

# Returning to the FORUS Study: Reflections and Learnings

*... a ten-year  
window ...*

As you will see in the articles in this issue, the Future of Religious Orders in the United States (FORUS) study was released just over 13 years ago. The full and final publication was released 12 years ago. One of the key phrases from the study was a ten-year window for many religious institutes in the United States to reverse a trend toward decline.

We thought it would be helpful in a number of ways to return to study that came to be called the Nygren-Ukeritis report. It could help review progress over these years in applying the study to concrete issues in religious institutes. It could help to bring notoriety again to this study that likely predated the experience of many current leaders. It could breathe life into questions about the role of good applied social science in helping to further invigorate our religious institutes in the highly complex social situation and mass culture of the United States. The continuing relevance of the study seems to be

a matter of firm belief for the authors of the articles included here. But you will obviously reach your own conclusions.

Stephen Glodek, SM, a Marianist and former president of CMSM, was asked to share his experiences of being a leader in the period just after the release of the study because he had very intentionally worked to make it a priority in his own leadership. The observations of Miriam Ukeritis, CSJ, one of the co-authors of the study, could not be more helpful in seeking to explore its relevance today. I authored a reflection on the context of the release of the study, the emerging role of social science as a way of helping to invigorate religious life in the United States so current at the time, and the relationship of the study to the origins of the Center for the Study of Religious Life in Chicago. This Center has moved from the founding period to maturity over these years. Its birth was spawned in many ways from the study and

so many such studies done in  
the 1980's and 1990's.

We hope you will find these  
articles not only interesting but  
also helpful in coming to a  
better understanding of how  
some of the best work in social

science can be of help to us in  
leadership. This work is an  
integral part of the mission of  
the Center for the Study of  
Religious Life.

*Ted Keating, SM*

# Transformation and Commitment: Reflections After the FORUS Project

Miriam D. Ukeritis, CSJ

Today ... a new vision of how mission is furthered and charism is expressed ... is emerging.

Dickens' familiar opening of the *Tale of Two Cities* provides a fitting description of this era of religious life: "It was the best of times. It was the worst of times." The mantra Nancy Sylvester used in her LCWR Presidential Address is also appropriate: *Everything before us brought us to this moment. Standing at the threshold of a brand new day.*

This reality was pointedly brought home the other evening at dinner when our hostess asked a "senior" brother if he had written his memoirs. Serious reflection followed the initial response of laughter, as we outlined the possible content of his recollections. In his lifetime, he had moved from the clarity (and inflexibility) of pre-Vatican religious life, through the glory days of Catholic education to its near demise some years later. Significant work on understandings of sponsorship, movement to lay leadership of previously brother-led schools, reconfiguration of the congregation, and merging of provinces were but a few of the congregational milestones through which

he had lived and guided his brothers.

Internally, this congregation (like many others) saw a marked decline in numbers of entrants, significant diminishment in numbers, and the emergence of a plethora of concerns related to an aging membership. They were not untouched by the scandals of sexual misconduct and abuse that plagued the Catholic community in recent years. Efforts to respond pastorally and responsibly to members and victims called upon the creative, personnel and material resources of the congregation.

Today, former members and other lay partners collaborate with brothers in development and educational efforts. Formal sponsor education and lay

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**Miriam D. Ukeritis, CSJ, Ph.D.**, is a member of the Albany (NY) Province of the Sisters of St. Joseph of Carondelet. With David Nygren, she directed the Future of Religious Orders in the United States (FORUS) study. Miriam served as a member of her Province Leadership Team from 1996 through August 2004. She continues her ministry as clinical psychologist in the capacity of Director of Research at The Southdown Institute, Aurora, Ontario (Canada).

leadership development programs are in place for board members and lay administrators of sponsored works. A new vision of how mission is furthered and charism is expressed through the congregation's ministry – primarily in the realm of education – is emerging.

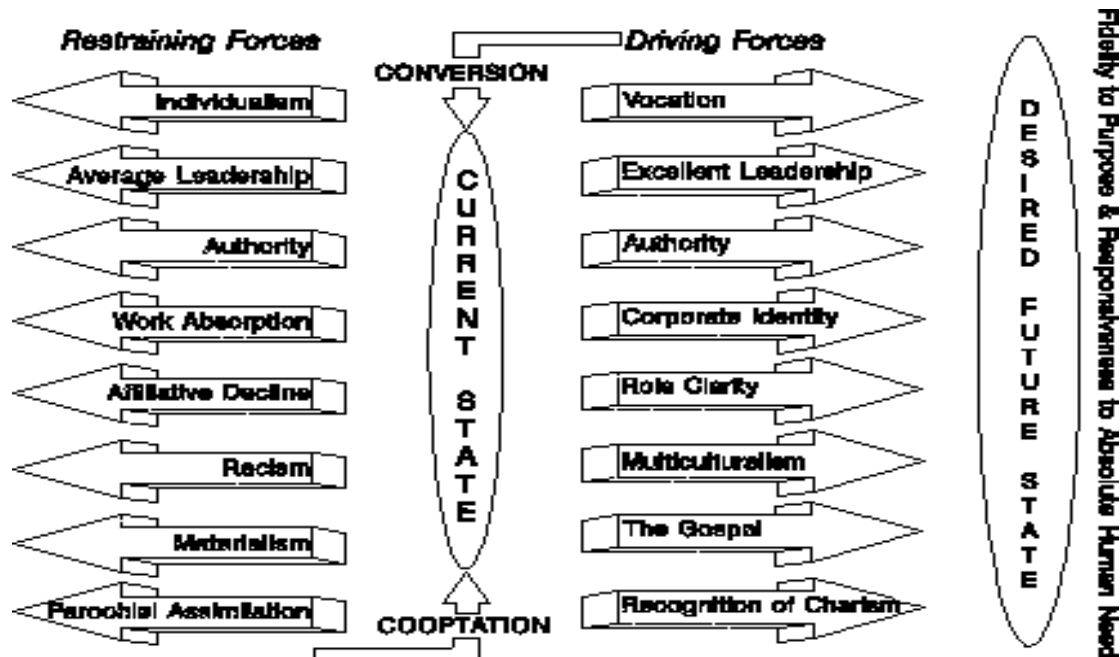
What of these developments were in the minds of those who responded to the FORUS survey in the early 1990's? How does this relate to the forces shaping the future of religious life? What have we learned since publication of the Nygren-Ukeritis FORUS study in 1992? And what about that ten-year "window of opportunity"?

## The FORUS Study and the "Window of Opportunity"

When the FORUS study was published in 1992<sup>1</sup>, we named several significant forces that could either support movement toward an optimal future or that, left unchecked, would continue to detract from achieving a future based on fidelity to founding purpose and respon-

<sup>1</sup> Nygren, David J. and Ukeritis, Miriam D. (1993) *The Future of Religious Orders in the United States: Transformation and Commitment*. Westport, CT: Praeger Press.

## Shaping the Future of Religious Life



siveness to absolute human need. These restraining forces included individualism, work absorption, materialism, and parochial assimilation while those that would bring us to a desired future included reclaiming the vocation to religious life, excellent leadership, recognition of the charism of religious life, role clarity and greater corporate identity.

The October 1992 teleconference, publication of the Executive Summary in *Origins* and subsequently in *Review for Religious*, accompanied by a range of articles in the public and religious press, helped focus the issues with which religious women and men across the US were already grappling. While not raising these questions for the first time, the FORUS study served to give language and provide a context for more open conversation and determined action. In the October 1992 teleconference, we observed that most religious congregations in the United States had a ten-year “window of opportunity” after which time these same groups would face irreversible decline.

In recent years, several references have been made to that “ten-year window.” While it was never intended to establish a definitive timeline for demise or revitalization, it was eminently clear, given demographics and trends, that without significant and prompt action many congregations would find themselves lacking human and material resources to continue into the future.

## Responses to the FORUS Report

Some groups took seriously the call to address the issues noted in the FORUS report. The means they used were as varied as the congregations. Some actions included combining development and vocations offices to “congregational advancement” teams, recognizing the connection between corporate identity and new membership. Provinces looked to reconfiguration in an effort to re-focus energies on mission. Groups with similar charisms met to plan collaborative efforts, and some of these congregations gave birth to new congregations. Other examples of efforts to revitalize abound.

It is not my intention in this article to judge these efforts, nor to canonize those congregations who have achieved some level of apparent success in addressing these concerns. I cannot claim to have knowledge of the internal workings of the hundreds of congregations and provinces in this country. There is increasing clarity, however, that because of, or in spite of, these many efforts, religious life in this twenty-first century will be radically different from what we have known. And, for many, very different from what we might have imagined. The challenge to leaders is like that of the farmer who prepares the soil, seeks the best seed, and does all humanly possible to provide the environment where the miracle of new life will

emerge. What might some of those tasks be?

## Post-FORUS Developments

Much has happened since the

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publication of the FORUS study – both in religious congregations and on this planet. Forces of globalization and ecology, for example, have been significant factors in shaping our lives, yet they were not mentioned in the 1992 publication. The understandings of our interconnectedness as well as the need to consider realistically the implications of ethnic diversity and multiculturalism, have been but heightened since 9-11 and the proclamation of the “war on terrorism.”

Interviews with many of those identified as “outstanding leaders” in the FORUS study have verified the major shift in agendas of congregations. This shift, they noted, is based on both internal and external factors. Internally, aging of congregations, diminishment or resources and questions regarding the future of sponsored institutions and the actual physical plants of our “motherhouses” comprise a significant portion of the agendas of leadership teams and councils. Recalling the combination of “opportunity” and “threat” seen in the Chinese character for crisis, some congregations approach these questions creatively and others are overwhelmed with threat. Many groups experience something akin to “the spirit is willing, but the flesh is weak” where creative ideas abound but personnel and energy to incarnate the dreams of service and ministry are lacking.

Internal effects of the abuse scandal have left many leaders

of men’s congregations in a state that is similar to those who are experiencing post-traumatic stress. Constant hypervigilance, preoccupation with the possible phone call that could spell disaster for a member or, perhaps, the province or congregation, is real and often interferes with appropriate attention to other mission concerns.

Externally, much of the hope and optimism that marked relationships with the institutional church are now strained. The abuse scandals of the past few years have not only tarnished the image of clergy and religious but also served to highlight the shadow side of the church: maintenance of a culture of secrecy and control, the excessive focus on appearance over substance, and the denial of the importance of attention to dimensions of human growth and development in its ministers. The prophetic actions of men’s congregations in responding to the crisis contrast with those of their diocesan counterparts.

In light of all this, it is not without some irony that the numbers of lay women and men involved in church ministry and ministry training programs has grown exponentially. There is a growing sense that, in many places, Catholic faithful are coming to understand the meaning of their baptismal call and commitment. Peter Steinfelds noted, in his introduction to *A People Adrift*,<sup>2</sup> that “[t]oday the Roman Catholic

<sup>2</sup> Steinfelds, Peter. (2003) *A People Adrift*. New York: Simon & Schuster.

Church in the United States is on the verge of either an irreversible decline or a thoroughgoing transformation.” As in ages past, religious congregations and their members – if they are to be faithful to the overall charism of religious life – have the opportunity, even the obligation, to play a significant role in this transformation.

## **The Handwriting on the Wall**

I have often been asked about whether I have seen congregations that have responded well to the FORUS study. As noted above, I cannot claim to know what all congregations have done, nor can I sit as judge of what groups have or have not attempted – yet alone accomplished. We do know that we are facing a future that will be very different – different beyond our dreams or imaginings. Any “responses” made to the FORUS report, or any other call to revitalization or enlivening, will be in vain if they do not prepare us for a future that will be close to unrecognizable to those holding to images reminiscent of religious life as known in our lifetimes – however short or long they may be.

While we have been saying this for seemingly decades, we are coming to “know” this in a visceral and experiential manner. Some congregations, for example, have passed significant milestones in their membership figures: groups that formerly numbered close to 300

members note that their current membership numbers fewer than 100. Or, congregations that have historically numbered over 1,000 mark a death or departure that brings them to fewer than 500. For another group, a close look at demographics revealed to a group of 520 that, in less than 20 years (barring a drastic shift in entrance trends, early deaths or departures), ten members in a congregation projected to number 250 will be younger than 70 years of age. While seeking to avoid the temptation to think solely in terms of diminishment, leaders cannot ignore the fact that, for the foreseeable future, numbers will be significantly smaller and the majority of our members older. Given this scenario, the temptation will be to focus attention in issues related to aging, retirement, and health issues of members. Those among us who are young and possess energy for ministry also need the attention of leaders and the gift of wisdom gleaned from experience. Bridging the apparent gap between various age groups and levels of experience will enable the gift of religious life that has nurtured the church for decades to continue as a vibrant force – in a new incarnation – in this millennium.

## **The Experience of Transformation**

Before concluding, some reminder of possible responses to the experience of transforma-

tion may be in order. Leaders may note here what they have already observed, and what they might anticipate – and the fact that paschal mystery themes of life-death-resurrection permeate these basic psychological dynamics.

1. Shock: members are stunned by changes; shock is typically experienced when change is unanticipated – even when it could have been foreseen.
2. Paralysis: members are unable to move or mobilize energies in response to experienced change.
3. Defensiveness: members may feel guilt for “wrongful” actions that necessitated change or a sense of failure for not having been able to maintain status quo – even in situations when status quo was impossible or undesirable to maintain.
4. Denial: members refuse to acknowledge that change is necessary – or that change has occurred.
5. Loss: members experience the change as loss – usually there is some reality basis for this.
6. Anger: another stage of the loss process; change is disruptive and members express their displeasure.
7. Fragmentation: different elements of the community respond differently to change; some embrace it, others resist; members may “organize” into different camps.
8. Ambiguity: members experience and act out a lack of clarity about their reality.

9. Disorientation: members appear “lost” and unable to function at a variety of levels.
10. Death: members experience the end of what was, and are unable to envision another way of life.
11. Rebirth: members experience newness in their organizational life; hope is reborn and resurrection – not resuscitation – is experienced.
12. Conflict: members act out differences, variations in perspective; members seek control over varying aspects of community life
13. Satisfaction: members experience pleasure in the change; oftentimes, this change has been long in coming and sought by many.
14. Anticipation: members approach the change with expectation(s); this may be delight or dread.

### **Commitment: A Future Full of Hope**

Perhaps the most important task of today’s religious leader is to call forth the hope of his or her members and fan into flame the embers of passion and commitment to the mission of Jesus. Embracing the reality that this, indeed, can be either or both the best and the worst of times calls religious to the prophetic stance of addressing the gap between the Gospel and the culture (of church and society). We must do this with a vision that does not cling to what was – either in fact or in our post-Vatican vision but,

which, in the truest sense of resurrection, seeks out, welcomes and nurtures the post-renewal life that is to come as God's gift to the church in the varied forms of religious life in this twenty-first century.

In going forward, we must recall that hope is not determined by our experience. It is the ability to see the creating, loving, saving, real presence of God in the midst of whatever reality happens to be. We must

be attentive to the difference between genuine hope and false optimism, between genuine hope and narcissistic vision, and between genuine hope and the desire to satisfy individual needs.

We need not know all that the future will hold. We need only to be courageous and committed in daring to move around that next bend on the journey. To do this,

***[w]e will need courage. We will need energy. We will need vision.***

***We will need to be at ease with ourselves and our decisions.***

***Above all, like the psalmist, we will need to keep "our eyes fixed on the Lord, our God," until God lets us rest.***

***And then we will know, as we have always known, that the effort was worth the gift of our lives, the best of our years, the length of our days<sup>3</sup>.***

<sup>3</sup> From the writings of Clare Dunn, CSJ, and Judy Lovchik, CSJ (Carondelet, Los Angeles).