

GUIDELINES FOR THE JESUITS AND THEIR COLLEAGUES IN THE MINISTRY OF THE
SPIRITUAL EXERCISES IN THE USA & ENGLISH SPEAKING CANADA
(Revised October 12, 2009¹)

From the Jesuit provincials of the United States and English Speaking Canada

We, the Jesuit provincials of the United States Assistency together with the Jesuit provincial of English Speaking Canada, recognize that the *Spiritual Exercises* of Saint Ignatius Loyola are a gift of the Holy Spirit to the whole Church. We realize that the Society of Jesus bears a special responsibility to preserve this gift and to promote its authentic use in its many applications and adaptations.² Furthermore, we recognize that the spirituality and world view of the *Spiritual Exercises* inform all of the ministries and apostolic institutions of the Society. Therefore, we offer to Jesuits and our partners the following guidance for this ministry.

Care for and promotion of the *Spiritual Exercises* are collaborative efforts involving Jesuits and many others. The leadership, staffing, and governance of Jesuit-affiliated apostolic works, whether spirituality centers or educational institutions, are accomplished by lay persons, Jesuits, clergy, and religious working together.

We expect that Jesuit formation will include an understanding of the structure and dynamics of the *Spiritual Exercises* and the preparation to give them in one or more modalities. In addition, efforts must be made to assist our partners in ministry with appropriate formation in the *Spiritual Exercises*.

We encourage Jesuit sponsored ministries to collaborate with other associations engaged in the ministry of the *Exercises*, especially the Jesuit inspired networks of lay persons who give the *Spiritual Exercises* in daily life. As far as possible, the Society of Jesus seeks to offer guidance, training, and support for these associations. The Jesuit Conference shall promote regular conferences and workshops on Ignatian spirituality in general and on the adaptation and the application of the *Spiritual Exercises* in particular.

Finally, we ask those Jesuits and Jesuit affiliated works whose ministry is giving the *Spiritual Exercises* to adopt the following guidelines. In keeping with the Principle and Foundation, use each guideline to the degree that it furthers the ministry.

This set of guidelines is to be reviewed in five years — October 12, 2014.

¹ This document was formally adopted by the Jesuit Provincials of the United States and English Speaking Canada at their tri-annual meeting in October 12, 2009.

² This document distinguishes the terms “application” and “adaptation” according to the vocabulary of the *Spiritual Exercises*. “Application” refers to the act whereby an exercitant performs one or more of the specific exercises as intended in Ignatius’ text. “Adaptation” refers to the practice of modifying one or more of the exercises or movements of the Exercises to fit the particular circumstances or capabilities of the exercitant. Annotation 18 defines and encourages “adaptation.”

A. Guidelines for Those Who Give the Spiritual Exercises

1. Personal Spiritual Formation — Those who would give the *Exercises* to others will
 - a. have completed the full four “weeks” of the *Spiritual Exercises* under annotation 19 or 20 (testified to by the director);
 - b. be in personal spiritual direction and making an annual retreat for at least two years;
 - c. have discerned a call to this ministry;
 - d. be a fully initiated Roman Catholic in good standing for at least three years or a similarly invested member of another Christian denomination who is respectful of, and comfortable with, Roman Catholicism.

2. Intellectual formation — Those who would give the *Exercises* to others will have
 - a. received basic instruction on the structure and dynamics of the *Exercises*;
 - b. familiarity with the “text” of the *Exercises*;
 - c. a basic understanding of the study of Sacred Scripture, especially of the New Testament;
 - d. a basic understanding of Theology (especially Theology of the Trinity, of Christ, of Salvation, of morality, and of the Church).

3. Professional Preparation — Those who would give the *Exercises* to others will have
 - a. received one-on-one mentoring³ and supervision⁴ by an experienced director through two retreats for those who give individually directed retreats;
 - b. received mentoring by an experienced preacher for at least two retreats, for those who give conference retreats;
 - c. basic pastoral counseling skills, e.g. listening skills;
 - d. training in preaching for those who give conference retreats.

Note: A person who does not have all the formal training above but has been competently practicing in this field for some years can be recognized as having equivalent competence, knowledge and experience.

³ “Mentoring” is understood as the process whereby an experienced retreat director coaches, instructs, and guides a neophyte director.

⁴ “Supervision” is here used in the sense in which the word is generally used in the helping professions. It refers to a practice whereby the retreat director reflects on and processes with another professional his/her own interior experience while giving a retreat.

4. Continuing Education/Formation — Those who would give the *Exercises* to others will
 - a. participate annually in a conference, formal course, workshop, or other structured program on spiritual ministry;
 - b. do regular reading in spirituality and religion;
 - c. maintain on-going supervision⁵ (one-on-one, group, peer, or with the retreat center director);
 - d. make a personal annual retreat;
 - e. continue to receive spiritual direction.

5. The Practice of Giving the Exercises — Those who give the *Exercises* to others will
 - a. observe standard professional boundaries with regard to relationships, setting, place, content, etc.;⁶
 - b. strictly observe confidentiality⁷ (as limited by mandated reporting laws⁸);
 - c. consult and refer⁹ when entering areas of unfamiliarity or non-competence (e.g., emotional or psychological disorder);
 - d. be faithful to the content of Ignatius’s *Spiritual Exercises*, regularly reviewing the “annotations” and “rules”;
 - e. evaluate each retreat carefully.

⁵ see footnote 3 above.

⁶ The Jesuit Conference recommends the Spiritual Directors International Guidelines for Ethical Conduct.

⁷ Nothing learned from the directee, including the directee’s name, may be disclosed to another without the directee’s permission. The director must inform the directee that he or she (the director) is being supervised and will make every effort to protect the directee’s identity.

⁸ These mandated reporting laws vary by state.

⁹ When dealing with psychological or emotional issues that impair a directee's judgment (e.g., trauma or addiction), the director may, with permission, consult a professional or may recommend that the directee see a clinician or specialist.

B. Guidelines for Jesuit Retreat Houses and Spirituality Centers

1. Mission: The Jesuit Retreat House or Spirituality Center
 - a. has a formal vision/mission statement;
 - b. concentrates its programs on the *Spiritual Exercises*, their application and adaptation;
 - c. reviews and applies directives from the General Congregations (including ecumenical and interfaith dialogue);
 - d. reviews and applies province and assistancy apostolic priorities;
 - e. employs a process of review and application for new program development with appropriate evaluation;
 - f. has programs that reflect the mission of the house/center, responds to the needs of the local and universal Church, and seeks to meet the needs of various generations and cultures;
 - g. has approved safe environment programs for ministry, especially to minors and vulnerable adults, according to the province and diocesan policies.
2. Liturgical Life: The liturgies celebrated in the house or center
 - a. reflect good contemporary Church practice consistent with local diocesan norms;
 - b. support and enhance the programs of the house/center;
 - c. model good sacramental liturgy (Eucharist, Anointing, & Reconciliation);
 - d. foster a prayerful environment for the programs in the house or center.
3. The practice of Ignatian Conference Retreats
 - a. renews and deepens the retreatants' life of faith and practice of religion;
 - b. is an application of Annotation 18 and should include both an effort to dispose the retreatants to graces of Ignatius's *Spiritual Exercises* and instruction in living the Christian faith;
 - c. is carefully adapted to the group, with respect to stage of life, gender, socio-economic status, ethnicity, culture, etc.
 - d. encourages retreatants for further grow in their spirituality (e.g. 19th annotation, weeks of director prayer, etc.).
4. Viability: The Jesuit Retreat House or Spirituality Center
 - a. attracts a population of retreatants that reflects the Church in the region and supports continuing growth;
 - b. engages in strategic planning;
 - c. works toward adequate financial resources and systems of accountability to maintain the facility and to support the mission;
 - d. has competent and responsible financial management;
 - e. conducts fund-raising for program and capital needs;
 - f. successfully advertises and promotes the sponsored programs;

- g. has buildings and grounds that are
 - i appropriate to the mission,
 - ii welcoming,
 - iii safe and well maintained,
 - iv clean and attractive,
 - v renovated and improved to support the evolving mission.
5. Leadership: The leadership of the Jesuit Retreat House or Spirituality Center
- a. is structured to meet the mission and particular needs of the institution;
 - b. includes an effective board that exercises, in partnership with the province, responsibility for the ministry;
 - c. animates staff, volunteers, and retreatants in analysis, problem solving, and planning for the future effectiveness of the ministry.
6. Staff: The pastoral/ministerial staff of Jesuit Retreat Houses and Spirituality Centers
- a. has qualifications consistent with *Guiding Guidelines*, Part A;
 - b. is guided by policies that are clear and provided to all the staff (i.e., provided in a staff handbook that includes policies on professional conduct, hiring, terminations, etc.);
 - c. receives just compensation;
 - d. receives support for continuing formation/education;
7. Evaluations:
- a. The institution uses evaluation instruments completed by attendees¹⁰ and visiting directors, reviews the data, and makes changes based on the data.
 - b. The staff annually reviews its ministry and implements changes based on self-evaluation and client-evaluation.
 - c. The director of the institution assures the evaluation of staff.
 - d. The board and/or province representative assures the evaluation of the director.
 - e. The province engages in annual evaluation of the institution and its ministry.
8. Administration: Those in leadership in Jesuit-sponsored ministries will
- a. have received training in administration and management;
 - b. have received initial and ongoing formation in Jesuit spirituality and mission;
 - c. observe professional guidelines;
 - d. work collegially with boards, staff, and provincial representatives;
 - e. receive ongoing professional development.

¹⁰ For 19th and 20th Annotation Retreats, the director will be evaluated by his or her directee.