in consecrated life, or clergy who are not members of one of the core communities. Since the *General Statutes* of the UAC were approved by the Holy See in 2003 the UAC in the United States

has begun to develop a more formal structure that does not rely solely on the core communities for leadership. The expansion from an association led by members in consecrated life, particularly clergy, to one led by laity as well, has not happened without some conflict and misunderstanding. Initial and on-going formation of all members, especially those in leadership, in “collaboration from the beginning” is necessary for the proper functioning of the UAC in the spirit of St. Vincent Pallotti.

Purpose of the Project

The purpose of this project was to begin a “critical conversation” among the members of the National Formation Committee of the UAC in the United States which will assist the UAC in coming to a “shared vision” of “collaboration from the beginning.” A “critical conversation” is a form of team learning that occurs through dialogue and the confrontation of conflict. The collaborative process by which the committee undertakes the “critical conversation” will provide the basis for a process of development of a “shared vision” within initial and on-going formation sessions at the local and national levels of the UAC.

Project Research

The works of St. Vincent Pallotti and UAC texts, particularly *In a Constant Search for Faithfulness* and “Together for One Another – The Characteristics and Way of the Union,” formed the theological and spiritual core of the project. The work of Peter Senge and Thomas Hawkins on organizational learning (particularly individual and team) and shared

vision, Jane Regan on critical conversation, and Loughlin Sofield, Carroll Juliano and Evelyn and James Whitehead on collaboration in ministry provided the theoretical and methodological aspects of the project.

Project implementation

The project was a three session (four hours per session) program for the National Formation Committee of the United States National Coordination Council of the Union of Catholic Apostolate that provided an opportunity for the committee to reflect on and practice collaboration. The sessions were meant to form the basis for a collaborative process of formation at the local level of the UAC. The National Formation Committee is composed of six leaders of the UAC. The group ranges in age from fifty to seventy-five. There are five lay people (three men and two women) and one religious sister. All, but one, have college educations. Two have doctorates. Two are engaged in full time ministry.

The project was accomplished through three sessions held at Bishop Eustace Preparatory School in Pennsauken, New Jersey. The main texts for the project were *Collaboration* by Loughlin Sofield and Carroll Juliano and UAC texts related to collaboration. The sessions included prayer, critical conversation, sharing of individual experience and individual views of collaboration, and on-going development of a shared vision of collaboration.

Project Evaluation

The project was evaluated through the use of pre and post-surveys of the group measuring the individual visions and shared vision of collaboration and on group process. The surveys were developed with the assistance of the St. Vincent Pallotti Center for Apostolic Development which often conducts surveys of lay people in ministry for their internal programmatic use. Individuals in the group were also asked to submit an evaluation of the content of the sessions and the quality of facilitation.

Contribution to Ministry

The project was intended to: 1) begin a process of development of a shared vision of “collaboration from the beginning” for use in local initial and on-going formation programs of the UAC; 2) provide data and a process for continued dialogue by UAC leadership on the concept of “collaboration from the beginning” and its significance for the life and work of the UAC; and 3) offer to others in ministry a process for formation in collaboration.

In order to understand the life of the UAC today and the significance of collaboration within it, it is very important to review the development of the idea from the time of St. Vincent Pallotti to the present day. Chapter Two will trace this development. The ecclesiology of the UAC will be presented in Chapter Three. Chapters Four and Five will offer an overview of the theoretical and practical dimensions of the project. Finally, Chapter Six will provide some conclusions along with some considerations for future development.

CHAPTER TWO

VINCENT PALLOTTI AND THE UNION OF CATHOLIC APOSTOLATE

The Union of Catholic Apostolate (UAC), a co-equal association of lay people, religious and clergy, was founded in Rome in 1835 by the Roman priest Vincent Pallotti. This association was and is unique in the Church since leadership from the association can come from all states of life. Pallotti intended from the beginning for this to be the case. Of course, there were associations that had some similarity to the UAC, but nothing as comprehensive as Pallotti's vision. Not surprisingly, he encountered opposition to his idea from various quarters within the Church. While this opposition did not fully prevail during Pallotti's lifetime, it did prevail following his death. Only in 2003 did Pallotti's co-equal, collaborative association, the UAC, receive universal approbation by the Church.¹

The first half of the nineteenth century saw the advent of a number of associations, movements, and new apostolic and missionary religious communities. These groups flourished in Europe following the fall of Napoleon in 1814. Enlightenment thought provided the philosophical underpinnings for the French Revolution and its wholesale abandonment and rejection of Christianity in general and Catholicism in particular. The French Revolution affected not only France, but also spawned revolutionary activity in the Papal States. The Papal States, which encompassed most of the middle portion of the Italian peninsula including Rome, was ruled by the Pope who was not only a spiritual leader, but an

¹ The general outline of the historical context and development of the UAC that follows is based on the UAC document *The Charism of St. Vincent Pallotti: Origin, Development, Identity* (Rome: UAC, 2004).

absolute monarch as well. The Revolution in France emboldened revolutionaries in Rome and aided by Napoleon's France they overthrew the papal government in 1798 and exiled Pope Pius VI who died outside of his kingdom in 1799. By 1800 the Papal States were restored and the newly elected Pius VII returned to Rome. He negotiated with Napoleon which at first was successful and led to a concordat between the Holy See and France in 1801, which conceded confiscated Church property to France, but restored Catholicism as the state religion. France added to the Concordat on its own, however, and greatly limited papal authority without government consent within the country. Pius protested against this act on the part of the French. Napoleon responded in 1808 by invading Rome and annexing the Papal States to France. Pius retaliated with excommunications of all involved with the invasion. Napoleon then removed the Pope from Rome in 1809 and held him captive. Pius did not return to Rome until five years later in 1814 following the defeat of Napoleon. The Papal States were restored during the Congress of Vienna, the conference of great powers countries that followed the Napoleonic wars and brought a restoration of the monarchy in France and other areas affected by the Revolution. Following his return to Rome and the restoration of the Papal States, Pius and his successors, until the election of Pius IX in 1846, established an authoritarian government that was ruled by clerics with the pope as an absolute monarch. Lay participation was limited not only in the Church in the Papal States, but also in the government.

Vincent Pallotti's formative years prior to ordination to the priesthood in 1818 at the age of twenty-three, took place with the history briefly described above as a backdrop. He

did not live in a remote Italian village, but was born, raised and did his entire life's ministry in the city of Rome. The walk between the home where he was born and raised and the house where he died is about fifteen minutes. After he was ordained under patrimony² in the Lateran Basilica, Pallotti had to find work for himself and functioned as a tutor for seminarians at the Sapienza University and spiritual director in several of the national colleges for seminarians from various countries.

One of these colleges, Propaganda Fide, was a house of formation for those who following ordination would be engaged in foreign missionary work. Through his work in spiritual direction there, Pallotti came to know of the need for spiritual books in Arabic for use by Chaldean Catholics in Mesopotamia and Kurdistan. In April of 1835, he worked with a small group of clerics and lay people to raise funds to print in Arabic the *Eternal Maxims* of St. Alphonsus Ligouri. Earlier in that year on January 9th, Pallotti had an inspiration to found a Society (Union) of laity, religious and priests. It would be universal in nature and would have as its aims: spreading the faith to those who did not believe, "reviving the faith" of Catholics and living out this faith by doing an extensive apostolate.³ Pallotti was very broad

² This was a system by which a man could be ordained if his family ensured that his financial situation was secured usually through some type of property given for this purpose to the newly ordained. Pallotti was given by his father a commercial and residential building in Trastevere which to this day is owned by the Society of the Catholic Apostolate, the congregation of priests and brothers.

³ Vincent Pallotti, *I Lumi*, Vol. X of *Opere Complete* (Roma: Curia Generalizia della Società dell'Apostolato Cattolico, 1977), 198-199.

in his thinking about who could be a part of this Union. He acknowledges the giftedness of all and their possibility to contribute when he states,

Every Catholic, whether priest, religious or layperson, should rejoice because all of his talents, knowledge, learning, studies, power, nobility, profession, art, earthly goods, riches, service, prayers used or done from for the propagation of faith and the rekindling of charity in the world can acquire the merit of the Apostolate.⁴

Following the publication of the *Eternal Maxims*, Pallotti had a practical reason to found the inspired group. He states that,

[i]n order not to expose this good work [the printing of the *Eternal Maxims*] to any slander from gossipers, it was thought prudent to form a pious Society, which considering the present need of the Church, could have the purpose of procuring the multiplication of the spiritual and temporal means necessary and appropriate to revive Faith, rekindle charity among Catholics, and propagate such faith and charity throughout the world.⁵

In order to form his Catholic (Universal) Apostolate Pallotti needed the approval of the Holy See. He addressed the initial request to Cardinal Carlo Odescalchi who was the Vicar-General of Pope Gregory XVI which meant that he had charge over the internal affairs of the Diocese of Rome. On April 4, 1835, Pallotti was granted permission by Odescalchi. Throughout these writings Pallotti referred to the foundation as the “Catholic Apostolate” but he preceded this with “pious Union.”⁶ Pallotti then petitioned Pope Gregory XVI for his blessing. The reply was written by Odescalchi on July 11, 1835. In it he referred to the

⁴ Vincent Pallotti, *Manoscritti Giuridici: Appelli e Statuti*, Vol. IV of *Opere Complete* (Roma: Curia Generalizia della Società dell’Apostolato Cattolico, 1967), 326.

⁵ Vincent Pallotti, *Appendice Alla Regola*, Vol. III of *Opere Complete* (Roma: Curia Generalizia della Società dell’Apostolato Cattolico, 1966), 2.

⁶ Pallotti, *Manoscritti Giuridici: Appelli e Statuti*, Vol. IV of *Opere Complete*, 6.

“pious Union” as the “Society of the Catholic Apostolate. From that time forward Pallotti in his writings uses this name, but means the entire foundation when he does use it.

In 1835 Pallotti divided the Union into three distinct parts: “workers,” “spiritual collaborators,” and “temporal collaborators or benefactors.”⁷

The workers were priests or lay people who were directly involved in the ministries of the Union. Pallotti did not expect those who joined as workers to give up their other obligations. He believed that “. . . it is not necessary, ordinarily speaking, that the person consecrates himself totally to the association by renouncing his occupation or duty.”⁸ A person could give whatever time that person had to the work of the Union.

The works of the Union were broken down into those done inside the Church and those done outside the Church. The internal works deal directly with the rekindling of faith among Catholics. These works were done through preaching, printing of religious materials, promoting devotions and service activities. The external activities of the Union were patterned after the Church’s missionary efforts by incorporating the internal works listed above and directing them to the external life of the Church.⁹

Pallotti did not restrict his work to priests but was inclusive of lay people. If a person was competent and possessed the right credentials then that person could exercise the

⁷ Union of Catholic Apostolate, *The Charism of St. Vincent Pallotti: Origin, Development, Identity*, 16.

⁸ Pallotti, *Manoscritti Giuridici: Appelli e Statuti*, Vol. IV of *Opere Complete*, 146.

⁹ Vincent Pallotti, *Pia Società dell’Apostolato Cattolico*, Vol. I of *Opere Complete* (Roma: Curia Generalizia della Società dell’Apostolato Cattolico, 1964), 146-148.

apostolate on a full time basis. Pallotti even provided compensation for lay members of the Union who would teach the missionaries that he wanted the Union to train.¹⁰

The spiritual collaborators, according to Pallotti's plan, would be those who would pray for the growth and continuance of the Union. He designed a regimen of activity for the members of this group which included various spiritual practices of the day.¹¹

The temporal collaborators were the benefactors to the Union. Pallotti knew that without financial means the work of the Union would not flourish. He established a very practical plan in which the benefactors would donate on a regular basis. He suggests "small monthly offering[s]" for members of this group.¹² A person became a member and then began to donate to the Union. The donor would then receive a "share in the spiritual benefits and suffrages" of the Union.¹³

All those in the above groups were considered members by Pallotti. These three groups, in his original plan, were to be directed by a "central council" which granted entrance into one or the other group. The original structure that Pallotti envisioned was rather loose and inclusive. Anyone who participated in any of the groups was considered a full member. The workers, though, were responsible for overall governance.¹⁴

¹⁰ Pallotti, *Manoscritti Giuridici: Appelli e Statuti*, Vol. IV of *Opere Complete*, 149.

¹¹ Pallotti, *Pia Società dell'Apostolato Cattolico*, Vol. I of *Opere Complete*, 150-154.

¹² *Ibid.*, 156.

¹³ *Ibid.*, 157.

¹⁴ *Ibid.*, 161.

From 1835 until 1839, the Union utilized a loose version of this structure and was able to accomplish several projects. In 1836, Pallotti and the members of the Union initiated a celebration of the Octave of the Epiphany. Over the course of the Octave, Pallotti would invite Eastern Rite Catholics to provide liturgical celebrations and all would be invited to participate. Very few in Rome were aware of the various Eastern Rites of the Church, but Pallotti saw this celebration as an opportunity to share the richness of these traditions with those who were unfamiliar. The celebration of the Octave was a collaborative effort meant to underscore the diversity and unity of the Church.

Another early work of the Union was the *Pia Casa di Carità*. This orphanage for girls was created in 1837 following an outbreak of cholera in Rome. Many children were left orphaned after this epidemic. This work was not only directed by the Union, but the building that housed the orphanage (the former Fuccioli College) was given by Pope Gregory XVI to the Union for this purpose.¹⁵

As with many new works in the Church, the Union had its detractors. Some objected to the use of the phrase “Catholic Apostolate” as somehow diminishing the proper task of the hierarchy, particularly the Pope. Others objected to the Union as duplicating the work of other groups such as the Society for the Propagation of the Faith. Propaganda Fide, the congregation of the Holy See that oversaw missionary efforts and the education of missionaries, was displeased with the desire of the Union to found a “Mission College.” The

¹⁵ Pallotti, *Manoscritti Giuridici: Appelli e Statuti*, Vol. IV of *Opere Complete*, 250-251.

details of these conflicts are not germane to the purposes of this discussion, what is, though, is that these conflicts along with others were present and the complaints from the Society and from the Propaganda led to the drafting of a decree of dissolution of the Union in July of 1838. Pallotti was presented with a copy of the draft by the Secretary of the Propaganda. Pallotti was able to successfully petition Gregory XVI to permit the Union to continue its activities, except for fund-raising for the Missions and the approval of the Mission Seminary that Pallotti and the Union founded in 1837.

Possibly because of this controversy and due to the intense pastoral work that he was engaged in as Rector of the Holy Spirit Church of the Neopolitans, Pallotti collapsed from exhaustion. Pope Gregory, former abbot of the Camoldolese Monastery, arranged for Pallotti to go to the monastery and rest. Pallotti stayed with the Camoldolese monks for six months. During this time of rest, Pallotti engaged in prayer and reflection. He began to write and developed a systematic blueprint for the Union. This document, *Regola della Pia Società dell'Apostolato Cattolico* or the "Rule of 1839," changes and expands the structure of the Union. The first group or central leadership of workers shifts from lay people and priests to the "congregation of priests and brothers."¹⁶ The second group, spiritual collaborators, becomes the "congregation of sisters."¹⁷ The third group, material collaborators, becomes a group that contains all the other members. Pallotti notes,

¹⁶ Pallotti, *Pia Società dell'Apostolato Cattolico*, Vol. I of *Opere Complete*, 2.

¹⁷ *Ibid.*, 2.

All the faithful of both sexes who have joined or will join individually, in family groups, of the clergy from the cities or Dioceses, or of moral bodies in seminaries, colleges, monasteries, convent schools, hospices in cities, Dioceses, etc.¹⁸

This change is the greatest one from Pallotti's 1835 plan. In that plan a person could be involved in the Union as a result of the type of work he or she did, be it full or part-time. In the Rule of 1839, however, the criterion was whether or not the person was committed full time to the Union. Leadership was placed into the hands of the priests rather than both priests and lay people. The structure moved away from an inclusive, collaborative model to one that was more hierarchical and also more in keeping with what was expected of Church associations of his day.

In the Rule of 1839, Pallotti envisioned quite a large mass movement. He called this structure the "Procura." It was broken down much like the Church into the General, Roman, Provincial, Diocesan, and Local "Procurae." Each of these sections would be headed by a Rector and then divided into thirteen additional sections each headed by an individual Procurator. The thirteen areas had a different apostle as its patron covering some area apostolic endeavor.¹⁹ The groupings were meant to encompass everyone and all apostolic endeavors everywhere. This systematic organization and mobilization of all was Pallotti's way of addressing the turmoil of his time. By putting forward such a plan he envisioned a renewed and revitalized Church.

¹⁸ Ibid., 2.

¹⁹ Ibid., 60-68.

The laity in the Rule of 1839 were not in the forefront as they once were. While they could be heads of one of the thirteen “Procurae” from the Diocesan level on down, they were only permitted to do this when there were not enough clerics. The “central moving part” of the whole association became the congregation of priests and brothers.

No documentation shows that Pallotti changed his understanding due to the conflict he was having. He is cautious in the way he writes about the Union, though. Pallotti even sees the need to justify the name of “Catholic Apostolate” at the beginning of the Rule of 1839. He notes that just as the Society of Jesus did not claim the whole person of Jesus, the Society (Union) of Catholic Apostolate did not claim the whole of that apostolate but “. . . it can respect, venerate, serve and assist the Catholic Apostolate.”²⁰ His model of 1835 of workers being either lay people or priests and the collaborative leadership shared among them was not typical in the nineteenth century and possibly was unique.

After 1839, the lay collaborators in the Union did continue the works of the association including the House of Charity. By 1842, the group of women who directed the internal life of the House of Charity became the congregation of sisters. In the 1840’s Pallotti began to put more of his focus on his small congregation of priests and brothers that began to come together in 1837 in the Holy Spirit Church where he was Rector. In 1846, Pius IX was elected pope and Pallotti requested approval of his congregation. With Pius there was no difficulty with the name “Catholic Apostolate.” Pius directed Pallotti to give Cardinal Luigi Lambruschini, former Cardinal Secretary of State, the Rule of 1839 so that the

²⁰ Ibid., 2.

Cardinal could examine it for him and suggest necessary changes. Pallotti saw this group as something larger than just a congregation of priests and brothers. In the preface of the Rule of 1846 he states that,

since the necessities of the world are always increasing more and more, it [the Society] proposes of inviting also the laity of one or of the other sex, grade, condition and profession of the People, wherefore they are still animated of the true Christian charity and to assist gratuitously with half the means, and with personal works and also with works of their profession, and all with prayer, and everyone profiting from all the gifts of nature and grace that they have received from God, they would use them in a manner more energetically, actuated and persevering for the greater glory of God and for the exercise of all works of spiritual and corporal mercy more perfectly.²¹

The congregation of priests and brothers, though, is placed firmly as directors of this association. The Rule of 1846 allows for little ambiguity on this point when it states,

[The Society] is directed by the Congregation of Priests that live in community under one rule. A Pious Union of holy persons, all dispersed, loses more easily the activity and stability of the works of charity and zeal, if it not be for a congregation of . . . Priests . . . that form a state of life of perfect community and of perfect common life, which . . . may be like the soul and motory part of all the Pious Society, whence to hold alive all the acts of charity and of zeal of the same.²²

The idea of a group of lay people and clergy working collaboratively together with one another remains in a reduced form in comparison to 1835.

Pallotti continues to work with what he has and does not develop further his larger vision of the Union. By the time he dies in January of 1850, he has twelve priests and brothers who conduct various charitable works, a church and house in Rome and a mission in

²¹ Vincent Pallotti, *Regola della Congregazione dei Preti e Fratelli Coadjutori dell'Apostolato Cattolico: 'Copia Lanbruschini', 1846, Vol. VII of Opere Complete* (Roma: Curia Generalizia della Società dell'Apostolato Cattolico, 1972), 3-4.

²²Ibid., 4.

London, a small congregation of sisters at the House of Charity, and a group of lay people. The grand dream of the Union was not realized, although the idea was there. Elements of Pallotti's ideas would be present over the next period between the time of his death and his canonization in 1963.

The congregation of priests and brothers continued as a very small group, but they had the protection of Cardinal Lambruschini who was personally devoted to their continuance in tribute to his confessor, Vincent Pallotti. In May of 1854, Lambruschini died and following that the name of Society of the Catholic Apostolate was removed by Pope Pius IX to spare the congregation from further attack. He replaced it with Pious Society of the Missions.²³ Foreign missionary work, a partial aspect of Pallotti's plan, became the central focus of the small congregation.

Little was done to continue the development of Pallotti's larger vision of the Union of Catholic Apostolate, but the congregation of priests and brothers and that of the sisters began to grow considerably as the Church expanded into new mission territory during the last half of nineteenth and first half of the twentieth centuries. By 1909 the congregation of priests and brothers had 500 members and 56 houses in Africa, Europe and North and South America. The sisters began to move beyond Italy as well and in the 1890's had women from Germany who did formation in Rome. This group eventually went back to Germany, completed their formation through the assistance of the priests and brothers congregation

²³ Franco Todisco, "The Strength of the Charism of the Union of Catholic Apostolate" (paper presented at the St. Vincent Pallotti Institute, Rome, Italy on April 30, 2007).

there, and a new community came into being, the Congregation of Missionary Sisters of the Catholic Apostolate. These three communities Society of the Catholic Apostolate (SAC - priests and brothers), Congregation of Sisters of the Catholic Apostolate (CSAC), and the Missionary Sisters, would be called by the 1980's the Core Communities of the Union of Catholic Apostolate.

The understanding that a lay element was part of Pallotti's original plan was not lost on some members of his congregations. Fr. Joseph Kentenich, a German Pallottine, in 1914 founded the Schönstatt Movement, a spiritual and apostolic movement of priests, sisters and lay people. While it is clear that Kentenich borrowed from Pallotti for his organization, particularly the divisions of clergy, religious and laity found in the Rule of 1839, he adds spiritual elements that have no basis in the thought of Pallotti, particularly devotion to Mother Thrice Admirable and the replication, in various parts of the world, of a chapel found on Pallottine property in Vallendar, Germany.

The Schönstatt Movement spread throughout the German-speaking and German influenced parts of the congregation of priests and brothers. Tensions with Schönstatt created division within the community of priests and brothers (SAC) and the Holy See eventually separated the Schönstatt Movement from the Pallottines in 1964.

The Schönstatt Movement was the first, but lay communities and communities of sisters inspired by the charism of Vincent Pallotti were also founded in Europe, South Africa

and India between 1921 and Pallotti's canonization in 1963.²⁴ The uniqueness of the Schönstatt Movement in the history of the Union of Catholic Apostolate is stated clearly in a juridical justification for the Union presented in 2002 to the Pontifical Council of the Laity and later published in 2004 under the title *The Charism of St. Vincent Pallotti*. This document states that

[t]he fact that the Union continued to live and work [beyond 1854] was not least of all demonstrated in the development of the international Schönstatt Movement in the first third of the twentieth century. It has its roots in a Pallottine house of formation and understands itself from the start as a contemporary realization of the world-wide apostolic organization of Vincent Pallotti.²⁵

The grand idea of Pallotti, though not lost, was adapted by the Schönstatt Movement and the tension leading up to and following the separation of 1964 did slow the development of the Union in a way that was fully authentic to Pallotti's thinking. Developments within the Church and in the communities of priests and brothers, sisters and laity following the canonization of Pallotti and the Second Vatican Council created a climate of greater understanding and growth for the Union.

In 1947, the Holy See permitted the public use of "Catholic Apostolate" by the foundation of Pallotti and the communities of priests and brothers and of sisters changed the names of their congregations to what Pallotti originally intended.²⁶ Pallotti was beatified in 1950 and a new interest in his spirituality developed among the communities. In the United

²⁴ Union of Catholic Apostolate, *The Charism of St. Vincent Pallotti: Origin, Development, Identity*, 33.

²⁵ Ibid., 33.

²⁶ Ibid., 31-32.

States, for example, congresses of the “Society” (Union) were held in 1958 and 1959 that were gatherings of spiritual and educational formation for members of the priests and brothers, the sisters, and also for lay people. Also in the United States, a small manual of formation was developed in 1962 for “SAC Cells” of lay people who would pray, be given spiritual formation and do charitable works. The division of the Rule of 1839 between priests and brothers, sisters and lay people remained. Although the group was seen as a single whole, the divisions were clear and the leadership was firmly in the hands of the priests and brothers.

The canonization of Pallotti on January 20, 1963, just after the close of the first session of the Second Vatican Council, permitted the use of Pallotti’s spirituality as the official spirituality of all groups inspired by his charism. Prior to this time the official spirituality of the Pallottine communities was that of St. Francis de Sales. Pallotti borrowed from the spirituality of de Sales, particularly that personal holiness was possible for all, not simply clergy and religious.

Following the Second Vatican Council, the congregations of Priests and Brothers and of Sisters reviewed their way of life in keeping with the call of the Council in *Perfectae Caritatis*.²⁷ The response to this call by the priests and brothers was an Extraordinary General Chapter which met for six months during 1968 and 1969. In his opening remarks of the Chapter, the Rector General of the congregation of Priests and Brothers, Father Wilhem Moeller who led the community through the problems with Schönstatt addressed the need for

²⁷ Second Vatican Ecumenical Council, Decree on the Adaptation and Renewal of Religious Life, *Perfectae Caritatis*, 2-3.

continued development of the entire vision of Pallotti which he and the Fathers of the Chapter referred to as the *Opus externum* or external work. The name Society of the Catholic Apostolate, first applied to what Pallotti called the “Pious Union of Catholic Apostolate,” was applied after 1947 to the congregation of Priests and Brothers rather than to the whole (or external) work (*Opus externum*) of Pallotti which by the late 1970’s used the name Union of Catholic Apostolate. Moeller notes the importance of this larger vision regardless of any problems of the past:

In this connection allow me to say one last word about the *Opus exturnum* of our Society. In the past few years it was the subject of many discussions, especially in connection with the "Schönstatt Question." Since the separation of the Schönstatt Movement from our Society, the problem of the realization of the *Opus externum* has not been solved; in fact, its solution is particularly urgent today. I was a bit alarmed when I heard at times that after the disappointment which we experienced in the recent past, some are of the opinion that we should altogether forget about the idea of an *Opus externum*. The reasons they give for their opinion are these: other movements or the Church herself have taken over the essential tasks of such an *Opus externum* or such an *Opus* is no longer appropriate and therefore outdated. The Chapter will have to examine whether according to the mind of our founder this so-called *Opus externum* is an essential part of his foundation or not and also how such an *Opus* could be actuated today.²⁸

The Chapter agreed that the *Opus externum*, although it could not decide on a name for the work, was fundamental to the congregation of Priests and Brothers and not only for them but was also the work of the communities of Sisters.

²⁸ Society of the Catholic Apostolate, *Documents of the Twelfth, Extraordinary, General Chapter* (Baltimore, MD: Pallottine Press, 1969), 21-22.

The decision to call the association “Union of Catholic Apostolate” came at the 1971 General Assembly of priests and brothers.²⁹ Little progress was made in the development of the UAC due to the need for updating within the three main religious communities. The three “Core Communities” of the UAC, the Society of the Catholic Apostolate (priests and brothers), the Sisters of the Catholic Apostolate, and the Missionary Sisters of the Catholic Apostolate all adopted with the approval of the Holy See, a common “Preamble” to either their Law or Constitutions. The “Preamble” shows clearly that collaboration is at the core of the charism of St. Vincent Pallotti. It states,

Faced with the worsening crisis of faith that the Church of his time had to confront and the ever-increasing tasks for spreading the Gospel in mission territories, St. Vincent Pallotti saw the urgent need to revive faith and renew charity among Catholics, with the intention of bringing all people to unity of faith in Christ. To respond to this need, he considered it indispensable to secure the collaboration of all members of the Church, both clergy and laity, and to unify their efforts in order to promote with greater effectiveness her apostolic mission.³⁰

Recognition of a common spirituality and a desire to collaborate with one another culminated in the promulgation of the *Preamble*. In the 1980’s the understanding of collaboration within the UAC expanded to include the laity, not only as members of the UAC, but as co-equal partners. The impetus for this shift was the celebration of the one hundred fiftieth anniversary of the UAC in 1985. Sèamus Freeman writing in 1996 explains this development,

²⁹ Sèamus Freeman, *In a Constant Search for Faithfulness* (Rome: Society of the Catholic Apostolate, 1996), 25.

³⁰ Society of the Catholic Apostolate, *Law of the Society of the Catholic Apostolate* (Rome: Society of the Catholic Apostolate, 2004), Preamble, n. b.

1983 marks a further extension of the principle of “collaboration of all”. Up to this time there was the communion of the INSTITUTES [sic] of the Pallottine Family. However, with the publication of the preparatory document for the 1985 celebrations, and with the title “One hundred and fifty years of the Union of the Catholic Apostolate (1835-1985)”, there was a new development. The signatories of the document extend the circle of participation to include those who are not members of Institutes, but who have a consciousness of being members of the foundation of St. Vincent Pallotti. From this point on, the process of discernment avails of the participation of all expressions of membership of the Union of Catholic Apostolate.³¹

The signatories included a lay community based in Rome, Quinta Dimensione, founded in the late 1960’s by a member of the community of priests and brothers. In Rome and in various parts of the world celebrations marking the 150th anniversary of the founding of the Union of Catholic Apostolate were held. Groups of lay people were formed by members of what came to be called the Core Communities of the Union (SAC, CSAC, and Missionary Sisters).

In the United States, groups of lay people formed in the spirituality of St. Vincent Pallotti and called “Cenacles” of the Union of Catholic Apostolate began to take shape. These were all directed primarily by a member of the Core Communities and were based in parishes and other apostolates of these communities in Maryland, New Jersey, New York and Wisconsin. The amount of formation for each group differed, but all of the groups had some formation in prayer and in the spirituality of St. Vincent Pallotti. All of the groups engaged in some charitable work.³²

³¹ Freeman, *In a Constant Search for Faithfulness*, 27.

³² United States National Coordination Council, Annual Meeting Minutes, April 5-6, 2002, 1-2.

From 1975 until 2000, there were national gatherings of members of the Core Communities and members of the “Cenacles” that were called Pallottine Horizons. From 1975 until 1985, only the members of the Core Communities participated in these week-long meetings. For the Jubilee of the 150th anniversary of the Union of Catholic Apostolate in 1985, these gatherings were extended to lay people who were interested in Pallottine spirituality and later to members of the Cenacles that were founded in response to the Jubilee year.

These gatherings were meant to assist the members of the Union of Catholic Apostolate with deeper formation, prayer and a greater understanding of their mission. The relationships that were formed among members of the Core Communities and also with the members of the Cenacles were an important by-product of these meetings. The organization that sponsored Pallottine Horizons and also assisted in promoting greater collaboration between the Core Communities and the Cenacles, was the Pallottine Apostolic Union of North America (PAUNA). This body was formed in the late 1970’s as a means by which the Major Superiors of the Core Communities could come together to discuss common issues. Over time this body sponsored not only the Pallottine Horizons gatherings, but also a lay volunteer organization and a magazine for members of the Union in North America. The initiative included Union members both religious and lay who were in Canada as well.

Pilgrimages to Rome for both adults and young people were arranged for the 150th anniversary celebration of the Union of Catholic Apostolate in 1985. A couple thousand participants from various parts of the world attended these celebrations. A similar

international pilgrimage occurred in 1995 for the 200th anniversary of the birth of St. Vincent Pallotti. These experiential moments along with an international coordination body that was established in 1986 and the development of a manual of formation in 1989 provided opportunities for further development of the Union.³³

Three General Assemblies of the Society of the Catholic Apostolate (Fathers and Brothers) in 1989, 1992 and 1998 addressed directly the structural development of the Union of Catholic Apostolate. The 1989 Assembly examined issues such as membership and executive structure.³⁴ By the Assembly of 1992 there was a call for “the preparation of General Statutes of the Union and to take steps toward the formal approval of the Union of Catholic Apostolate in the Church.”³⁵ The Assembly of 1998 took the dramatic step of approving a draft of the General Statutes of the Union of Catholic Apostolate by decree. This decree acknowledges developments of the past and the executive structure of the “International Council” of the UAC as a partner in the development of the General Statutes and the Union as a whole. It states,

The General Statutes of the Union of Catholic Apostolate (Minutes of the XVIII General Assembly, pp. 41-55) is approved “ad experimentum” and its application is decreed, with the exception of the articles that presuppose the public juridical

³³ Union of Catholic Apostolate, *The Charism of St. Vincent Pallotti: Origin, Development, Identity*, 41.

³⁴ Society of the Catholic Apostolate, *Together We Journey, Together We Serve: Final Document of General Assembly XVI* (Rome: Society of the Catholic Apostolate, 1990), nn. 22-29, 25-28.

³⁵ Society of the Catholic Apostolate, *In the Union to Evangelize: Final Document of the Seventeenth General Assembly* (Rome: Society of the Catholic Apostolate, 1992), n. 16, 21.

capacity of the Union (art. 8, 11, 64 and 68-71). It delegates the General Council to: make the amendments to the General Statutes decreed by the XVIII General Assembly; take the necessary steps for the application of the Decree; arrange its promulgation and the date when it will come into force; ask the Apostolic See for recognition of the Union; perform these tasks in collaboration with the present International Council of the Union.³⁶

This “International Council” came to be called the General Coordination Council of the UAC. The General Coordination Council (GCC) was composed of thirteen members: the three Generals of the Core Communities and ten appointed members who were “representative and of the internationality and diversity of the UAC.”³⁷ In October of 1999, the GCC issued “UAC Project 2000”. The project which contained an initial version of the General Statutes of the UAC called for the development of National Coordination Councils (NCCs) which were meant to enhance collaboration in each country among the communities, groups and Local Coordination Councils of the Union. These Local Coordination Councils are the primary place for prayer, formation and apostolic action. They are not simply administrative bodies. As introductory letter to *UAC Project 2000* signed by the three General Superiors of the Core Communities in the name of the General Coordination Council underscores the central role of the Local Coordination Councils. The letter states that,

[t]hese are more than Councils. They are “places”. They are our “sacred space” . . . They are the life, the breath of the UAC. Without these experiential places, the UAC General Statutes would resemble a dead body that, though very carefully embalmed, remains lifeless. They are places of meeting in search of unity, places of communion,

³⁶ Society of the Catholic Apostolate, *Faithful to the Future: Final Document of the XVIII General Assembly* (Rome: Society of the Catholic Apostolate, 1999), n. 5.2.3, 35.

³⁷ Union of Catholic Apostolate, *UAC Project 2000* (Rome: Union of Catholic Apostolate, 1999), 10.

places of formation and the experience of faith and mission, places of reciprocal enlightenment and of universal charity. They are our Nazareth of reverent listening. They are our Cenacle of vocation maturation. They are the places for the research and experience of Pallottine ecclesiology. They are the place where the living culture, signs and symbols of the UAC are developed. They are our gift to the Church of Christ. We have too few such places. ***We make the strongest possible appeal to all of you to be involved in responding to this priority.*** [sic]

The description above clearly shows that a comprehensive spiritual and apostolic formation of members of the UAC is the goal of this “sacred space” of the Local Coordination Councils. All members, clergy, those in consecrated life and lay, are part of these Councils and meant to collaborate in the deepening of formation of each member both initial and on-going.

The General Coordination Council and the General Councils of the Core Communities collaborated with one another in the preparation of a request to the Holy See for the erection of the UAC as an international public association of the faithful and for approval of the General Statutes. The UAC was required to provide a canonical justification regarding the competency of the Pontifical Council for the Laity as the proper dicastery of the Holy See to attend to these matters.³⁸ The canonical justification was necessary since the UAC has a co-equal membership composed of clergy, those in consecrated life and laity. Leadership in the UAC can come from any of these states of life. Since the majority of the members of the UAC are lay and since the UAC is somewhat similar to ecclesial movements

³⁸ Union of Catholic Apostolate, *The Charism of St. Vincent Pallotti: Origin, Development, Identity*, 8.

which do fall under the competency of the Pontifical Council for the Laity, then it should be the proper dicastery for matters regarding the UAC.³⁹

Part of the canonical justification underscores collaboration in the apostolate as the competency of the Pontifical Council. The justification notes,

The PCL [Pontifical Council for the Laity] is dedicated to the collaboration of the laity in the exercise of the priestly, prophetic and kingly ministry (Art. 133 § 2 PastBon in conj. with c. 204 § 1). The collaboration of the apostolic workers is, from the beginning, also the core concern of the Union, which again allows it to stand in close relationship with the field of activity of the PCL.⁴⁰

A Decree of the Pontifical Council for the Laity given on October 28, 2003 erecting the UAC as an “International Public Association of the Faithful of Pontifical Right” and approving the General Statutes *ad experimentum* echoes this theme of collaboration and communion.

The Decree states that

[s]ince its beginning, the *Union of Catholic Apostolate* has been composed of laity, clergy and religious, and with constant growth over the years it has expressed itself in diverse communities of the faithful of every state and condition of life, desiring to fashion their own vocation according to the apostolic ideals of the Founder. Such a sharing of the same charism assumes a necessary distinction and complementarity among the different states of life in ecclesial communion.⁴¹

One hundred sixty-eight years after its founding the idea of St. Vincent Pallotti of a co-equal association of clergy, religious and laity collaborating with one another in prayer, spiritual growth and apostolic works came to full approbation by the Universal Church. The movement toward approbation moved forward continuously in the two decades prior to this

³⁹ Ibid., 73-74.

⁴⁰ Ibid., 74.

⁴¹ Ibid., 6.

approbation. Much of the development of the UAC during this time was guided by Father (now Bishop) Sèamus Freeman, S.A.C. Freeman became a member of the General Council of the Society of the Catholic Apostolate in 1982 and was elected Rector General in 1992. He served as the first President of the Union of Catholic Apostolate from 2000 until 2009. His role and writings regarding the development of the UAC and specifically the concept of “collaboration from the beginning” will be explored more fully in the next chapter.

CHAPTER THREE

UAC ECCLESIOLOGY OF COLLABORATION

The over two hundred year span through the life of St. Vincent Pallotti and the development of his seminal idea, the Union of Catholic Apostolate, shows a growth in understanding by the Church and by the communities founded by him of the collaborative nature of the UAC. Collaboration is at the heart of UAC ecclesiology. It is the lived expression of *communio*. In the UAC, the collaborative stance moves beyond simply skills and technique, it embraces an understanding of the Trinitarian nature of God and our cooperation with our God, a differentiation of roles and tasks symbolized by the Holy Family and opportunities for prayer and discernment symbolized by the Upper Room or Cenacle.

The contemporary expression of the UAC is born out of the experience of the Second Vatican Ecumenical Council and ecclesial developments subsequent to the Council. In UAC literature, however, there is a tendency to examine the UAC simply through study of the works of Pallotti and through review of documents emanating from the UAC, either those of the religious communities or those written for the Union as a whole. While significantly important, such a limited scope of study can be myopic. As shown in the previous chapter, the UAC as an association encompassing laity, religious and clergy, did not have a continuous history from 1835 onward. In fact, prior to Vatican II most of the development, while excellent and necessary, was at the same time separated and fragmented. The contemporary expression of the Union is a post-Vatican II development, particularly from the 1980's onward. In fact, the fullest contemporary realization of the UAC with universal

Church approbation did not occur until 2003. This expression of the UAC is rooted in an ecclesiology that is of Vatican II, but through a unifying concept that came to full articulation some twenty years after the close of the Council.

The ecclesiological concept that came to prominence at the time of the development of the contemporary expression of the UAC in the 1980's is called *communio*. This concept and allied ones of co-responsibility and especially collaboration offer an optic through which one can view the UAC in its contemporary form. The work of Sèamus Freeman during this period affected the way in which the UAC views collaboration and the connection of this concept with the understanding of St. Vincent Pallotti. In order to grasp the developments that occurred, it is important to review what Pallotti himself understood about collaboration or, in his parlance, "cooperation."

"Holy Cooperation"

The concept of collaboration within the Union of Catholic Apostolate grew from the understanding of St. Vincent Pallotti on what he termed "holy cooperation." While the term "collaboration" is commonly used in Pallottine circles today, Pallotti himself did not use this term, but his understanding of "cooperation" informs the contemporary concept of "collaboration" in the literature of the UAC.⁴² The similarities between Pallotti and the ecclesiological concept of *communio* as understood by the contemporary *Magisterium* of the Church are striking.

⁴² Stanislas Stawicki, S.A.C., *La Cooperation Passion d'une Vie* (Kigali, Rwanda: Pallotti Presse, 2004), 344.

The spiritual images of the Trinity, the Holy Family at Nazareth and the Cenacle are the means by which Pallotti expresses his understanding of collaboration. Fr. Stanislaw Stawicki, S.A.C. in his comprehensive work on Pallotti and cooperation or collaboration called *La Cooperation Passion d'une Vie* provides a compelling argument that these three spiritual images form the basis of Pallotti's ecclesiological stance. This stance is that

Church is not primarily composed of structures, but people united in faith and love. The Church is born and the fact remains that the Lord is communicated to people, enters into cooperation with them and thus leads to cooperation between them. That is why, for Pallotti, Church is a network of cooperation.⁴³

Pallotti does not ground his understanding of cooperation in simply human relating. Instead, the Holy Trinity for Pallotti is the source of cooperation among human beings. The mysterious relationship of love between the Father, Son, and Holy Spirit is symbolic of cooperation. The relating between the persons of the Trinity, Pallotti considers a conversation or what he terms an “eternal communication.”⁴⁴ God desires to communicate this love to God's creation. The UAC document for the bicentennial of Pallotti's birth in 1995, *Memory and Prophecy*, summarizes his view when it states,

The image of God self-communicating in love is to be found many times in the writings of Vincent Pallotti: the communication of the life of Jesus, the communication of the merits of Jesus, of the Mother of God, of all the Saints and the entire Church. Vincent Pallotti's total conviction of this communication of God is very clear from the following text: “My God, my infinite mercy, ... infinitely communicable in every moment..., you, because you are infinite Goodness, love to

⁴³ Ibid., 350.

⁴⁴ Vincent Pallotti, *Scritti Spirituali*, vol. XI of *Opere Complete*, edited by Francesco Moccia, S.A.C. (Roma: Curia Generalizia della Società dell'Apostolato Cattolico, 1980), 24.

communicate yourself infinitely; and where there is more misery there you find even greater capacity to communicate.⁴⁵

Pallotti does not see this self-communication in love as simply a passive act on the part of human beings. The human person responds to this communication from God, through cooperation with God, particularly in the “salvation of souls.” This cooperation leads the person into a greater alignment with the image of the Holy Trinity in whose likeness the human person is created. The human person becomes more like God through cooperation with the Trinity. Pallotti summarizes his view when he says,

Consider my soul, that the gift to cooperate in the salvation of souls, of all people, is the most divine because he who profits commendably perfects himself in the image of the Holy Trinity, which makes him more like God.⁴⁶

Cooperation between human persons and the Trinity provides the vertical axis for Pallotti’s understanding of collaboration. For the horizontal axis of collaboration, or human person with human person, Pallotti moves to two other spiritual images, the Holy Family at Nazareth and the Cenacle.

The Holy Family provides an example of how the members of the Union of Catholic Apostolate should function collaboratively and co-responsibly with one another. Pallotti offers an image and a meditation on this form of cooperation when he states,

⁴⁵ Union of Catholic Apostolate, *Memory and Prophecy of the Union of Catholic Apostolate* (Rome: Union of Catholic Apostolate, 1993), 23.

⁴⁶ Vincent Pallotti, *Cerimoniali*, vol. VIII of *Opere Complete*, edited by Francesco Moccia, S.A.C. (Roma: Curia Generalizia della Società dell’Apostolato Cattolico, 1974), 257.

In the Holy Family at Nazareth service to God and prayer alternated with the laborious work of a carpenter and other duties necessary for earning a living. Laziness was unknown. Hence, every form of laziness must be banished from our houses. Keeping in mind the harmony and the perfect charity that characterized the home in Nazareth, everyone must try to expedite one's task in as short a time as possible. This is in the interest of brotherly and sisterly cooperation which they thus offer to the others in the duties which they have to perform; moreover, it enriches them spiritually, ensuring for them the merits of acting according to charity and obedience.⁴⁷

According to Stawicki, Pallotti saw the Holy Family as a model for functioning in charity and obedience with one another through a diversity of roles, in co-responsibility.⁴⁸

Stawicki, basing his comments on those of Sèamus Freeman in *In a Constant Search for Faithfulness*, opines that Pallotti offers a view of the Cenacle or Upper Room as the “place of universal communion.”⁴⁹ Pallotti wanted to unite with “all creatures in the Cenacle.” In the Cenacle one “learns to read the signs of the times, the needs of the Church and humanity.”⁵⁰ It is where “one receives the fullness of the Holy Spirit and the abundance of gifts necessary for effective cooperation.”⁵¹ Those in the Cenacle do not remain there,

⁴⁷ Ibid., 318.

⁴⁸ Stawicki, 423. The quotes from this statement are taken from an article by former Rector General of the Society of the Catholic Apostolate, Fr. Martin Juritsch, called “Maria, modello della missione dei laici,” ACTA SAC, XIII, 356-359.

⁴⁹ Ibid., 423 and Freeman, *In a Constant Search for Faithfulness*, n. 37.

⁵⁰ Stawicki, 423.

⁵¹ Ibid., 424.

they go forth in mission. As Freeman summarizes, “This fullness of the Spirit is the impulse to “go and make disciples of all nations” (Mt 28:19); to be where there is need to be.”⁵²

The three images provided by Pallotti of Trinity, the Holy Family at Nazareth and the Cenacle offer a Pallottine optic through which the members of the UAC can understand and live *communio*, collaboration and co-responsibility – to live as apostles. These three terms are consistently used in contemporary UAC documents. While they summarize the thought of Pallotti, they were not used by him. These terms come primarily from the period after the Second Vatican Council, which as we have seen, is contemporaneous with the development of the UAC in its current canonical form. Since these terms are so prevalent in UAC documents it is important to review their advent into contemporary magisterial teaching.

Communio, Collaboration and Co-responsibility

Collaboration and co-responsibility were significant elements of the “Final Report” of the Extraordinary Synod of Bishop of 1985. This Synod was convened to celebrate and reflect on the Second Vatican Council at the time of the twentieth anniversary of its close.

These terms are rooted in an ecclesiology of *communio*. The “Report” states,

Because the Church is communion there must be participation and co-responsibility at all of her levels. This general principle must be understood in diverse ways in diverse areas. . . [F]rom Vatican II has positively come a new style of collaboration between the laity and clerics. The spirit of willingness with which many lay persons

⁵² Freeman, *In a Constant Search for Faithfulness*, n. 37.

put themselves at the service of the Church is to be numbered among the best fruits of the Council. In this is experienced the fact that we are all the Church.⁵³

Collaboration and co-responsibility among all the baptized does not mean that there is not a diversity of roles. *Lumen Gentium* and *Christifideles Laici* offer some clarity about this diversity. The Council Fathers state in *Lumen Gentium*,

If therefore in the Church everyone does not proceed by the same path, nevertheless all are called to sanctity and have received an equal privilege of faith through the justice of God. And if by the will of Christ some are made teachers, pastors and dispensers of mysteries on behalf of others, yet all share a true equality with regard to the dignity and to the activity common to all the faithful for the building up of the Body of Christ. For the distinction which the Lord made between sacred ministers and the rest of the People of God bears within it a certain union, since pastors and the other faithful are bound to each other by a mutual need. Pastors of the Church, following the example of the Lord, should minister to one another and to the other faithful. These in their turn should enthusiastically lend their joint assistance to their pastors and teachers. Thus in their diversity all bear witness to the wonderful unity in the Body of Christ. This very diversity of graces, ministries and works gathers the children of God into one, because "all these things are the work of one and the same Spirit".⁵⁴

Pallotti and the contemporary understanding of the UAC would concur that all members need to be united with the Church and its Pastors. The UAC is "of the Church and for the Church," not for itself. It is united in the mission of the Church and each member has a role in this mission. Pope John Paul II offers insight into these roles,

[S]o as to assure and to increase communion in the Church, particularly in those places where there is a diversity and complementarity of ministries, pastors must always acknowledge that their ministry is fundamentally ordered to the service of the entire People of God (cf. Heb. 5:1). The lay faithful, in turn, must acknowledge that

⁵³ "Final Report," II.B.b.C.6.

⁵⁴ Second Vatican Ecumenical Council, Dogmatic Constitution on the Church, *Lumen Gentium*, 32.

the ministerial priesthood is totally necessary for their participation in the mission of the Church.⁵⁵

There is a diversity of roles, but the mission is one and all participate in the mission. Pallotti understood this well although he “preferred to use the Greek word, apostolate [sic], rather than the Latin word, mission [sic], even though he recognizes that both have the same meaning.”⁵⁶ For Pallotti, apostolate means that the baptized share in the one mission of Jesus Christ, to evangelize. He affirms that “in the Church of Jesus Christ those sent by the same divine Redeemer to bring the light of truth to all peoples and nations are called apostles.”⁵⁷

The UAC manual of formation that was published in 1989, *Called by Name*, expounds forcefully on this point,

All are equally called and sent. This is not just an obligation in the Church, but also the right of every baptized person. The preoccupation of Vincent Pallotti was, to demonstrate that: “The Catholic Apostolate is universal to everyone” (OCCC III, p. 139). For this reason every Christian must be an apostle: “Therefore all, great and small, rich and poor, leaders and subjects, teachers and learners, priests and lay faithful . . . can, from their particular situation in life . . . exercise . . . the Apostolate of Jesus Christ” (OCCC III, p. 146).⁵⁸

The main way then for apostolic action to occur in the UAC is through collaboration and co-responsibility. The operative type of collaboration in the UAC is “collaboration from the beginning.”

⁵⁵ John Paul II, Post-Synodal Apostolic Exhortation *Christifideles Laici* (1988), 22.

⁵⁶ Union of Catholic Apostolate, *Called by Name: Manual of Formation*, 165.

⁵⁷ Pallotti, *Appendice alla Regola*, Vol. III of *Opera Complete*, 144 as quoted in Union of Catholic Apostolate, *Called by Name*, 166.

⁵⁸ Union of Catholic Apostolate, *Called by Name: Manual of Formation*, 166.

Collaboration from the Beginning

The word “collaboration” is often used in church circles, but can carry a variety of meanings. One form of collaboration is “collaboration from the beginning.” This type of collaboration does not occur immediately when a group comes together. Formation is necessary, particularly formation in collaborative leadership. As an international public association of the faithful, the UAC is a group where collaboration is supposed to occur from the beginning. The hierarchical nature of the Catholic Church, however, sometimes does not make this form of collaboration possible. The formation of leaders who are collaborative from the beginning is necessary for the whole of the UAC to function in this way. The challenging task for formators of the UAC in the United States is to encourage a “critical conversation” on collaboration and assist the UAC in coming to a “shared vision” that can move the process forward to a greater lived expression of “collaboration from the beginning.”

Collaboration is supposed to be the core method for functioning within the UAC and is what the UAC is called to promote among the faithful. The mission statement of the UAC in its *General Statutes* is clear.

The Union of Catholic Apostolate participates in the mission of the Church to reawaken faith and an awareness of the vocation to the apostolate, to rekindle charity among all the members of the People of God, so that they be ever more united in a commitment to spread charity and so that there be, as soon as possible, one flock under one Shepherd (cf. Jn. 10. 16). Therefore, the Union, in communion with the

competent Pastors, promotes collaboration among all the faithful in openness to new forms of evangelization.⁵⁹

Sèamus Freeman has promoted a concept of collaboration that was raised in conversations at the Synod on Consecrated Life in 1994, called “collaboration from the beginning.”⁶⁰ Freeman refers to it for the first time in 1996 when as Rector General of the SAC he composed a document on the charism of the SAC. He distinguishes between “collaboration for,” “collaboration with,” and “collaboration from the beginning.” “Collaboration for” is when one person plans and decides everything and then seeks volunteers to assist in the execution of the plan. Freeman states,

The nature of this type of collaboration is the classical participation in the role of the other. The other makes all the decisions, arranges all the planning and looks for “volunteers” to help with the details. It is passive collaboration. This can be a necessary service, but is not what we mean by collaboration of all, in the Pallottine sense.⁶¹

“Collaboration with” is when the project is initiated and led by one person and then others are invited to give input. In his writings, Freeman does not elaborate much on this

⁵⁹ Union of Catholic Apostolate, *General Statutes*. (Rome: Union of Catholic Apostolate, 2003), n. 12.

⁶⁰ In a conversation with Freeman in May of 2008 he stated that he recalled that he had first heard of the concept of “collaboration from the beginning” from the intervention at the Synod given by Sr. Doris Gottemoeller, RSM, although he had not recalled her name. The intervention given on October 12, 1994 called “The Identity and Mission of Apostolic Women’s Religious Life” does have a section on collaboration but does not use or articulate the concept of “collaboration from the beginning” in the way that Freeman does.

⁶¹ Sèamus Freeman, “The Culture of Collaboration from the Time of St. Vincent Pallotti,” *Apostolato Universale* 8 (2002), 61-77.

point other than to give examples of this type of collaboration. He refers to this type of collaboration as “limited active participation.”⁶²

“Collaboration from the beginning,” though, is when all are invited to be involved in the task from the start. Individual giftedness is respected and nurtured, all are part of the analysis of the issue and make and act on decisions in a communal fashion. Again Freeman does not elaborate very much on this point. An appendix to the *General Statutes* on topic of collaboration called “Together and For One Another” notes that “this form of dialogical-communal action is characteristic for Vincent Pallotti and his foundation.”⁶³

Pallotti throughout his ministry was very clear that all are gifted by God in some way and that these gifts were meant to be shared within a collaborative effort. For Pallotti, “apostolate means journeying together and serving together.”⁶⁴ The UAC is meant to reflect this vision of Pallotti:

Significant for the Union is: Each person is unique, possesses distinctive gifts and, even if at times hidden, good will. We strive to see the good in everyone and not to give the impression that we alone are those who know, give and determine. Instead, we strive to act collegially. Whenever possible, speaking with one another, listening to one another, communal preparation, decision making and reflection are important to us. One can say: TOGETHERNESS and COOPERATION [sic] constitute the preferential options of the Union [sic]. They are a consequence of the communal image of God, and reflection of the inner-Trinitarian reality, a preview of the

⁶² Freeman, *In a Constant Search for Faithfulness*, 28.

⁶³ “*Together and For One Another – The Characteristics and the Way of the Union*,” Appendix to the *General Statutes* (Rome: Union of Catholic Apostolate, 2008), n. 11.

⁶⁴ *Ibid.*, n. 12.

heavenly community and, therefore, already evangelizing in themselves; they are the marks of our discipleship of Jesus.⁶⁵

As described earlier, the *General Statutes* utilizes the term *communio* to summarize this operative ecclesiology.⁶⁶ The idealistic language of “Together and For One Another” describes the way of being Church toward which the UAC strives.

“Together and For One Another” was approved by the General Coordination Council of the UAC in May of 2008 as a supplementary document to the *General Statutes* which focuses specifically on collaboration. The document expands on the concept of *communio* and also specifically reviews how St. Vincent Pallotti viewed collaboration and how it is operative in the UAC. It also places the views of Sèamus Freeman on collaboration in an official document of the UAC.⁶⁷

According to the text in numbers 9 and 10, Pallotti viewed collaboration as two fold: “with God” and “with our neighbors.” Collaboration “with God” is the movement of the human person engaged in the works of God that promote evangelization, human unity, and apostolic outreach. The document affirms that,

The Triune God envelopes, animates and directs everyone and everything. On his own, the human being can neither believe nor love, he is not capable and willing to become active in the apostolate. On our communal way of salvation we can only develop and take up that which the Holy Spirit has already planted in us and our fellow human beings as soil and seed. Thus, we work together with God when we

⁶⁵ Ibid., n. 13.

⁶⁶ Union of Catholic Apostolate, *General Statutes*, n. 1.

⁶⁷ Union of Catholic Apostolate, “*Together and For One Another – The Characteristics and the Way of the Union*,” Appendix to the *General Statutes*, n. 11.

e.g., enliven faith, hope and love, which are rooted in baptism; awaken apostolic co-responsibility; strengthen the willingness for engagement for the *missiones ad gentes*; draw awareness to the charisms and animate them; reconcile with one another; support the growth of an ever deeper unity among all Christians; foster dialogue with non-Christians; share love with all people.⁶⁸

The examples that are listed are taken directly from the *General Statutes*, primarily numbers 13 through 16 and 20, which describe what the UAC wishes to do. The description given is very expansive and is typical of the wide-ranging nature of the UAC.

While collaborating with God, the human person is also collaborating with neighbor. The works are expansive and so are the people who are collaborators because, “for Pallotti the neighbor is everyone who is able to recognize God and to love, be they friend or foe, Catholic or non-Catholic, pagan or atheist, Christian or Jew, fellow citizen or foreigner from some other nation.”⁶⁹ For Pallotti and, therefore, for the UAC, each person is of equal dignity because all are formed in the image and likeness of God.

As “a divine image” each person has his own special abilities (1 Cor 12, 7-11); the Holy Spirit works in everyone, often surprisingly and in unforeseeable fashion (Jn 3,8). Therefore, it is necessary to see in each person a partner of equal value, who is loved by God as I am and who is on the road toward him together with me. I can receive a divine message and be enriched by everyone. Each person challenges me to help carry his burden.⁷⁰

Even though collaboration with God and with neighbor is expansive, the UAC must collaborate with others in achieving its ends. The UAC is not meant to do everything, but to

⁶⁸ Ibid., n. 9.

⁶⁹ Ibid., n. 10.

⁷⁰ Ibid.

collaborate in ways that will assist in greater collaboration with God. “Together and For One Another” is very clear on this point when it states,

The relationship of the Union to other agents of the apostolate must also be determined by “collaboration from the beginning.” The Union respects the diversity of God given vocations in the Church, fosters them and helps them to orientate themselves toward the common goal. In accordance with the warning “Test everything, keep what is good” (1 Thes 5,21), it is intent not to displace, hinder or duplicate the apostolic initiatives, groups or institutions already present in the Church, but rather to support them and join them together. Founded as an “auxiliary corps” in the Church and for its worldwide mission, the Union in all its apostolic endeavors preserves the communion with the competent ecclesiastical authorities and seeks to always proceed in agreement with them.⁷¹

The UAC sees its mission and the work of its members as of the Church and for the Church as a collaborative partner.

“Together and For One Another” does not envision a member of the UAC to know and understand collaboration, particularly “collaboration from the beginning,” immediately upon entrance into the UAC. The final number of the document clearly states,

The ability to collaborate with God and neighbor always and everywhere is a life long learning process. The willingness, competence and perseverance required for this must be patiently prayed for as well as intensively practiced and fostered in education and on-going formation.⁷²

Formation in collaboration is, therefore, central to the overall life of the UAC and if done well will assist in the realization of a lived ecclesiology of collaboration with God and with neighbor. Aside from “Together and For One Another,” there are very few sources that discuss collaboration in the UAC. One source comes from a formation document of the SAC

⁷¹ Ibid., n. 15.

⁷² Ibid., n. 18.

called the *Ratio Institutionis* and another source is a few thoughts on the matter given in a presentation by Sèamus Freeman to formators in the Core Communities.

The *Ratio Institutionis* of the SAC, a document which outlines initial and on-going formation in the SAC, also describes how collaboration should function for members of the SAC and within the UAC,

From the very beginning of our foundation we have been called to co-operate with God and among ourselves: “All [persons] must be so united that one watches over the other, and continually motivates the other, so that no one loses force of will, suffers lessening of zeal, or experiences cessation of works.” In other words, we are not solitary apostles. The *lone ranger* is dangerous and foreign to Pallottine identity. Vincent desired a Union of Catholic Apostolate that is a *communion* of different gifts and diverse vocations. Consequently, our times should see us committed more than ever to making the most of and developing the fields and means which serve to make the Church and our Union *houses of communion and schools of co-operation*.⁷³

The terms “collaboration” and “co-operation” are often used interchangeably in UAC writings. The movement in orientation from solitary to communal requires a good formation in collaboration. Collaboration as a central aspect of Pallottine spirituality is clear. What is not clear in the UAC are the principles of formation in and living of collaboration.

Freeman offers four principles for formation in collaboration; 1. collaboration depends on dialogue; 2. collaboration is a mutual encouragement; 3. collaboration requires perseverance; and 4. collaboration requires models that promote and protect a spiritual and apostolic culture.

⁷³ Society of the Catholic Apostolate, *Ratio Institutionis of the Society of the Catholic Apostolate* (Rome: Society of the Catholic Apostolate, 2004), n. 77.

Dialogue in Freeman's understanding is actually "trialogue" or a conversation between two parties and also God. He draws on the way in which ecumenical dialogue is conducted as the means by which collaborative "trialogue" can occur.⁷⁴ Mutual encouragement occurs through the interrelation of the various states in life within the UAC. Freeman underscores his point when he refers to number 7 of the *General Statutes* which states,

The equal dignity of the members of the Union is founded on their common likeness to the Creator and on the common priesthood of the People of God. This is expressed in a plurality of vocations to the life of the lay faithful, to consecrated life and to the ordained ministry which are all so interrelated that each helps the other to be solicitous for continuous growth and to offer its own specific service.

The collaborative "trialogue" requires perseverance in the midst of challenges. As Freeman notes,

Collaboration means suffering; a profound expression of Christian humility is required; collaboration is a real trial of our sincerity; in times of trial we need to invest more energy, zeal, and love; the exercise of humble charity is the true distinguishing quality of the true follower of Jesus Christ.⁷⁵

Finally, as described in greater detail above, Freeman sees two images offered by Pallotti as feasible models for formation in collaboration, the Cenacle and the life of the Holy Family at Nazareth. As a model for a lived ecclesiology these images, along with Pallotti's understanding of the Trinity, can be seen as a combination of collaborative prayer, reflection and action, essential elements in a formation program. Good formation in this model can

⁷⁴ Freeman, "The Culture of Collaboration from the Time of St. Vincent Pallotti," *Apostolato Universale* 8, 73-75.

⁷⁵ *Ibid.*, 74-75.

lead to co-responsibility among the baptized, which is the overall goal of the UAC. The first number of the *General Statutes* states that members of the UAC are “to promote the co-responsibility of all the baptized to revive faith and rekindle charity in the Church and in the world, and to bring all to unity in Christ.”

Those who are formed in this ecclesiology that is both that of St. Vincent Pallotti and that of *communio*, will not be making little groups of lay people who are under the direction of the Core Communities. Instead, the UAC will provide for both its members and all the faithful formation as apostles so that they, united with the mission of the Church, can “reawaken faith and an awareness of the vocation to the apostolate, to rekindle charity among all the members of the People of God, so that they can be ever more united in a commitment to spread charity and so that there be, as soon as possible, one flock under one Shepherd,” Jesus Christ.⁷⁶

⁷⁶ Union of Catholic Apostolate, *General Statutes*, n. 12.

CHAPTER FOUR

COLLABORATION SESSIONS: THEORETICAL CONSIDERATIONS

The leadership structure as outlined in the *General Statutes* of the UAC underscores a “collaboration from the beginning” model. In fact, the structures at the local, national, and international levels are simply meant to be aids to collaboration for the members.⁷⁷ The appendix of the *General Statutes*, “Together and For One Another,” expounds on this further:

Preferred and exemplary places of collaboration from the beginning should be the Coordination Councils of the Union. Their motto is: Praying, seeing, judging and acting together. They possess no ecclesiastical authority (jurisdiction). They realize their task in the Union in that they inspire, motivate, encourage and inform.⁷⁸

This way of functioning for leadership is not typical in the Church. Normally, collaborative leadership in the Church, when it is present, is characterized more by “collaboration for” (the leader or other group member makes the decisions about the project and others volunteer) and “collaboration with” (the leader or other group member proposes a project, the group discusses and modifies the idea and then others are invited to assist) rather than “collaboration from the beginning” (all are involved in the development of project ideas and implementation). Leaders in the UAC as well as in the Core Communities will need to understand and to share in the vision of “collaboration from the beginning” if progress in this way of leading is to be made.

The starting point for the development of a “shared vision” will be the Formation Committee of the United States National Coordination Council (USNCC) of the Union of

⁷⁷ Ibid., nos. 22-66.

⁷⁸ Union of Catholic Apostolate, “*Together and For One Another – The Characteristics and the Way of the Union*,” Appendix to the *General Statutes*. 14.

Catholic Apostolate (UAC). All of the members of this committee are members of the USNCC, which is the leadership body of the UAC in the United States. This committee is a significant place for the “critical conversation” on collaboration to begin.

As Thomas Hawkins, who has adapted adult learning and leadership theory to congregational ministry, points out, “team learning is at the intersection of individual and organizational learning.”⁷⁹ Once the critical conversation begins in earnest, it can be extrapolated out to a larger conversation and hopefully result in a shared vision that embraces “collaboration from the beginning.”

Collaboration Within the Context of Adult Faith Formation and Team Learning

A common understanding of a “shared vision” on “collaboration from the beginning” cannot be gained by UAC leaders in one conversation or without conflict. Adults come to a group with their own life experiences and learning. How does a group begin such a “critical conversation?” The term “critical conversation” is addressed in the work of Jane Regan, who has taken the theory of adult learning and applied it to Catholic faith formation.⁸⁰ By “critical conversation,” Regan is not referring only to “content,” but “the focus is also on the presumptions or perspectives that make that content meaningful and significant.”⁸¹

⁷⁹ Thomas Hawkins, *The Learning Congregation* (Louisville, KY: Westminster John Knox Press, 1997), 71.

⁸⁰ Jane Regan, *Toward an Adult Church: A Vision of Faith Formation* (Chicago: Loyola Press, 2002), 131.

⁸¹ *Ibid.*, 137.

Regan bases her assumptions on conversation as a key aspect of adult faith formation on the work of Hans-George Gadamer on hermeneutics, Jack Mezirow on transformative learning, and Peter Senge on learning communities.

A “critical conversation” has three characteristics, pre-understanding, understanding, and openness to changing one’s beginning understanding. Pre-understandings are the thoughts and beliefs a person comes with prior to the “critical conversation.” Understanding comes when the person in conversation is willing to acknowledge and truly grasp the view of another. The final phase is openness to changing one’s view.

The example of collaboration will be used as a way to concretize the theories of Regan on the effects of a “critical conversation.” In a “critical conversation” on collaboration each person comes to the table with their own particular stance about collaboration. His or her life experience will offer personal insights into what this particular word means when used in a Church context. Some may have only a “collaboration for” experience, others might have this and a “collaboration with” experience, and still others might have a “collaboration from the beginning” experience. The experiences of each person in the conversation about collaboration may be negative or positive.

An assumption that each person means the same thing by collaboration will probably result in the parties to the conversation simply talking past one another. Time needs to be taken in a group to explore what these pre-understandings are and this leads to the second phase of critical conversation.

In a conversation where there is an honoring of each person's contribution there is the opportunity to come to understand more deeply what each person in the group understands as "collaboration." The purpose of the conversation is not to establish one's own point in order to have others assent to it. Critical conversation is not an exercise in debate, but in deeper understanding. Regan notes that "while in conversation, my first responsibility is to understand the other and assist the other in understanding me."⁸² Many times this is not an easy process since people naturally will want others to agree with their particular point of view. Conflict will sometimes occur at this stage, but this should not deter the process. This is a necessary step and enhances the process toward understanding.

Conversation when approached in the way outlined above can be transformative for those in a "genuine conversation." Where there is openness on the part of all concerned to the possibility of changing one's point of view, transformation is likely to occur.⁸³ The stance of openness is the critical element rather than simply changing one's view in order to be accepted by the other or as a way to avoid conflict. In critical conversation on collaboration, if one or another partner in the conversation acquiesces to what another believes about collaboration either through coercion or a desire to avoid conflict, then it will undermine the whole process of becoming more collaborative.

⁸² Ibid. 134.

⁸³ Ibid., 134-135.

Regan also posits that such conversation “needs to be sustained, critical, and marked by mutual respect and trust.”⁸⁴ Sustained conversation offers the opportunity to truly explore the issue and allows for a significant exchange of ideas.

One of the important results of a sustained conversation is that we are able to move beyond the first level of common understanding and polite agreement and truly engage with the differences that are present in any community of faith. In sustained conversation, we have the opportunity to encounter the “otherness” in those with whom we converse. Sustained conversation allows the participants to move through a series of phases that can be described in this way: (1) We use the same words so we must mean the same thing – we have a lot in common; (2) She (or he) uses similar words to mean a very different thing – we have nothing in common; (3) She (or he) uses words to convey the convictions and values that shape his (or her) view of the world – we have much to share and learn from each other.⁸⁵

Sustained conversation does not usually occur one time, but is returned to whenever there is need to deepen understanding.

A sustained conversation that is critical is not simply about what the parties are talking about (content) or how the conversation is done (process) but what it means for the parties.⁸⁶ Regan notes,

Critical conversation moves the focus to the reason, or premise, why the conversation is important. Why is this relevant? In responding to these questions, the conversation enters into the dynamics of transformative learning, in which the meaning perspectives of those involved are named and examined. It is often in conversation with those whose views of the world are different from our own that we can begin to recognize the distortions in our own meaning perspective.⁸⁷

⁸⁴ Ibid., 135.

⁸⁵ Ibid., 136.

⁸⁶ Ibid., 137.

⁸⁷ Ibid.

Finally, a change in one's perspective as a result of a sustained, critical conversation requires dedication to the process. The atmosphere for the conversation to occur must be one where there is good regard for one another and for the process. Hidden agendas and manipulation have no place in this type of conversation. As Regan clearly points out, "the critical conversation and transformation of meaning can take place only in a context of mutual respect and trust."⁸⁸

Hawkins calls this type of "critical conversation" by another name, "dialogue." He sees a distinct connection between such dialogue and conversion or in Regan and Mezirow's parlance, "transformation." The new learning changes the perspective of the learner.

Hawkin's writes,

Dialogue, then, is not just something we do as we prepare for other, more important, tasks or ministries. Dialogue itself forms and transforms individuals within a people of God. Dialogue and mutual inquiry promote critical, liberating reflection on our assumptive frameworks. In this sense, there is a close relationship between conversation and conversion.⁸⁹

This particular "critical conversation" or dialogue on the issue of "collaboration from the beginning" and a re-imagining of leadership will not simply occur once nor will the issue be closed. Formation of adults is not a didactic process in which adults simply accept the data given or the process by which it is given. Adults need to be a part of the process from beginning to end, not as passive receptors, but as active agents. Their experience needs to be

⁸⁸ Ibid., 138.

⁸⁹ Hawkins, 100.

honored and welcomed.⁹⁰ The honoring of the experience of each person in the process of formation is an expression of an awareness of the unique giftedness that each person brings.

Loughlan Sofield and Carroll Juliano, who have written and presented often on the issue of collaboration in Church-based organizations, point out that, “logically, then, any group wishing to initiate a collaborative project would begin with a discernment of gifts.”⁹¹

When a group comes together only some of the gifts within the group may be known or there might be pre-conceived notions about the types of gifts that are present. They posit,

One of the distinguishing aspects of true collaborative ministry is that it is *based on gift*. Any group that wishes to minister collaboratively must seriously engage in an ongoing process of gift discernment and acquire mechanisms to fully employ those gifts in a common mission.⁹²

The process that leads to greater collaboration does not end with a discernment of gifts, according to Sofield and Juliano, but with “an affirmation and respect of those gifts.”⁹³

They note that this can be difficult to do at times.

This [affirmation and respect of those gifts] can be a real area of challenge, for it is not always easy to affirm the gifts of other people, especially the gifts that are most different from one’s own. Our experience has shown that it is this lack of mutual respect which often erodes collaborative efforts.⁹⁴

⁹⁰ Regan, 104.

⁹¹ Loughlan Sofield, ST and Carroll Juliano, SHCJ, *Collaboration: Uniting Our Gifts in Ministry* (Notre Dame, IN: Ave Maria Press, 2000), 67.

⁹² Ibid., 33.

⁹³ Ibid.

⁹⁴ Ibid.

The ultimate goal of the discernment and affirmation of gifts is a “release” or movement outward from each person to the group in collaborative effort.⁹⁵

This type of affirmation and release of gifts is similar to what Vincent Pallotti intended for the Union of Catholic Apostolate. The commentary “Together and For One Another” states,

Pallotti held the lifelong conviction: Apostolate means journeying together and serving together. He felt himself impelled, together with as many others as possible, to respond to God’s love and to invite all to do likewise. He treated no one as a mere recipient, student or beginner, as images of God every man, every woman, was for him a partner who had something to say to him and with whom he sought to cooperate. He was convinced that a joint action can mobilize immeasurable reserves of strength in order to realize the Church as *communio* in which the equal dignity of all is brought to bear.⁹⁶

Pallotti believed that he could learn something from the giftedness of everyone with whom he worked. He understood that he did not personally embody all of the giftedness within his collaborative group called the UAC and was willing to learn from and encourage those who had different gifts.

Donna Markham, a theorist on the role of organizational leadership, does not use the language of “gifts” since she is writing for an audience that is broader than church-based organizations. Her approach to acceptance of different gifts within a collaborative group is similar to Sofield and Juliano, but also notes some of the possible tensions that might occur. Markham notes,

⁹⁵ Ibid., 34.

⁹⁶ Union of Catholic Apostolate, “*Together and For One Another – The Characteristics and the Way of the Union*,” Appendix to the *General Statutes*, n. 12.

On a practical, observable level, a collaboratively functioning group is notable by its lack of interpersonal defensiveness and judgmental attitudes among colleagues. Persons are free to be themselves. Within an inclusive phase group, it is common for people to refrain from exhibiting highly creative or brilliant ideas for fear of not being seen as “one of the bunch.” Persons tend to squelch their individuality and compromise their assertiveness in efforts to be included and accepted; they are not being true to themselves. Likewise, in a group in the midst of confrontation issues, colleagues’ apprehensions about being perceived as less authoritative or definitive may lead them to an overly aggressive, interpersonal itchiness as they relate with one another. This may not necessarily be representative of their truest relational style, either. In the collaborative work group, colleagues have grown to trust one another by having dealt with and survived less-comfortable situations that surfaced during the prior developmental phases.⁹⁷

Even when there is appreciation and acceptance of difference, collaborative groups will still experience conflict. In fact, Sofield and Juliano would contend that “collaboration is only possible when individuals have the courage to acknowledge, confront, and deal directly with conflict.”⁹⁸ As will be shown in the next section Sofield and Juliano, Markham and pastoral theologians James and Evelyn Whitehead have complementary views regarding the role of conflict in collaborative groups.

Moving Through Conflict

Most people innately avoid conflict. This trait is especially true of people in Church-based groups. There is something that seems decidedly un-Christian about being in conflict with others. Christians should love others and translated into group work this becomes equated with peaceful dialogue that leads to consensus. The national leadership of the UAC,

⁹⁷ Donna J. Markham, *Spiritlinking Leadership: Working through Resistance to Organizational Change* (New York: Paulist Press, 1999), 104-105.

⁹⁸ Sofield and Juliano, 126.

as with any collaborative group, often deals with the issue of conflict within its work. Like some Church based groups, conflict within the UAC is often exhibited in passive-aggressive ways. The motto of the UAC, taken from St. Paul, is: “the love of Christ impels us.”⁹⁹ Love means for some avoiding overt conflict with another. This stance results in consensus that becomes passive compliance, non-compliance through apathy, or manipulation of decision-making from behind the scenes.

Markham would question if such consensus is really an agreement of all parties or simply a way of keeping the peace. Rushing to resolve conflict that naturally erupts in a group may lead the group to limit the possibilities for consideration. The group could easily overlook or reject some aspect under consideration which they might come to accept if the conflict is managed well. Markham posits,

Conflict resolution assumed that most, if not all, conflictual situations were problematic and destructive and that what was needed was a methodology to restore peace. This led many groups to an overreliance on a primitive understanding of the use of consensus and often put closure on problem solving before the best solutions were identified. Early conceptualizations of consensus suggested that consensus was reached when everyone could “live with” the decision. Moreover, it frequently led to a watered-down conclusion that held little passion for implementation. This, in turn, left leaders puzzled by the lack of ownership and the inability to actualize decisions that had been made precisely because persons settled on a resolution that everyone could live with but that held little excitement or passion for anyone.¹⁰⁰

The goal of “collaboration from the beginning” is that members of the group will be willing to enter into the process, offer their unique gifts and input and move through conflict to a

⁹⁹ 2 Corinthians 5:14

¹⁰⁰ Markham, 14-15.

“shared vision.” Arriving at simply a consensus is not acceptable in “collaboration from the beginning.”

Sofield and Juliano offer five points which provide insights into a positive view of conflict within collaborative groups: (1) “Conflict is inevitable in the Christian community” (2) “Conflict is never easy” (3) “There is a difference between conflict management and conflict resolution” (4) “Conflict which is confronted and managed or confronted and resolved leads to group cohesion” (5) “Conflict which is not managed or resolved leads to pain for the individual and death to any collaborative efforts.”¹⁰¹ Addressing each of these in detail will assist in further understanding this more positive view of conflict.

*“Conflict is inevitable in the Christian community.”*¹⁰² Conflict has been seen as a type of evil within Christianity. Good Christians should not be in conflict, but should be willing to accept and love others. The love of Jesus Christ was a challenging love that moved people to become more than they were. James and Evelyn Whitehead believe that conflict should be seen as a virtue. They write,

Virtue combines vision and practice. We must first develop a vision that appreciates conflict’s meaning and recognizes its potential. Then we must develop the strategies, the practical skills, to make this vision real.¹⁰³

¹⁰¹ Sofield and Juliano, 124-127.

¹⁰² Ibid. 124.

¹⁰³ Evelyn Eaton and James D. Whitehead, *The Promise of Partnership: A Model for Collaborative Ministry* (Lincoln, NE: iUniverse.com, Inc., 2000), 187.

Conflict as a virtue does not mean that a group will set out looking to be in conflict with one another. Within a “critical conversation” as the pre-understandings of others come to the fore and there is a move toward greater understanding on the part of all, the likelihood of there being conflict will rise.

*“Conflict is never easy.”*¹⁰⁴ Normally, conflict is avoided at all costs. When it does arise one of the many ways that some people deal with it is by one party in the conflict acquiescing to the other party. Conflict will bring a degree of messiness into the endeavors of a group, but this disorder is necessary. The messiness is much like cleaning out a very full and disorganized closet. Those who avoid conflict will take the easy route and simply keep the closet door closed so that they do not have to look at the disorder. Those who choose to accept the task of entering into, emptying out, and reorganizing the closet have a task that is not easy, but one that will most likely reveal materials that are buried and that could bring something renewed to the life of the owner. Emptying the closet can be done quickly with everything being thrown away, but the more fulfilling task is when time is taken to review and examine each object removed and deciding what remains and what is discarded.

Conflict, similar to the disorganized closet, is not easy and does not have to be an exercise in discarding or destruction. Markham sees it as an opportunity.

An erroneous yet quite pervasive cultural and emotional equation prevails that equates all experiences of conflict with destruction. Excellent leaders refute this equation as they take fear out of healthy conflict; that is, they promote respectful debate and encourage different perspectives and insight. While aware that there are those times of threatened organizational polarization when consensus strategies are

¹⁰⁴ Sofield and Juliano, 124.

appropriate, they shy away from overreliance on a consensual posture that offers resolutions that everyone can simply tolerate. Spiritlinking leaders set the stage for the surprise of synergy.¹⁰⁵

*“There is a difference between conflict management and conflict resolution.”*¹⁰⁶ The leader of the group that Markham describes above is not quickly resolving conflict in the hope that it will go away, but is instead managing the conflict in the hope that deeper learning will occur between group members. Conflict management is seen by Sofield and Juliano as the “realistic” approach to conflict within a group.¹⁰⁷ While it would be nice for all conflict to be resolved, the “realistic” approach would encompass four elements that could manage it when it erupts in a group: (1) “acknowledge the presence of the conflict,” (2) “define the cause,” (3) “make decisions,” (4) “defuse the emotion.”¹⁰⁸ Numbers one, three, and four are rather self-explanatory. Number two, “define the cause,” will be more difficult to do since sometimes the presenting issue that the conflict appears to be about will have nothing to do with the actual reason why a person might object to something raised in the group. Sofield and Juliano note that “the most frequent causes of conflict are: threat to basic need, poor communication, unfinished, unconscious personal development issues, and loss.”¹⁰⁹

¹⁰⁵ Markham, 15-16.

¹⁰⁶ Sofield and Juliano, 125.

¹⁰⁷ Ibid.

¹⁰⁸ Ibid., 130.

¹⁰⁹ Ibid., 131.

*“Conflict which is confronted and managed or confronted and resolved leads to group cohesion.”*¹¹⁰ Some people have moved through times of conflict in a friendship that have resulted in that relationship being deeper. Others have experienced the destruction of a relationship due to conflict. People bring those experiences into a collaborative group. If the group has developed ways of dealing with the conflict and it is managed well, then the group itself will be stronger. The Whiteheads dismiss this process as simply the leader’s responsibility:

As tension mounts in our meetings, we politely wait for the leader to do something about it. Some leaders succumb to this heroic expectation, but the smart ones do not. An effective leader sees to it that the group has an effective procedure of conflict management in place *before* conflict arises and that the group holds itself – individually and collectively – accountable to the process when conflicts actually occur. In many settings the group members themselves develop the procedure that works best.¹¹¹

Such actions lead to a greater commitment to one another and the process. As the Whiteheads note, “conflict disrupts – but it also galvanizes a group, renewing commitment and energizing participation.”¹¹²

*“Conflict which is not managed or resolved leads to pain for the individual and death to any collaborative efforts.”*¹¹³ Members of a collaborative group that does not manage

¹¹⁰ Ibid., 126.

¹¹¹ Eaton and Whitehead, 190.

¹¹² Ibid., 181.

¹¹³ Sofield and Juliano, 127.

conflict well may have objections that they do not raise or may have become alienated as an outsider and dissenter within the group. Either way they are pushed to the periphery by the group that does not want to manage conflict in a way that leads to greater group cohesion. The group will then begin to come apart within since the unique giftedness of some of the members is not affirmed and there is not an atmosphere that engenders trust. When such affirmation and trust are present during times of conflict greater and deeper learning occurs for the individuals within the group and for the group as a whole. The Whiteheads note,

Experiencing conflict is one of the ways we become aware of the boundaries of our own moral stance. . . Challenged in this way, we can turn our efforts simply to self-defense. But staying open to the give-and-take of the confrontation may show us both the strengths and the limits of our current position. A community's moral perspective broadens as we learn to welcome alternative views and appreciate plural values. And many of us learn this best in the crucible of conflict.¹¹⁴

“The crucible of conflict” according to the Whiteheads occurs within the activity of a group. When conflict is managed well within a collaborative group, then learning occurs for all. Greater positive management of conflict as outlined above could assist the national leadership of the UAC as a collaborative group and lead to a greater appreciation of the giftedness of all. Deeper learning from each other as partners could also occur, as Pallotti intended.

A collaborative group can also be called a team in the best sense of the word.

Hawkins is clear that team learning is a collaborative endeavor. He writes,

Teams are crucibles for learning. Through the give-and-take of dialogue, people cease being passive consumers of information. They create a collaborative

¹¹⁴ Eaton and Whitehead, 180.

community that actively constructs new knowledge. Group members learn in continuous, almost random, fashion as they discuss common problems, exchange ideas, and work to achieve shared goals.¹¹⁵

Dialogue Toward a Shared Vision

The dialogue or “critical conversation” within a collaborative group moves the group closer to a “shared vision.” A collaborative group that is engaged in team learning through such dialogue does not simply happen when the group comes together. According to Hawkins, five processes are interrelated with four phases of team learning. The five processes of team learning are framing, reframing, integrating, experimenting and crossing boundaries.¹¹⁶ The four phases of team learning are fragmented learning, pooled learning, synergy, and continuous learning.¹¹⁷

The five processes function in a circular way as the learning group begins to address issues. Each person will come to the group with a particular way in which they contextualize an issue. This is the “frame” that they put around it. The frame is based on the previous experience of team members, the “fragmented learning” of each person who is a part of the team.¹¹⁸

¹¹⁵ Hawkins, 101.

¹¹⁶ Ibid., 107-114.

¹¹⁷ Ibid., 116-119.

¹¹⁸ Ibid., 117.

Team members may discuss the same situation, but each person frames it differently. The conversation is diffuse and incoherent because many contradictory frames are being used. Participants are unaware how they and others are framing the situation. This lack of awareness limits learning and thinking.¹¹⁹

Awareness of one's own frame and that of others who are a part of the team is the process of "reframing." This is not an easy step since it demands of the team members the ability to see how others understand the same issue and to recognize one's own biases.¹²⁰ Acceptance of and openness to the unique giftedness of others is critical at this stage so that movement can occur and "dialogue," as Hawkins calls it, or a "critical conversation," as Regan calls it, can occur.

Such a dialogue or conversation is what characterizes the third process of "integrating perspectives." Here is where significant conflict can occur, but so could "pooled learning" or a gathering of the different understandings of each member of the team.¹²¹ If there is mutual respect, trust and openness on the part of all to remain collaboratively engaged, then the result will be a perspective that is not the sum of the various parts or diminishment to a shallow consensus. Instead, Hawkins notes that "at its best, it triggers the emergence of wholly new ways of understanding reality."¹²² When a team arrives at these "new ways of

¹¹⁹ Ibid., 108.

¹²⁰ Ibid., 109.

¹²¹ Ibid., 118.

¹²² Ibid., 113.

understanding” that incorporate various perspectives, according to Hawkins, “synergy” has occurred.¹²³

Just because the team has come to agreement and a new perspective has arisen does not mean that it is correct in its understanding. The team learning process continues with “experimenting” and “crossing boundaries.”¹²⁴ The new perspective needs to be tested in the real world. Through the process of experimentation the team may need to move beyond its task and engage other teams to share with them the perspectives that they have tested through experimentation. The collaborative endeavor then is not simply reserved to the inner workings of the team, but collaboration is extended to other teams as well. The team that works in this way has then arrived at the “continuous learning” phase.” Hawkins notes that “team synergy becomes so contagious that team members use it everywhere.”¹²⁵ The collaborative learning moves beyond the team and out into the larger organization and the process with the team and the organization starts all over again with other issues.

Without collaboration, team learning would not be possible. Collaboration is the process by which the learning occurs, and without good collaboration on the part of all involved in the team the movement through the phases would not be possible. Hawkins notes,

¹²³ Ibid., 118.

¹²⁴ Ibid., 114.

¹²⁵ Ibid., 119.

When people collaborate as part of a team, they learn together. They do not rely on an expert to tell them what they need. Together they determine the meaning of their activities and create shared mental models. They form a community of teaching and learning.¹²⁶

All are engaged in the process rather than just a choice and elite few.

All of the above assumes, as Elizabeth Box Price, an adult learning theorist, contends, a level of thinking at what Robert Kegan, a theorist on cognition, would call *fourth order*. She notes that “these individuals can work as systems thinkers through corporate processes and self-directed learning.”¹²⁷ While *third order* thinking would be at the conventional level, *fourth order* thinking moves beyond the conventions and examines the larger perspective.

This is a capacity that is able to *have* opinions, values, and rules, rather than these opinions, values, and rules being in control. It is the ability to step back and objectify what is under consideration while continuing to relate to others subjectively. To be in control of one’s own issues, rather than having these issues be in control, is required for fourth order consciousness.¹²⁸

Not everyone who is involved in a collaborative team has these skills. The National Formation Committee has this issue with some members who are able to engage in *fourth order* thinking and others who are at a conventional level. Price notes that this issue is not insurmountable. The key aspect for a team or congregation is openness toward *fourth order* thinking. Price notes,

¹²⁶ Ibid., 71.

¹²⁷ Elizabeth Box Price, “Cognitive Complexity and the Learning Congregation,” *Religious Education: An Interfaith Journal of Spirituality, Growth and Transformation* 99, no. 4 (Fall 2004): 361.

¹²⁸ Ibid.

It may be that only a few persons who are in leadership need to have this kind of reflective analytical ability to engage a congregation in this manner. This could be a pastor and a few well-trained lay leaders who lead the way and set the tone so that the group learns to proceed in this manner. . . A congregation can carry out fourth order structuring for conventional thinkers without undermining their development in the fourth order. This is possible because the very nature of a learning congregation as defined earlier describes the kind of structure that can invite and foster a movement toward fourth order thinking. It forms a modality that can invite, encourage, and beckon persons into a new thinking structure.¹²⁹

What Price says about learning congregations can be also applied to learning teams which is the intermediate and necessary step between individual learning and organizational or congregational learning.

Collaboration at the team level is also where the beginning development of a “shared vision” occurs. The activity of the team in struggling with collaboration, conflict and conversation on issues moves the process toward what management theorist, Peter Senge, would call “shared vision.” Senge posits,

If any one idea of leadership has inspired organizations for thousands of years, it’s the capacity to hold a shared picture of the future we seek to create. One is hard-pressed to think of any organization that has sustained some measure of greatness in the absence of goals, values, and missions that become deeply shared throughout the organization.¹³⁰

A “shared vision” develops when the group is willing to join together around the vision. If collaboration is done well as a team with all of the gifts of the team honored and conflict managed rather than avoided, then there is a possibility for a “shared vision” to develop.

¹²⁹ Ibid., 369-369.

¹³⁰ Peter Senge, *The Fifth Discipline: The Art and Practice of a Learning Organization* (New York: Currency, 1990), 9.

The shared vision discipline is essentially focused around *building shared meaning*, potentially where none existed before. Shared meaning is a collective sense of what is important, and why. In traditional organizations, the only meaning which most members know has been handed to them from above – from a tacit hierarchy of meaning embedded in the organization’s authority structure.¹³¹

The activity of team learning develops new meanings for a group and can result in a “shared vision,” but care must be taken that the vision is not shallow consensus, or worse, simple “compliance.” The process at the team learning level will provide a place and space for the development of a “personal vision” “Shared visions emerge from personal visions. This is how they derive their energy and how they foster commitment.”¹³² Coming to a “shared vision” is not easy, but collaborative leaders, as Hawkins notes, “facilitate learning when they help people create a shared vision.”¹³³

A “shared vision” of “collaboration from the beginning” in the UAC is not one that is commanded from above and others assent to it. Those in the UAC, particularly those in leadership, need to grow through collaborative learning into such a “shared vision.” Regan notes that “it is incumbent upon the leaders to encourage the members of the organization to both influence and recognize their personal vision within the shared vision.”¹³⁴ Members of the UAC will have different reactions to this shared vision of “collaboration from the

¹³¹ Peter Senge, et. al., *The Fifth Discipline Fieldbook: Strategies and Tools for Building a Learning Organization* (New York: Currency, 1994), 299.

¹³² Senge, 197.

¹³³ Hawkins, 71.

¹³⁴ Regan, 124-125.

beginning.” A sustained, critical conversation is the only way the group will move from compliance to enrollment to commitment.¹³⁵ Senge argues that only a movement from compliance to enrollment to commitment will lead to a true “shared vision.” Those who are compliant in a group, even genuinely compliant ones, will only do what is needed because others have the vision and they are willing to implement it because that is what is expected of them. Those in the group who are enrolled in the vision want the vision to happen, but will not change structures to do it. Those who are committed not only want the vision to happen and “will make it happen,” but also create “whatever ‘laws’ (structures) are needed.”¹³⁶

Senge posits,

There is a world of difference between compliance and commitment. The committed person brings an energy, passion, and excitement that cannot be generated by someone who is only compliant, even genuinely compliant. The committed person doesn’t play by the rules of the game. He is responsible for the game. If the rules of the game stand in the way of achieving the vision, he will find ways to change the rules. A group of people truly committed to a common vision is an awesome force.¹³⁷

A true commitment to a “shared vision” of “collaboration from the beginning” in the UAC will not happen quickly, but can be built through the process outlined above. This process, however, is theoretical. The next chapter will outline the way the theories reviewed in this chapter can be utilized not only in the design of a methodology for formation sessions on collaboration, but also as part of the content of the sessions themselves.

¹³⁵ Ibid., 125.

¹³⁶ Senge, 203-204.

¹³⁷ Ibid., 205

CHAPTER FIVE

COLLABORATION SESSIONS: PROCESS REVIEW

Overview of Collaboration Sessions

On March 1, May 31, and June 28, 2008, day-long on-going formation sessions on collaboration were held for the National Formation Committee (NFC) of the United States National Coordination Council (USNCC) of the Union of Catholic Apostolate (UAC) at Bishop Eustace Preparatory School in Pennsauken, New Jersey.

The program included all members of the NFC. The NFC is composed of six national leaders of the UAC. The group ranges in age between fifty and seventy-five. There are five lay people (three men and a woman) and one religious sister. All, but one, have college educations. Two have doctorates, one in religious education. Two are engaged in full time ministry. At the April, 2007 meeting of the USNCC, the members of the committee were given an initial presentation on this project and the purpose of the sessions. They agreed to participate in the sessions. Frank Donio, S.A.C., director of this project, was the facilitator of the program. He has a dual role since he was also President of the National Coordination Council at the time and also a member of the General Coordination Council of the UAC. The group is accustomed to seeing him in the role of facilitator since he functions in this way during the USNCC annual meetings. At the outset of the sessions he needed to clearly articulate his role as facilitator and model a collaborative style of leadership.

Goals of the Sessions

An experience of collaborative learning will greatly benefit the work of the NFC as it attempts “collaboration from the beginning.” Such collaboration will require a reimagining of the way that leadership is done in the Church and also in the UAC. The members of the United States National Coordination Council along with the local and regional superiors of the Core Communities of the UAC have an opportunity to enter into a new way of leading within the UAC that bespeaks “collaboration from the beginning.”

An appreciation of the unique giftedness of all members provides a context for the “critical conversation” that will need to occur first within the NFC and then among the leadership of the UAC and beyond. The conversation will not occur just once, but will be “sustained” and needs to be a moment where mutual respect and trust must be present.

During the conversation there will be conflict which should be welcomed as an opportunity to come to greater learning on the part of all what collaboration truly means and how it is done. This conflict should not be avoided because of some pre-conceived notion of what it means to be a faithful Christian or because there is a desire to rush to consensus. Conflict will allow for healthy growth in understanding and hopefully to some type of “shared vision” that will be the commitment of all.

In order to be effective, this must be a process of team learning. The crucible of team learning will provide the collaborative locus for deeper understanding and transformative learning. The work of the team, in this case the NFC, if done well will not only be an opportunity to learn about collaboration, but also to experience it and thereby come to a

deeper understanding and “shared vision” of what it means to be “collaborative from the beginning.” The conclusion of an appendix to the *General Statutes* of the UAC notes that this process is something that is ongoing. The appendix, “Together and for One Another,” states,

The ability to collaborate with God and every neighbor always and everywhere is a life long learning process. The willingness, competence and perseverance required for this must be patiently prayed for as well as intensively practiced and fostered in education and on-going formation.¹³⁸

A shared vision on “collaboration from the beginning” in the UAC will only develop after sustained “critical conversations” within the UAC, beginning with the formation committee, and by truly living this central aspect of the “way of being Church” that is the Union of Catholic Apostolate.

Session Content

Each of the sessions included prayer, critical conversation (dialogue) on the texts utilizing the methods of Peter Senge, Thomas Hawkins, and Jane Regan, sharing of individual experience and individual views of collaboration, a “collaboration in action” exercise, and on-going development of a shared vision of collaboration. The goal of the sessions was the development of a process for sharing individual visions of collaboration in order to come to a shared vision of collaboration or at least a shared understanding. The

¹³⁸ Union of Catholic Apostolate, “Together and For One Another – The Characteristics and the Way of the Union,” Appendix to the *General Statutes* (Rome: Union of Catholic Apostolate, 2008), n. 18.

main texts for the sessions were *Collaboration: Uniting Our Gifts in Ministry* by Loughlan Sofield, ST and Carroll Juliano, SHCJ and UAC texts related to collaboration.

A large conference room with movable seating, work table and kitchenette was used. The sessions were preceded by a continental breakfast. Lunch was also provided.

Pre-sessions Surveys

Prior to the start of the sessions all participants were sent by mail and email a pre-sessions survey. The pre-sessions survey provided a way to measure the understanding of group members about collaboration and its role in the UAC. The pre-sessions survey also gave the facilitator some information about the understanding of the group regarding collaboration.

A post-sessions survey with somewhat similar questions was given to the group at the end of the sessions. The pre and post sessions surveys provided data for comparison purposes once the sessions were over.

The pre-sessions and post-sessions surveys were developed in collaboration with the St. Vincent Pallotti Center for Apostolic Development in Washington, D.C. The Center often surveys the various groups it serves and the director of the center has significant experience with the development of surveys of lay people in ministry.

The pre-sessions survey focused on the views of the participants of the Union of Catholic Apostolate and on collaboration. There were seven questions in the survey. The length of the responses of the participants was directly related to their educational level.

Those with a higher educational level gave longer and more theoretical responses while those with less education gave shorter and more practical ones. Some of the responses used religious language while others did not.

The first question asked, “What do you think are important aspects of the Union of Catholic Apostolate?” The answers to this question ranged from functional – “method of bringing various people from different Geographical [sic] with a variety of approaches to promote St. Vincent’s Ideals [sic] for the Catholic Apostolate” – to a discourse that included points on prayer, group discernment, practical procedures, mutual encouragement, leadership, learning, and passionate commitment. A way of “gathering together members” was the only consistent theme in most of the answers.

Questions two, three, five and six dealt with collaboration and the term “collaboration from the beginning.” Most of the participants described collaboration as “working together.” The descriptions were mostly functional in nature and related to performing a task. The term “collaboration from the beginning” was unknown to all participants, except for one who had been on the General Coordination Council of the Union.

The surveys showed that there was limited knowledge in the group regarding terms and definitions that have been used for at least thirteen years, by the time the session commenced, in various documents related to the Union of Catholic Apostolate. The number of years of activity in the Union and the educational level of the members of the group were irrelevant factors. The only person who utilized the language used in official texts was a

participant who had been a member of the General Coordination Council of the Union in Rome.

All of the participants described themselves as collaborative in general. They all hoped to gain some new learning or experience about collaboration from the sessions.

Session One – March 1, 2008 – Differing Gifts in Collaboration

The goal of the first session was to foster greater appreciation of individual and group giftedness and to begin a critical conversation on collaboration. The session objectives were to deepen the group's understanding of individual gifts of members, to introduce the concept of "critical conversation," to introduce communal collaboration as part of the UAC charism, to begin a "critical conversation" on collaboration, and to introduce selected theorists as a framework for the ensuing discussion. The goal at the end of the session was that each member of the group would be able to name some individual gifts of each member of the group, some important aspects of a "critical conversation," three different types of collaboration, gain an initial understanding of group members' views of collaboration, and participate in a "critical conversation" on collaboration.

The texts on which the first session was based were chapters one and two in Sofield and Juliano's *Collaboration*, Regan on "critical conversation," and Freeman on three types of collaboration. A collage making activity, which was the most successful part of the day, was used as a means to share individual giftedness.

Four of the six members of the group were present. The group members who were there very much enjoyed the gifts collage activity and encouraged the facilitator to ask the others in the group to make one and re-share our collages at the next meeting. One person who was not there searched online about Sofield and Juliano and found a PowerPoint presentation on the first two chapters which after reworking were used as a quick refresher and conversation starter. Throughout the session the facilitator made the connection with the charism and noted that Sofield and Regan as well as other theorists we use are simply tools to assist us. He likened it to outside consultants who come in and tell the group information that they already know, but in a somewhat different way. The conversation about individual visions of collaboration was productive, however there was some tension between two of the members of the group regarding the necessity of a formation manual. This tension was not related to the session, but was due to an on-going conflict they have over this issue. The facilitator gently drew them back into the process at hand and they did respond. The group did not get to the work of beginning a definition of collaboration for the group. Since the other group members were not there, the conversation could not happen as fully as intended. The facilitator noted the need to incorporate some type of review of this meeting into the next session in order to give the other members a chance to respond with their individual views on collaboration.

An interesting point to note was that two of this session's group members were focused more on theory and the other two were focused on experience since they coordinate a local group of UAC members and the other two do not. The facilitator tried to affirm the

gifts of all especially the ones speaking from experience because at times they manifested a feeling of inferiority before the "theorist" types. The facilitator also tried to deflect away from himself attempts to cast him in the role of an expert by re-asking questions back to the group. This technique worked well and all seemed to participate more from her or his perspective. In general, the facilitator remained part of the group, but sometimes this was a challenge and at one point one of the group members asked his thoughts as he was recording the thoughts of others. That invitation was good because he could affirm being a part of the group.

Session Two – May 31, 2008 – Toward a Shared Vision of Collaboration from the Beginning

The goal of the second session was to continue “critical conversation” on collaboration from individual visions toward shared vision. The objectives of the session were to foster greater cohesion of the group and incorporation of new members, appreciation of the individual giftedness of all group members, provide additional necessary data to facilitate a critical conversation, continue “critical conversation” on collaboration utilizing the “shared vision” concept, and expand participants’ knowledge of contemporary discussion on collaboration in the UAC. The goal of the session was that each participant would be able to name some individual gifts of all members in the group, name the different types of collaboration according to Freeman and supply their own definitions for them, articulate their individual view of collaboration, and actively participate in further “critical conversation” on collaboration.

The texts for the sessions were based on an appendix to the *General Statutes* of the UAC called “Together and For One Another,” chapters five and six of *Collaboration* by Sofield and Juliano, an excerpt from *Spiritlinking Leadership* by Donna Markham on collaborative groups, and Peter Senge on “shared vision.”

All six members of the group were present. After the opening prayer session, part of the morning was given over to a review of aspects introduced in the first session since the full group of members was present. The group members who were present at the first meeting were invited to summarize their experience and learning from the first session. The gift collages were shared or re-shared. Those who were not present for the first meeting prepared their gift collages ahead of the session. Freeman’s examples of collaboration were re-introduced as well. The group did not enter into the sharing of the gift collages as significantly as they did in the first session. Partially this may have been due to the fact that the collages were not prepared together. Also, some of the group members who were at the first session did not remember what some of the symbolic images on their collages meant at the time of the preparation of the collage. The group members did find the collage activity helpful since it permitted them to share their personal giftedness with the rest of the group.

The concept of “collaboration from the beginning” was introduced to the group members who were present for the first time at this session. Once again, the concept was new to most of the group members and the connection with the spirituality of Pallotti on collaboration as found in “Together and For One Another” needed to be explained by the

facilitator. The concept was seen by some as impractical or even impossible, but possibly worthwhile as an ideal.

The group members were most engaged when discussing the chapters from Sofield and Juliano and the quote from Markham on collaborative groups. The majority of the group had read the texts and most shared that they had already put principles from the text to use in their daily lives and also in their work in the UAC. Individual meanings of collaboration were once again explored and the results of the sharing were captured in a word processing file and shown on a screen in the front of the room where the group was meeting. This method allowed for easily manipulation of text as the conversation moved forward. Senge's concept of "shared vision" was then introduced through a lecturette and discussion. A handout summarizing the concepts was presented. During the final hour of the day, the group began to take the information gleaned from a personal view of collaboration and began to discuss common themes. The individual views of collaboration began to be consolidated into a "shared vision" of collaboration.

The group was not as cohesive as in the first session. This lack of cohesion may have been due to the introduction of additional members which almost doubled the size of the group. Also, in the first meeting two of the members had worked together in the past as did the other two members. The flow of the day was not as smooth as in the first session, partially due to the repetition of foundational material in the second session that had already been given in the first.

Only four of the six group members completed the evaluation sheets for session two. All of the evaluations evidenced a great openness on the part of the participants to further learning about collaboration. The group members in the evaluations also expressed a desire to put the learning about collaboration into practice more fully.

Session Three – June 28, 2008 – From Individual Visions to a Shared Vision of Collaboration

The goal of the third session was to expand the “critical conversation” on collaboration beyond individual vision toward shared vision without diminishing potential areas of conflict. The objectives of the session were to deepen “critical conversation” on collaboration through further articulation of individual visions, assist group members in coming to an understanding that conflict and confrontation are often part of the collaborative process, provide an opportunity for the group to reflect on and discuss new learning that came from official UAC readings on collaboration, and continue the process toward a shared vision of collaboration. At the end of the session the participants would be able to further articulate their individual views of collaboration, gain additional understanding of group members’ views of collaboration, and actively participate in development of a “shared vision” of collaboration in the spirit of the UAC charism.

The texts used for the session were the appendix to the *General Statutes*, “Together and For One Another,” the work of Peter Senge from *The Fifth Discipline*, on compliance, enrollment and commitment, and chapters eighth, nine and ten of *Collaboration* by Sofield

and Juliano on conflict, confrontation, and the structure and process of collaborative ministry.

Five of the six group members were present for the session. The morning began as the other sessions did with prayer and refreshments. The group members were invited to share their insights and learning from “Together and For One Another.” Most in the group had read the text, but half of the group found the text somewhat challenging to read due to the technical religious language used. The facilitator focused the attention of the group on sections of the text that referred specifically to collaboration from the beginning. This approach seemed to make understanding of the text easier for those who were challenged by the content and language.

The group members were more engaged in the discussion on Senge’s theory about attitudes toward the vision as it related to the UAC. They were able to distinguish easily the compliant, the enrolled, and the committed. In general, the group members identified themselves as committed to the vision, but saw particularly some of the members who were in one of the three Pallottine core communities as compliant toward or enrolled in the vision. The group members were clear that commitment to the shared vision on the part of all UAC members was the goal, but they were vague as to how this could happen.

The facilitator gave lecturettes with PowerPoint presentations when presenting the work of Sofield and Juliano. Some in the group had not considered the role of conflict and confrontation as ways toward deeper collaboration, particularly the aspect of reconciliation.

Throughout the presentation on these concepts the facilitator tried to make connections with the appendix “Together and For One Another.”

Following lunch the conversation continued toward bringing the individual views of collaboration into a shared vision of collaboration. The list of aspects that would form a shared vision of collaboration was drawn together into four main areas:

- 1) recognition and affirmation of other people’s gifts and our own – open-minded – building a sense of trust among the members – compassion – mutual encouragement and confrontation – most valuable – loss of ego (Forgiveness);
- 2) sharing faith life – personal approach to spirituality;
- 3) cenacle working together – individual limited – cooperation from others – decision rises out of the group – working together in certain endeavors;
- 4) systems perspective – big picture – seeing how things work – how people work- leadership, learning, passionate commitment – shared visions – worldviews.

These aspects form the basis for a shared vision of collaboration as seen by the NFC. The “critical conversation” on collaboration began to move the group from individual vision toward a shared vision of collaboration from the beginning. The group was not at the point of commitment to this shared vision, however. Enrollment would be the best word for the point where the conversation associated with these sessions concluded.

Post-Sessions Survey of Process

The group members’ response to the process and the facilitation of the sessions were presented through the use of surveys. The ten question post-sessions survey inquired about the any changes in understanding about the Union of Catholic Apostolate, collaboration, and decision-making. Three of the questions were somewhat similar to the pre-sessions survey.

The use of some similar survey questions provided the possibility for comparison of responses and analysis of any growth in learning. The majority of the participants (five out of six) responded to the post-sessions survey. As in the pre-sessions survey, those with a higher educational level or significant professional experience gave longer and more nuanced answers. All five of the respondents used some religious language, but in general, the participants tended to utilize more common conversational language. The only respondent who used technical religious language was the religious sister.

The first question asked the participants to note any changes in their “assessment of the important aspects of the Union.” In all of the surveys the respondents noted that their assessment did change. Their comments focused on the practical aspects of collaboration and the need for recognition of the gifts of individuals in a group. One noted that his overall “perception” of the UAC was enhanced and another stated that it was “deepened.”

Questions two and three focused on changes that the participants had in their understanding of collaboration. All of the respondents stated that their understanding of collaboration, particularly in relation to the UAC, had shifted. For one the shift was very nuanced and simply “reinforced the importance of collaboration the UAC.” Another participant noted “a recognition that my commitment to be collaborative needs to be on both the intellectual and emotional level,” which could be indicative of the effect on the respondent of the material from Sofield and Juliano which placed great emphasis on the psychological and emotional issues that either contribute to or are obstacles to collaboration. A greater shift in understanding is evident in another respondent, who stated that, “rather

than one or two ‘leaders’ directing the activities I now believe we will be more effective guiding members and ourselves using collaboration not only in the UAC but in our day to day lives.”

In the pre-sessions survey, all of the participants stated that they considered themselves collaborative. Question five of the post-sessions survey asked if they considered themselves collaborative and to give some examples of collaboration on their part, while question six focused on changes in decision-making. One respondent very clearly stated that as a result of the sessions he came to understand that he was not collaborative as a leader and planned “to look to joining with the other members in seeking those with the gifts necessary to accomplish the task at hand.” This response was the most dramatic shift. The others continued to see themselves as collaborative. Their examples ranged from committee work that sought “consensus” and led to group rather individual leadership to being “open-minded and respectful of others ideas and opinions.” The participant whose understanding of leadership changed also believed that a change in understanding of collaboration resulted in a different and more inclusive approach to decision-making. Another respondent believed that participation in the sessions by the group “will no doubt, at some level, help us to be more sensitive to its importance.” This person was cautious, though, with assessing “long-term impact on the way we work together” stating that “time will tell.”

Question seven focused particularly on describing their understanding of “collaboration from the beginning.” In the pre-sessions survey, question six asked a similar question. Only one of the participants, in the pre-sessions survey, a person who had

experience serving on the General Coordination Council of the Union of Catholic Apostolate, was able to articulate an understanding of the concept. All of the respondents were able to articulate an understanding of the concept that contained elements taken from the training sessions. One noted that “it refers to the experience of individuals working together either in the initial discernment of a need or in the formulation of a strategy to address some need.” Another stated that it is the use of “collaborative skills from the very inception of a ministry or project with the members of the group.” The key factor to note in the response is that the participants were able to formulate responses and recognized a key concept for UAC ecclesiology, while at the beginning of the training the majority was not able to do so.

In response to question eight, which asked if the training sessions were helpful, all of the participants stated that they were. Question nine asked if their expectations were met. Their responses went from “exceeded my expectations” to “not disappointed in the outcomes as such.” No respondent stated that it did not meet their expectations.

Finally, question ten, asked about the adoption within general formation sessions of the process from the training sessions as way educating in “collaboration from the beginning.” The responses were generally positive, but one of the respondents noted that “there was not sufficient time to explore in more detail collaboration from the beginning.”

The post-sessions surveys, in general, did show a change in understanding by the participants, particularly regarding the core concept of “collaboration from the beginning.” The participants were generally very positive in their responses and while offering limited

critique, were reflective about themselves and their own actions in future. All respondents intended to be more intentional in being collaborative.

Evaluation of Facilitation

Two weeks after the conclusion of the sessions, an evaluation of facilitation was emailed and mailed to the participants. All of the participants responded to the evaluation. The evaluation was adapted from one contained in *The Facilitator's Fieldbook*.¹³⁹ Twenty statements were rated on a scale of one through five with one being a very firm yes and five being a very firm no. The statements included some of the following: “presents directions clearly,” “balances participation by bringing others out,” “remains flexible while staying within designed structures and processes,” “records data from group members accurately,” “reasonably adheres to established time limits,” “makes sure actions and decisions are clearly specified,” and “evaluates the effectiveness of each group session before the end of each session.” The group members, except one, gave primarily a one for each of the statements. One group member gave three for most of the statements. In fact, the rather negative tone by this group member in his evaluation was surprising considering his responses in the post-sessions survey of process. He even put a “caveat” at the beginning of his evaluation noting that the evaluation was “colored by the salient features of the meetings and such general comments may not be a fair evaluation of the Facilitator’s specific efforts.” The respondent

¹³⁹ Tom Justice and David W. Jamieson, *The Facilitator's Fieldbook*, 2d ed (New York: AMACOM, 2006), 285-286.

seemed rather annoyed by those who were not as prepared for the sessions as he was. This person, however, was the most highly educated member of the group.

Four additional statements asked for more significant responses. These were “the things the facilitator does that most helped us as a group,” “the things the facilitator does that have most helped me be an effective group member,” “the things the facilitator could do more or less of that would support our group’s effectiveness,” and “the things the facilitator could do more of or less of that would support me in being an effective group member.” The responses to these statements were more useful for evaluative purposes.

A common pattern in the responses to “the things the facilitator does that most helped us as a group,” was his appreciation of the different viewpoints of the participants which led to, as one participant noted, “a constant and productive dialogue.”

The responses for “the things the facilitator does that have most helped me be an effective group member” revolved around two aspects, the ability of the facilitator to listen and to draw forth the viewpoints of group members. Two participants noted that these aspects permitted the group members, who believed that they knew each other well, to come to know each other better.

Only one person responded fully to “the things the facilitator could do more or less of that would support our group’s effectiveness.” The others were complimentary of the facilitator and his effectiveness. The one significant response focused on the lack of preparation, i.e., doing assigned readings, on the part of group members. Sometimes the facilitator would summarize these readings in order to provide a basis for conversation. The

person who responded in this way was the one with the highest amount of education and whose level of comprehension of the material was more significant than that of the other members of the group. The response also noted that the facilitator could have elicited more in the way of “personal experiences” from the group members.

The responses to the final statement “the things the facilitator could do more of or less of that would support me in being an effective group member,” were equally limited and again complimentary of the facilitator. The most significant comment was that “each member feels supported and that, in turn, helps our Formation Committee and down the road, for other group work, I’ll keep in my mind the lessons learned in this three-part seminar.”

While the responses to the Facilitator’s Evaluation were not as comprehensive as the facilitator had hoped, they did provide some insights. The facilitation would have been more effective if group members were given less in the way of presentation and more opportunity to discuss based on their learning from the reading. Questions to guide reading and stimulate discussion could have been distributed to the group members prior to each session. Group members could have then prepared responses and shared them with one another. At the actual sessions, the facilitator could have then drawn forth additional responses from the participants and assisted in keeping the conversation focused. The facilitation was a bit too facilitator focused and could have utilized more fully adult learning theory and particularly the concept of “critical conversation” that is necessary for “collaboration from the beginning” to actually occur.

While all of the participants agreed in their responses that the sessions were helpful, the response of one participant of “time will tell” is very true. The long-term effect on the quality of collaboration on the part of the members of the NFC remains a question, which will only be answered through additional follow-up on their actual functioning as a group.

The experience of the three-session program provides an opportunity to draw some conclusions about the interplay between the theory and practice of “collaboration from the beginning,” which will be explored in the following chapter.

CHAPTER SIX

CONCLUSIONS

This project offered an opportunity for a third of the national leadership of the Union of Catholic Apostolate in the United States to begin a “dialogue,” in the language of Sèamus Freeman and Thomas Hawkins, or a “critical conversation,” in the language of Jane Regan, on “collaboration from the beginning,” with the eventual goal of development of a “shared vision” on the concept and its practical application. Since a definition of the concept is still in process, the dialogue from the sessions also adds to the body of knowledge on it. In the introductory chapter, three contributions to ministry were outlined as possible from this project: 1) begin a process of development of a shared vision of “collaboration from the beginning” for use in local initial and on-going formation programs of the UAC; 2) provide data and a process for continued dialogue by UAC leadership on the concept of “collaboration from the beginning” and its significance for the life and work of the UAC; and 3) offer to others in ministry a process for formation in collaboration. These contributions will form the structure around which the conclusions will be discussed.

Begin a Process of Development of a Shared Vision of “Collaboration from the Beginning”

The three sessions did begin a process of development of a “shared vision.” among those who were present at the meeting. The review of the sessions, particularly session three, shows that the group was moving together toward a “shared vision.” This vision was at a very initial phase and continued sessions would most likely have refined the vision further.

The data in the pre-sessions survey and during the sessions clearly showed that all but one of the participants had not even heard of the core UAC concept of “collaboration from the beginning.” Since these participants were national leaders in the UAC, it stands to reason that many of the other members of the UAC in the United States have not heard of the concept either. At the international level, however, this concept is at the basis of the UAC understanding of how leadership and decision-making should function. Formation in this concept is critical to the proper functioning of the UAC in the United States. The post-sessions surveys show that most of the participants did gain a great understanding with one participant noting that it changed the way in which he viewed the appropriate method of leadership and decision-making within the UAC.

Provide Data and a Process for Continued Dialogue

The “critical conversation” of the National Formation Committee on “collaboration from the beginning” during the sessions did provide data and a process for continued dialogue. As noted above, the data clearly show the lack of knowledge on the concept. The data also show that there is a significant disparity in educational levels and experiential knowledge on the part of significant members of UAC formation leadership. Those with a more limited educational background, but extensive experiential knowledge, looked to the facilitator or the more educated members of the group to provide the significant input during the sessions. The more highly educated, but less experientially knowledgeable members readily attempted to offer this input. The facilitator needed to provide acknowledgement of

the different knowledge bases and invited greater participation by those who were more experientially based.

A similar situation will most likely occur among members of the UAC, particularly in on-going formation sessions. The presence of a member of one of the Core Communities of the UAC (priests, brothers, and sisters) could limit the contribution of other members of the group, even if other members of the group have more in the way of experiential knowledge of the UAC. The understanding that all have something to contribute, which is clearly articulated in UAC ecclesiology, needs to be emphasized in any program of initial or on-going formation on “collaboration from the beginning.” Such collaboration would not even be possible without the basic understanding of the giftedness of all and encouragement of their contribution.

The data from the sessions also show that as with many groups, conflict is avoided. Most of the participants engaged in the process of the sessions, but did not manifest much in the way of on-going commitment to furthering the process. In fact, since the sessions, the group has not requested to continue the dialogue on a “shared vision” of “collaboration from the beginning.” While this fact does not amount to conflict in an overt sense, it does show that the group was enrolled in the process rather than committed. They were willing to participate in the process while it was happening, but were not moved to continue the process as a group. There is no data to show if they continued the process on their own or with others. The form of conflict avoidance here is that the group rather passively complied with the direction that the facilitator took in the sessions. Once the sessions were over there was

no interest shown by the participants to continue any additional learning. They simply attended and participated in the sessions, took from them whatever they may have, and then moved on. A deeper dialogue on the subject of “collaboration from the beginning” was, therefore, avoided.

Any furtherance of the process and dialogue with the group will need to be on the part of the facilitator, who now serves as National Formation Promoter and Chair of the National Formation Committee. It remains to be seen how open the group will be to additional “critical conversation” on a “shared vision” of “collaboration from the beginning.”

Offer to Others in Ministry a Process for Formation in Collaboration

Over the last few years, the author has given several presentations on “collaboration in ministry” at national ministerial conferences. Formation in this understanding of collaboration is also part of a pastoral ministry course that the author teaches at The Catholic University of America. In every case, these presentations are well-received since the concept offers an understanding of collaboration that is firmly grounded spiritually, ecclesialogically, and practically. Portions of the sessions from this project have formed part of these presentations. The process of engaging others in “dialogue” on this form of collaboration occurs during these presentations and participants are highly encouraged to enter into such a “critical conversation” with their colleagues in ministry.

Members of the UAC who continue a “critical conversation” that leads to a lived “shared vision” of “collaboration from the beginning” can deepen their commitment to

“fostering faith, charity, a spirit of communion and of collaboration in the service of the Local Church.”¹⁴⁰ In so doing, the members of the UAC will fulfill part of its mission, the promotion of “collaboration among all the faithful in openness to new forms of evangelization.”¹⁴¹

¹⁴⁰ Union of Catholic Apostolate, *General Statutes*. (Rome: Union of Catholic Apostolate, 2003), 26.

¹⁴¹ *Ibid.*, 12.

February 13, 2008

Dear

Blessings during this Lenten season! Thank you for your willingness to take part in the conversation on "Collaboration: The UAC Way of Being Church." Our time together over the three meetings will give us the opportunity to share our vision of collaboration in the UAC.

As we discussed via email, our meetings will be on March 1st, May 31st and June 28th from 10:30 a.m. until 4 p.m. at Bishop Eustace Preparatory School (5552 Route 70 – Pennsauken, New Jersey 08109).

Enclosed please find the book *Collaboration: Uniting Our Gifts in Ministry* by Loughlan Sofield, ST and Carroll Julian, SHCJ. If possible, please read chapters 1 and 2 for our meeting on March 1st. Also, if you could bring with you the completed survey that I sent you via email, I would appreciate it. I have enclosed another one for your convenience as well.

If you need reimbursement for travel expenses, then please let me know. I am very appreciative to you for your willingness to be a part of this process.

Feel free to contact me at 301-422-3777 or at frfrank@sacapostles.org if you have any questions. Looking forward to being together with you!

Sincerely,

Fr. Frank Donio, S.A.C.

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6. If you attach any particular meaning to this phrase, “collaboration from the beginning,” please briefly describe what it means to you.
7. What are your expectations for these sessions?

Conversations on Collaboration – The UAC Way of Being Church

Meeting One – March 1, 2008

Differing Gifts in Collaboration

Meeting Goal: Greater appreciation of individual group giftedness and beginning of “critical conversation on collaboration

Objectives

- Deepen group’s understanding of individual gifts of members
- Introduce “critical conversation” concept
- Introduce communal collaboration as part of the UAC charism
- Begin a “critical conversation on collaboration
- Use authors as a framework for the ensuing discussion

Outcomes

At the end of the session the participants will be able to:

- name some individual gifts of each member of the group
- name some important aspects of a “critical conversation”
- name three different types of collaboration
- gain an initial understanding of group members’ views of collaboration
- participate in a “critical conversation” on collaboration

Texts - Sofield and Juliano, chapters 1 (*A Model for Collaborative Ministry*) and 2 (*Myths of Collaborative Ministry*), Markham on relations within groups (quote reflection), Regan on “critical conversation” (summary handout), Freeman on three types of collaboration (summary handout)

Schedule

Morning Session - Giftedness

10:30 a.m. – Refreshments and Welcome

10:45 a.m. – Prayer “Appreciation of the Other”

11:15 a.m. – Collaboration in Action Activity – “Gifts Collage”

12:20 p.m. – Connection of Activity with Charism

12:30 p.m. – Lunch

Afternoon Session – Communal Collaboration as part of the UAC Charism

1:00 p.m. – Introduction of Sofield and relevance to the process and Regan’s “Critical Conversation” theory

1:20 p.m. – Facilitated Discussion on Regan, Sofield and Juliano texts with beginning of “critical conversation” on collaboration – surfacing of individual views of

collaboration utilizing pre-session survey – Markham quote as summary,
if needed.

2:20 p.m. – Break

2:30 p.m. – Introduction of Freeman’s three types of collaboration and relevance to UAC

2:45 p.m. – “Critical conversation” toward a shared vision of collaboration

3:45 p.m. – Final Comments on Session

4:00 p.m. – Close of day

Appreciation of the Other

Taken from *Find the God Who Seeks You* by Fr. Vensus George, S.A.C.

“Treat everyone in kindness and in the name of Jesus Christ” – St. Vincent Pallotti

“Don’t just pretend that you love others: really love them. Love each other with affection and take delight in honoring each other.” (Rom. 12:9-10)

St. Vincent Pallotti thought that others are superior to him in every way. Hence he believed that in comparison with others, he deserved much less. This humble perception of himself made St. Vincent cultivate in himself a deep appreciation of other persons and their God-given talents. Besides, St. Vincent did not measure a human person in terms of what he has done, but rather viewed the person in relationship to Christ. If St. Vincent were to measure the other in terms of achievements, he might have found many faults in the other person. But since he measured the other in relationship with Christ, he was able to see the goodness and dignity of the other, despite human limitations. As a result, he perceived true richness in the other, which comes from a person’s relationship to God who has showered on the person many gifts and the person’s relationship to Christ, who is the model in everyday living. Hence, he treated every human person with genuine kindness and respect. Besides, he treated the other in the name of Jesus. It concretely implied that he considered the other as one redeemed by Christ. Therefore, whatever he did to the other has a bearing on his own relationship with Christ. For this reason, St. Vincent treated others with understanding, in order to maintain and grow in his own relationship with Jesus. Such an attitude towards his neighbors helped St. Vincent to understand other persons in their limitation and yet to love and honor them.

Am I able to perceive the many God-given gifts and abilities in other human persons?

Do I treat others with kindness and respect?

Do I deal with others in the name of Jesus?

Am I able to understand, love and honor other persons despite their limitations?

Closing Prayer (All)

Most holy Virgin Mary, Queen of Apostles, we humbly ask you to intercede with your beloved Son, our Lord Jesus Christ, that through the power of the Holy Spirit we may always act to increase, defend and propagate faith and charity. We ask you to hear our prayers that we may fight the good fight, run the course, keep the faith and be found worthy to wear the crown of justice among the ranks of the Apostles. Amen.

Collaboration in Action Activity

Individual Gifts Collage – Adapted from “Group-at-Large Collage” found in Julius Eitington, *The Winning Trainer: Winning Ways to Involved People in Learning*, 4th ed. (Boston: Butterworth-Heinmann, 2002), 86.

Goal: Group construction of a collage of their individual gifts as a means to explore the giftedness within the group

Items needed

- colored construction paper
- old magazines
- 5” x 8” cards
- felt tip markers and crayons
- tape
- cord
- paper clips
- stapler
- glue

The group will be instructed to make a collage with the gifts. Once everyone is finished the group will “tour” the collages will be encouraged to ask questions about the collages of each person.

Question for discussion in large group following completion of the collage

1. What did you learn about other group members in this activity?

Markham quote handout activities

- Distribute handout (p. 37)
- Give 3 minutes to read
- Invite group into dyad sharing for five minutes
- Small group reporting to large group
- Findings placed on newsprint and placed around the room

“On a practical, observable level, a collaboratively functioning group is notable by its lack of interpersonal defensiveness and judgmental attitudes among colleagues. Persons are free to be themselves. [It] is common for people [in a group] to refrain from exhibiting highly creative or brilliant ideas for fear of not being seen as “one of the bunch.” Persons tend to squelch their individuality and compromise their assertiveness in efforts to be included and accepted; they are not being true to themselves. Likewise, in a group in the midst of confrontation issues, colleagues’ apprehensions about being perceived as less authoritative or definitive may lead them to an overly aggressive, interpersonal itchiness as they relate with one another. This may not necessarily be representative of their truest relational style, either. In the collaborative work group, colleagues have grown to trust one another by having dealt with and survived less-comfortable situations that surfaced during the prior developmental phases.”

Taken from Donna Markham, *Spiritlinking Leadership: Working through Resistance to Organizational Change* (New York: Paulist Press, 1999), 104-105.

Does this quote resonate with your experience? If so, how? If not, why?

Critical Conversation Exposition activities

- Distribute Regan summary handout (p. 39)
- Give lecturette on Regan's theory of "critical conversation"
- Ask group to write answers to handout questions for sharing later

Aspects of a “Critical Conversation”

Taken from Jane Regan, *Toward an Adult Church: A Vision of Faith Formation*
(Chicago: Loyola Press, 2002), 131-139.

- not debate, deeper understanding
- first responsibility – “understand the other and assist the other in understanding me”
- characterized by openness, mutual respect and trust
- provides the opportunity to truly explore an issue and allows for significant exchange of ideas
- hidden agendas and manipulation are not acceptable
- not just one time, but on-going
- may and probably will change one’s perspective on an issue

“One of the important results of a sustained conversation is that we are able to move beyond the first level of common understanding and polite agreement and truly engage with the differences that are present in any community of faith. In sustained conversation, we have the opportunity to encounter the “otherness” in those with whom we converse. Sustained conversation allows the participants to move through a series of phases that can be described in this way: (1) We use the same words so we must mean the same thing – we have a lot in common; (2) She (or he) uses similar words to mean a very different thing – we have nothing in common; (3) She (or he) uses words to convey the convictions and values that shape his (or her) view of the world – we have much to share and learn from each other.” (Regan, 136.)

Does this view of conversation resonate with your experience? If so, how? If not, how not?

In what ways does this view of conversation assist in a collaborative process?

Facilitated Conversation of Regan, Sofield and Juliano

- What parts of the readings speak to your experience? (*Fold in group's writing about "critical conversation"*)
- How do different gifts contribute to collaboration?

Surfacing of Individual views of collaboration

Discussion of answers to questions two through six of “Pre-Sessions Survey”

2. Sometimes we may read about or hear people speaking about a project being done “collaboratively” or about an individual described as “collaborative.” When you hear this term “collaborative,” what ideas come to mind? In other words, what do you understand the term to mean?
3. In light of your explanation, to what extent do you consider yourself generally collaborative? If you do see yourself as usually collaborative, if possible, please give an example of when you were collaborative. If you do not see yourself as generally collaborative, please briefly say why you think you are not collaborative.
4. When you think about your involvement in the Union of Catholic Apostolate, to what extent do you make decisions pertaining to the UAC? Please briefly describe the kinds of decisions you make which pertain to the UAC and give an example or two of the decisions you have made in the past year or two.
5. Sometimes you may read about or hear people use the phrase “collaboration from the beginning.” Have you read about or heard this phrase before? Where?
6. If you attach any particular meaning to this phrase, “collaboration from the beginning,” please briefly describe what it means to you.

Types of Collaboration in the UAC

Bishop Seamus Freeman, S.A.C. notes that there have been three different types of collaboration in the UAC. Please write your own definition of these three and afterwards share them with one other person in the group.

Collaboration for . . .

Collaboration with . . .

Collaboration from the beginning . . .

Taken from Seamus Freeman, *In a Constant Search for Faithfulness* (Rome: Society of the Catholic Apostolate, 1996), 28–29.

Further “Critical Conversation” on collaboration

- Distribute Handout
- Give time for writing and discussion
- Give lecturette on Freeman with handout copy of pages 28 and 29 of *In a Constant Search for Faithfulness*.
- “Collaboration for...” “The nature of this type of co-operation is the classical participation in the role of the other. The other makes all the decisions, arranges all the planning and looks for ‘volunteers’ to help with the details. It is a passive participation. This can be a necessary service, but it is not what we mean by the co-operation of all, in the Pallottine sense.”
- “Collaboration with...” “Here there is some active participation, but of a limited type. The initiative comes from some one person, and along the way others are invited to have a say in the final content of a document or project.”
- “Collaboration from the beginning...” “The very birth of ideas and decisions comes from an act of communion which in our case brings together a global representation of all authentic expressions of the Pallottine charism.”
- What does this mean for us as the National Formation Committee of the USNCC? More importantly, what does this mean for us as members of the UAC?

- *Break group in half*
Please develop a working definition of collaboration
- *Write group definitions of newsprint and compare similarities and differences*
- *Attempt to develop a common working beginning definition of collaboration*

Final Comments

- *Observations by the group and the facilitator of the meeting*
What personal views were affirmed?
What new ideas did you hear?
What challenged you?
Any summary thoughts?

Collaboration Meeting II
Toward a Shared Vision of Collaboration from the Beginning

Meeting Goal: Continue “critical conversation” on collaboration moving from individual visions toward shared vision

Objectives

- Greater cohesion of the group and incorporation of new members
- Appreciation of the individual giftedness of all group members
- Provide additional data
- Continue “critical conversation” on collaboration utilizing “shared vision” concept
- Expand participants knowledge of contemporary discussion on collaboration in the UAC

Outcomes

At the end of the session the participants will be able to:

- name some individual gifts of all members in the group
- name the different types of collaboration according to Freeman and supply their own definitions for them
- articulate their individual view of collaboration
- gain additional understanding of group members’ views of collaboration
- actively participate in further “critical conversation” on collaboration

Draft Schedule

- Prayer
- Summary of previous gathering by group members
 - Insights and learning
- Re-sharing of Gift Collages – What can we name in the other?
- Re-introduction of types of collaboration (Freeman)
 - Examples from the group
- Review of Spirituality of Collaboration found in Pallotti
 - Sofield and Juliano – c. 6 – “Spirituality for Collaborative Ministry”
- Further exploration of individual visions of collaboration
- Introduction of “shared vision” concept
- Beginning of process of a “shared vision” of collaboration
- Evaluation of day

Collaborating through Prayer

All in the Image and Likeness of God

Taken from *Find the God Who Seeks You* by Fr. Vensus George, S.A.C., 106

"I intend now and at all times to venerate in everyone the image of God, in whose likeness they were created." (OOCC X, 202)

St. Vincent Pallotti never disrespected any human person, but rather he held every person with genuine respect and honor. He believed in the inner dignity of every person. For him, human dignity does not come from the person. But the basis of the dignity of the human person is indwelling divinity. Thus, human dignity is founded on the fact that the person is made in God's image. As image of God, the human person has the godly qualities of knowledge and free choice, with the help of which the person can know God and others, and enter into an intimate relationship with them. Since the person is made in God's image and possesses the divinity of God within, St. Vincent often said that he, at all times, would never hesitate to venerate in every human person the image and likeness of God. Therefore, the human person, as the image of God, is the temple of the Divine. Hence, the person must not be treated thoughtlessly, but with all seriousness, esteem and admiration. This realization made St. Vincent sensitive and gentle in dealing with others.

Reflect on and name our experiences, both good and bad over this week and bring them to this prayer moment.

Psalm 139

Collaboration Meeting III
From Individual Visions to a Shared Vision of Collaboration

Meeting Goal: Expand the “critical conversation” on collaboration beyond individual vision toward shared vision without diminishing potential areas of conflict

Objectives

- Deepen “critical conversation” on collaboration through further articulation of individual visions
- Assist group members in coming to an understanding that conflict and confrontation are often part of the collaborative process
- Provide an opportunity for the group to reflect and discuss new learning that came from official UAC readings on collaboration
- Continue the process toward a shared vision of collaboration

Outcomes

At the end of the session the participants will be able to:

- further articulate their individual views of collaboration
- gain additional understanding of group members’ views of collaboration
- actively participate in development of a “shared vision” of collaboration in the spirit of the UAC charism

Draft Schedule

- Refreshments and Welcome
- Prayer (Shared and Spontaneous)
- Review of previous gathering by group members
 - Insights and learning from UAC charism reading – “Together and For One Another”
- Introduction of Senge’s concept of compliance, enrollment, and commitment
- Role of Conflict and Confrontation in collaboration
 - Sofield and Juliano – c. 8 – “Conflict” and c. 9 “Confrontation”
- Further exploration of individual visions of collaboration
- Continue process of a “shared vision” of collaboration
 - Sofield and Juliano – c. 10 – “Structure and Process for Collaborative Ministry”
- Conversation on next steps for the group
- Initial evaluation of the day

Shared Vision

Summary taken from:

Jane E. Regan, *Toward an Adult Church: A Vision of Faith Formation*, pp. 124-126.

- Comes from the work of Peter Senge – *The Fifth Discipline*
- Not a vision statement
- Serves to motivate and energize all members of the organization
- Point of reference for all decision-making
- “Shared Meaning” – collective sense of what is important and why
- “Shared visions emerge from personal visions.”

Attitudes toward the Vision

- Compliance – accepts the vision and sees the advantages, but the vision is outside the scope of one’s personal vision
- Enrollment – more than willing to sign one’s name to it but can imagine the organization without it
- Commitment – sees it not only as the shared vision but as essential to one’s personal vision as well

Conveying the Vision

“Even when the shared vision is clearly articulated, the process of conveying that vision in a way that elicits commitment rather than simply compliance remains a challenge. Key to this is fostering sustained conversation with the goal of engaging as much of the [group] as one can in giving shape to the way in which the vision comes to expression. This tends to result in a higher level of commitment and, more important, serves to provide a context for drawing on the wisdom and gifts of the wider [group].” (125)

Collaboration Uniting Our Gifts in Ministry



**Loughlan Sofield, ST
Carroll Juliano, SHCJ**

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Sofield and Juliano

Collaborative Ministry

- Definition
- Four Levels of Collaboration
- Practical Steps to Collaborative Ministry
- Common Myths About Collaborative Ministry
- Critical Conversation

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Collaboration

Collaboration is a style of performing ministry in a way that is completely based on the identification, release, and union of all the gifts in the Christian community so that the mission of Jesus Christ continues.

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Four levels of collaboration

- Co-existence
- Communication
- Cooperation
- Collaboration

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Characteristics of Achieving Level 4 of Collaboration

- Acknowledges, articulates, and experiences a sense of ownership of a common mission
- Achieves a sense of unity accompanied by a desire to work together for a common goal
- Decides to identify, value, and bring together the various gifts

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Practical Steps to Collaborative Ministry

- Clarification
- Conviction
- Commitment
- Capacity/Capability

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Clarification

- A common and shared understanding of collaboration is essential.
- This is achieved through conversation and sharing.
- Collaboration is based completely on the concept of gift.
- Identification, release, and union of all the gifts in the Christian community

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Key questions to evaluate

- Do we assign the roles and functions based on a discernment of gifts?
- Is our effort truly ministry, i.e., focused on serving others rather than simply deepening our communal relationships?
- In what ways does our collaborative effort further the mission of Jesus Christ?

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Practical Steps to Collaborative Ministry

- Clarification
- **Conviction**
- Commitment
- Capacity/Capability

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Conviction

- Collaborative ministry is messy.
- Commitment to collaboration will endure to the extent those involved have a strong conviction of its importance and value.
- Without conviction, collaboration is abandoned once the messiness manifests itself, as it surely will.

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Practical Steps to Collaborative Ministry

- Clarification
- Conviction
- **Commitment**
- Capacity/Capability

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Commitment

- No one is unconditionally committed to collaboration.
- Even those staunchly convinced of the value of collaboration, experience resistance.
- Resistance comes from fears and obstacles.
- Identify, discuss and resolve these.

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Major Obstacles to Collaboration

- Low self-esteem
- Arrogance
- Burnout
- Inability or unwillingness to deal with conflict
- Unwillingness or fear of sharing faith
- Lack of knowledge of one's own and others' gifts
- Obsession with issue of power

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Practical Steps to Collaborative Ministry

- Clarification
- Conviction
- Commitment
- **Capacity/Capability**

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Capacity/Capability

- Skills
- Spirituality
- Process
- Developmental readiness

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Skills

- Group leadership
- Conflict resolution and management
- Confrontation
- Discernment of gifts

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Spirituality

- Moves to compassionate action
- Encompasses forgiveness
- Reflective
- Shared
- Fits the person
- Affective
- Able to integrate failure

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Process

- definite process
- common, gospel-oriented vision
- method for identifying gifts
- clarification of roles and responsibilities
- accountability and evaluation

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Development Readiness

- Four calls as a Christian
 - holiness
 - community
 - mission and ministry
 - Christian maturity
- Generativity as developmental stage
- “Am I mature enough to collaborate?”

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- **Common Myths About Collaborative Ministry**

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Common Myths

- Collaboration is easy.
- Membership in a group constitutes collaboration
- Collaboration is an end in itself
- Collaboration is primarily about decision-making, power, and authority
- Consensus is the only appropriate decision-making process in a collaborative group

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Common Myths

- Collaboration is egalitarian. There is no place for a designated leader.
- Collaboration is limited to staff/team

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Spirituality for Collaborative Ministry

“Ministry is the embodiment and expression of spirituality. While an action may be good, it is not ministry unless it is an expression and an overflow of one’s relationship with God.” (85)

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Insights about Spirituality

- Not one model
- Discernable Elements
- Deep Hunger for Spirituality
- Relationship with God and Others
- Two Core Elements – Compassion and Forgiveness

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Elements of a Spirituality for Collaborative Ministry

- Moves to Compassionate Action
- Encompasses Forgiveness
- Reflective
- Shared
- Fits the Person
- Affective
- Able to Integrate Failure

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Moves to Compassionate Action

- Flows from the depths of one's relationship with God
- Reaches out to alleviate suffering
- Linchpin where ministry and spirituality converge
- Not selective, universal

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Encompasses Forgiveness

- Presence of Forgiveness and attempts at reconciliation
- Potential to Transform Relationship
- Act of the will

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Reflective

- Touch the source of life within
- Gain knowledge of ourselves as gifted persons
- Ponder God's continuing call and our Response
- Reflection in the midst of hectic situations

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Shared

- Willingness and openness to listen and learn from those in different lifestyles
- Sharing Faith – revealing who God is for the person, and how God's presence is affecting his or her life

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Successful Communities

- Common approach to apostolate
- Dialogue on a value level
- Share faith - TRUST

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Fits

- Inward Journey
- On-going Discernment through Life
- Openness to new Encounters with God
- Collaborative, Communal spirituality includes support by others with whom one prays and ministers

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Affective

- Integrated Passion
- Emotions named, claimed, embraced
- Collaborative Ministry – feelings and emotions come into the process – can be ignored or integrated

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Integrates Failure

- Perfectionism – spiritual core value for many Christians
- Spirituality of Failure
- “Emotional and spiritual growth take place when a person can fail without losing self-esteem” (101)

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Beliefs about Conflict

- Conflict is inevitable in a Christian Community
- Religious people do not experience conflict
- Conflict among Christians is a scandal
- Conflict is a sign of life
- Conflict is difficult, messy, and painful

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- There is a difference between conflict resolution and conflict management
- Conflict when confronted and managed or resolved leads to group cohesion
- Peace at any price
- Good Christians do not flight
- Collaboration is only possible when conflict is acknowledged, confronted, and dealt with
- The best way to deal with conflict is to ignore it

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- Constructively dealing with conflict provides a sense of potency to the individuals involved
- Conflict not dealt with leads to individual pain and death to any collaborative effort
- Conflict produces tension

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Stages of Conflict

- Prepare for the Conflict
 - Clarify beliefs
 - Think about the other person
 - Consider practical factors
 - Seek consultation

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- Deal with the Conflict
 - Acknowledge the conflict
 - Define the cause
 - Needs
 - Communication
 - Developmental Issues
 - Loss
 - Make decisions about the conflict
 - Defuse the emotional level

- Attempt Reconciliation

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Confrontation

- What is confrontation?
 - A bringing of individuals face-to-face to look at the same situation
 - Articulating the truth, as seen by one individual, to another

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- Why confront?
 - To encourage dialogue in a search for truth
 - Because there is a genuine concern for the other
 - There has been a specific agreement about the mutual relationship

- Who should confront?
 - The person who is perceived as one who truly cares about the other

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- When to confront?
 - When there is the greatest potential for a climate that the one confronted will be able to listen to, hear, and understand the one doing the confronting
 - When there is adequate time to prepare a response rather than a reaction.
 - At a time that is conducive to both parties

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- How to confront?
 - Always confront in the first person
 - Select as the one doing the confronting the person most likely to be heard and listened to
 - Be direct and gentle
 - Restrict the incidents described to those which have occurred in the recent past
 - Confront the behavior, not the person
 - Do not interpret behavior
 - Be open to be confronted in return

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Structure and Process for Collaboration

- Key Elements
 - A vision with concrete objectives
 - A method for identifying the gifts of the community members
 - Clarity of roles
 - Empower a group to implement collaboration

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- Practical Steps
 - Examine our beliefs and behaviors and confront those that hinder our ability to collaborate
 - Discernment of gifts
 - Clarify roles
 - Develop the necessary skills
 - Nurture the spiritual foundation on which collaboration rests

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Post-sessions Survey

1. Has your assessment of the important aspects of the Union undergone any changes as a result of your participation in these sessions?
2. Now that you have participated in the UAC collaboration training experiences, what is your understanding of the meaning of “collaboration?” Please briefly describe the main ideas or practices you now associate with this term.
3. How has your concept of collaboration changed as a result of the training?
4. To what extent do you think the training in collaboration will affect your future decision-making within the Union of Catholic Apostolate? If possible, please give an example or two.
5. To what extent do you consider yourself generally collaborative? If you do see yourself as usually collaborative, if possible, please give an example of when you were collaborative? If you do not see yourself as generally collaborative, please briefly say why you think you are not collaborative.
6. Do you think your decision making process has changed as a result of your participation in these sessions?
7. What is your current understanding of “collaboration from the beginning?”
8. In what ways has the collaboration training been helpful in your understanding of collaboration? In what ways has it not been helpful?
9. To what extent were your expectations for these sessions met?
10. Do you believe that this process might enhance the process of formation in the UAC? If so, in what ways would the adoption of this process benefit the formation process? In other words, have the sessions on collaboration helped the UAC to get closer to the understanding and implementation of “collaboration from the beginning?”

Facilitator Evaluation¹⁴²

Place rate according to a 1 - 5 scale (1 being a very firm yes and 5 being a very firm no)

1. Presents directions clearly _____
2. Balances participation by bringing others out _____
3. Listens intently _____
4. Enforces ground rules fairly as needed _____
5. Reviews agendas for session before session begins _____
6. Uses a variety of interesting, useful process that keep people engaged _____
7. Remains flexible while staying within designed structures and processes _____
8. Promotes sufficient interaction between members of the group _____
9. Maintains group memory in an orderly fashion _____
10. Records data from group members accurately _____
11. Gives all suggested ideas equal consideration and attention _____
12. Is respectful and considerate of group members _____
13. Keeps us on task without being overly directive _____
14. Reasonable adheres to established time limits _____
15. Helps us to confront our differences and come to resolution _____
16. Brings closure to one item before moving to the next _____
17. Makes sure actions and decisions are clearly specified _____

¹⁴² Tom Justice and David W. Jamieson , *The Facilitator's Fieldbook*, 2d ed. (New York: AMACOM, 2006), 285-286.

18. Has supported me in being an effective group member

19. Evaluates the effectiveness of each group session before the end of the session

Please respond to the following statements:

The things the facilitators does that most help us as a group:

The things the facilitator does that have most helped me to be an effective group member:

Things the facilitator could do more of or less of that would support our group's effectiveness:

Things the facilitator could do more of or less of that would support me in being an effective group member:

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