

The FORUS Study and the Origins of the Center for the Study of Religious Life

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The FORUS Study

The FORUS Study (*The Future of Religious Orders in the United States*) was undoubtedly the most extensive social science study of men and women's religious life in the United States ever conducted. Conceived by David Nygren, CM, and Miriam Ukeritis, CSJ, under a grant from the Lilly Endowment its results were first reported in a video-conference and *Executive Summary* in September of 1992.¹ It was published in book form in 1993². Its basic methodology used a number of methods prevalent in organizational and clinical psychology building on the expertise of the two authors (Nygren in organizational psychology and Ukeritis in clinical psychology).

A current reading of the study, except for some social and cultural developments referred to by co-author Miriam Ukeritis, CSJ, in her article in this issue of Forum, gives it a quality of timelessness. One could pick it

up in 2005 and find most of the current struggles and challenges of men's and women's religious institutes in the U.S. FORUS analyzed the struggles systematically and offered directions for facing the challenges, which were surfaced by the empirical surveys and focus groups rooted in contemporary organizational change models. Its study of the dynamics of leadership³ must stand as one of the first and perhaps last efforts at integrating the contemporary social science of leadership with the dynamics of a faith-based vision of community. An executive summary of that portion was published in *Review for Religious*⁴. A video package and study guide were published in 1995. Even in this era of rapid discarding of yesterday's consumer products, the section on the observable concrete differences in the behaviors of competent in contrast to outstanding leaders should be required

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reading for anyone beginning leadership in U.S. religious life. The chapter studying the behavioral characteristics of religious identified by their communities as being people who were “unusually helpful, thoughtful, understanding, or caring persons” provides a profound reflection on our conversion toward becoming God’s grace to others.⁵ It is an excellent formation tool for those who have made use of the Fr. Ray Carey materials for assessment and evaluation from a behavioral perspective.

Some of the phrases from the study have entered into the collective lore and lexicon of U.S. religious life: meeting of absolute human needs, founding purpose as a way of understanding founding charism, loss of role clarity of religious in the Church, outstanding leadership in reference to competent leadership, the dynamics of transformation, the ten-year window for religious institutes, affiliative decline. The two most challenging paragraphs in the book may still present a critical challenge to U.S. religious life as strong cross-generational dialogues emerged in our institutes in the 1990s:

The most compelling result of the study indicates that a significant percentage of members of religious orders no longer understand their role and function in the church. This lack of role clarity can result in lowered self-confidence, a sense of futility, a greater propensity to leave religious life and significant anxiety. The

younger members of religious orders experienced the least clarity, and among them, women experienced less clarity than their male counterparts. Whatever clarity existed among men seemed to emerge from the definitiveness of ordination for priests and from the incumbent role requirements, as well as the clarity of the lay vocation for brothers. Women members are divided in the concept of consecrated life as it is distinct from or equal to that of their female lay counterparts. For sisters, brothers, and religious priests, Vatican II reinforced substantially the role of laity in the church but did not help to clarify for members of religious orders the unique contribution of their vocations as members of religious orders in the Church. “A related dynamic is regarded as affiliative decline. The data indicates that individuals who are currently members of religious orders obtain a high degree of satisfaction from membership in their congregations. In many instances, what holds them to their commitment to religious life is their personal need for a sense of affiliation, rather than their sense of communal purpose or mission. Communal bonding continues in spite of 30 years of membership decline. Congregations will continue to decline if affiliative motives are

stronger than a concern for the mission of the church and the extension of the charism. As the median age for members of religious orders continues to increase, yielding control of the congregation to those younger members who understand, and are able to present, a compelling vision of the group's mission may be critical.”⁶

A challenge that still confronts religious institutes 13 years later. It goes without saying that the observations and opinions in the study are not “off the cuff” bromides, but solidly founded conclusions of extensive research of religious under acceptable standards of social science methodology.

In many disciplines, such an extensive study would be generating evaluations to test whether the insights and directions set out have had a major impact on U.S. religious life. The study was not only conducted at great cost, it was also solidly based on the finest available current social science in the fields of leadership studies, decision-making models, role identity, and general organizational science. If such an evaluation would lead to a repeat of the old refrain: “When all is said and done, more is said than done”, then that reality would itself be worth testing. If there is a tough, hidebound resistance to change and transformation in religious institutes in the U.S. in the face of such a study, what could be behind it? If the study was tried and found wanting, what pertinent nega-

tives should be deduced from that to build on the work of further change and transformation?

The *Nygren-Ukeritis Study*, as it came to be named after its authors, emerged in a context of a number of social science analyses of U.S. religious life. Those with aging bookshelves will still have copies of Gerry Arbuckle's *Strategies for Growth in Religious Life* (1985) and *Out of Chaos: Refounding Religious Congregations* (1988) applying anthropological models to religious life; Patricia Wittberg's *Creating a Future for Religious Life: A Sociological Perspective* (1991) and *The Rise and Fall of Catholic Religious Orders: A Social Movement Perspective* (1994) both from a sociology of movements perspective; Diarmuid O'Murchu's *Religious life: A Prophetic Vision - Hope and Promise for Tomorrow* (1991) and *Reframing Religious Life: An Expanded Vision for the Future* (1995) from an anthropology of religion perspective; Lawrence Cada's (and others') *Shaping the Coming Age of Religious Life* (1979) from a history of religious life perspective; Barbara Fiand's *Living the Vision: Religious Vows in the Age of Change* (1990) from the new scientific consciousness and model. The studies of the Center for Applied Research in the Apostolate could constitute their own bibliography of a social science perspective on religious life.

The Archbishop Quinn Commission in the 1980s called forth by John Paul II's desire for a

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study of religious life in the United States had also made extensive use of social science studies in the course of its work. While much of this work is still in the archives of the study, one excellent book was published that collected the insights of many of the scholars who had worked on the study. It is *entitled* *The Crisis in Religious Vocations: An Inside View* (1989). The studies themselves with much of the documentation were considered confidential to the study at the time and history will find great interest in them as time goes on.

The Origins of the Center for the Study of Religious Life

The Center for the Study of Religious Life (originally called the Inter-Disciplinary Center for the Study of the Religious Life) was founded in 1997-98 and its inaugural opening event was celebrated on June 21, 1998. Its evolution emerged from the recommendation of a group of religious who had been meeting in the Washington, DC area from 1991 to 1993. In 1993 it was formally taken up by the Conference of Major Superiors of Men and the Leadership Conference of Women Religious as a possible project to be sponsored by the conferences along with an academic institution close to the religious life somewhere in the U.S. From 1993 it wound its way through the structures of the conferences in consultation with the theo-

logical unions around the country until a formal decision was made to implement the project and seek start-up funding for the Center in early 1997. The Catholic Theological Union in Chicago was chosen as the third sponsoring institution and the decision was made to establish the center at that site on the Southside of Chicago. Sr. Barbara Kraemer, OSF, with a strong background in social science and excellent organizational skills, was hired as the founding executive director in early 1998.

What gave rise to the emergence of the Center and how does it relate to the FORUS Study and its context? The group of religious that were meeting in the Washington, DC, area first gathered in the spring of 1991.⁷ The general purpose of the gatherings was to explore the significant body of experience and learning about religious life in the United States since Vatican II and to find a way of bringing it together in some useful way for learning and development. The history had moved very quickly along and memories would soon be dimmed. The idea of a center of some type for bringing about this sustained reflection emerged fairly quickly.

Among much of the learning and experience since Vatican II had been the social science studies referred to earlier and the clear contributions that could be made by such studies to the religious life. There was even a feeling that the studies were following quickly on one another and were being per-

ceived one-at-time as a sort of panacea for the revivifying and renewal of the religious life. At the same time, many of the studies, while quite cogent and helpful, were understandably communicated in the language of social science itself. It was not clear how they could be taken wholesale and used by leadership, formation, or other responsible constituencies for the governance of religious life. While the challenges were becoming clearer and clearer in the studies, the application of the studies to actual decision-making and renewal efforts in the context of the special types of communities that constitute the religious life in the Church was not so clear. Many of these communities back more than a millennia. Most of the rest straddle histories of many hundreds of years to at least two centuries. They were founded for eras in Church and social history long past. They do not easily conform to any of the categories of social science because of their specific rootedness in the Gospel and their history as charismatic movements of spirituality with layers of time and tradition clearly present even in their present identities.

An unnuanced effort to apply this social science directly could even lead to further secularizing of the communities (a real challenge since they opened themselves so directly to the world around them after Vatican II) since the methodological presuppositions of much of social science (with at its least methodological bracketing of

the very questions of transcendence that dominate the groups) is in radical contrast to the value bases of these communities. The Nygren-Ukeritis report itself had shown the necessity of uncompromising faithfulness to founding charism. There seemed to be a paramount need to pass the results of such studies through the solid faith-based reflection and history of the these groups. There also needed to be a theological methodological used that could be open to dialogue with the social sciences—a difficult challenge still in the Church and contemporary theological academia.

Yet there were very valuable insights emerging in the social sciences that could be of great benefit to the religious life. There were also new movements emerging in contemporary thought that could be quite friendly to the mission and lifestyle of religious life even as it has been historically understood. How could religious ignore good studies of group dynamics, organizational function, social movements, decision-making, group and organizational transformation, and analyses of group and organization function and disfunction?⁸

This material would have to be placed into dialogue with very particular community histories of spirituality and deeply rooted value systems. Many would think that contemporary theology is only now developing methods of interface and dialogue with the social sciences in this way.

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Finally, social science methodology is not a cookie-cutter phenomenon. Differing social scientific methods often are laden with assumptions that would need to be clarified if results were to be understood in useful ways. Two social scientists with very different methodologies can and often do lead research in very different directions. Methods often emerge from particular research projects that can be translated to the experience of other social realities. The results of social science studies can be made irrelevant to those who would make use of them when the type of phenomenon being studied are radically different from the groups to which one wishes to apply the study. For example, how do intentional communities, so often studied in sociology and that appear so much like religious communities, also differ in significant ways from religious communities? What impact would that have on applying that field of sociology to religious communities? Religious institutes would have little competence in making these kinds of distinctions without expert help.

Many of these conversations were taking place at the precise moment that the Nygren-Ukeritis study was released. There was great hope placed in the study as presenting U.S. religious with a highly sophisticated interpretation of some its greatest challenges and pressing them on toward more cogent work for renewal. The study itself sets out in its introduction the methodological limitations

of the study with respect to its application in practice to religious orders. A theological document was planned to bridge some of these concerns as well as an historical piece. There was already some fear that its helpful conclusions would never be widely implemented where and however appropriate unless some kind of intermediate step was not taken to help break down the social science conclusions into digestible and practical pieces for religious communities.

The discussions of this group of religious were broader than just this concern about the flurry of studies that had come forward and that were being planned. But these concerns were paramount considerations in the decision to make a formal recommendation to the two conferences in 1992-93. There was too much to be gained and too much to be lost in not making a significant effort in establishing a center to help bridge these gaps between theory and practice, social science and theology.

The Center had been quite ably led by Sr. Barbara Kraemer, OSF, during its founding period, and now Sr. Mary Charlotte Chandler, RSC, its current director brings highly refined skills and experience to the mission of the Center. Reflecting some of these founding concerns, Mary Charlotte has a doctorate in sociology and theology, a previous career at CARA and other excellent credentials for the work of the center. The world has moved on since the flurry of studies of

the 1980's and the 1990's, but the task and challenge remains of helping the full range of leaders of religious communities to make better use of the social science of our times in their work of continuing to lead their communities through what remains as a period of transition, transformation, and renewal. Given the complexities of contemporary society and culture in the United States, this may well be a work of enculturation as well.

A closing comment on how all of this applies to a current crisis in the Church. As the public has taken one of the closest internal looks at how Church decision-making may have either brought about or exacerbated the current crisis of sexual abuse of minors by clergy, it is difficult to avoid the observation that in the face of this most complex of problems that plagued the Church, key leaders turned to theology and canon law with the assumption that they would or must provide the answers for dealing with acts of sexual abuse by priests—a multi-layered phenomenon that had profound social, psychological, criminological, and organizational dimensions to it. There was first a turn to psychology not only to treat the men involved but to assess whether they would abuse again if returned to ministry. Then there was a turn to lawyers when the problem broke into the open and reached the courts in the 1980s.

It was likely one of the first times that Church leaders had to face a problem that required the use of decision-making models

that would have to include a calculus of moral theology, canon law, civil law, pastoral theology, psychology, media strategy, public perceptions about child sexual abuse, contemporary understanding of large organizational personnel policy, and, ideally, the sociology of organizations that can study what lessens or enhances the proneness for sexual abuse in organizations. The familiar turn to our internal Church values of theology and canon law alone was a tragic mistake for victims, perpetrators, the public, and the Church as an organization. The Church has perceived itself and articulated itself as a spiritual communion that has been given all that it needs to fulfill its mission from above. That formulation of its nature works well theologically and has also worked well in less secular societies than the complex social and legal system of the United States. The problem of sexual abuse of minors was simply too complex and tragic a problem in too complex a society for viewing it that way. Public debate in the Church about the right approaches to canon law and the proper moral language to define the phenomenon certainly have their place. They can no longer displace the need for listening to a range of social science expertise in this field as well.

We will not lessen sexual abuse in the Church with the correct canon law or the correct moral (or moralizing) language or even the best insights of bishops or major superiors talking together in a hall. It will

require turning to those who are experts in many of the fields mentioned above and listening carefully to those who know more than we do about these matters. CMSM was fortunate to have found such a group in Praesidium Religious Services and it has transformed the way we see the tragedy and opened us more than at any other time in our history to the realization that we need good consultants with expertise in social science of many varieties to operate well in our faith-based, Church-dedicated communities that are both fully human and fully rooted in the gracious mystery of God's redeeming plan. The insights we have gained are also serving to lessen the fortress mentality that dominated so much Church and religious life thinking since the Reformation and before Vatican II.

1 "Research Executive Summary: Future of Religious Orders in the United States", *Origins* 22:15, 257-72.

2 *The Future of Religious Orders in the United States: Transformation and Commitment*, Praeger Publishers (88 Post Road West; Westport, CT, 06881).

3 Pages 37-98.

4 "Religious Leadership Competencies", *Review for Religious*, May-June 1993,

5 Pp207-224.

6 Page 249

7 Early members were Shaun McCarty, ST; Fenton Sheeran, SSCC; Doris Gottemoeller, RSM; Mary Daniel Turner, SND; Catherine Pinkerton, CSJ; Margaret Cafferty, PBVM; and Ted Keating, SM. The group grew over the two years as more were brought in to broaden the conversation and test emerging proposals.

8 In the files at CMSM covering this history, there is a New York Times article from March 23, 1994 headlined "Academic Disciplines Increasingly Entwine, Recasting Scholarship". It sets out a rapidly spreading awareness in academia of the absolute necessity of interdisciplinary dialogue, no one narrow discipline being able to capture the growing complexity of thought or society. Globalization was too early a term for the article but it refers to what the impact will be as Western academia is forced to engage with world cultures and perspectives, often more religious than ours.