

Build on Formation's Powerful Experience

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*"Formation changed my life." "I see things differently now."
"I am a better parent because of this experience."*

Enthusiastic statements like these stunned me when, years ago, I began leading formation groups. The goal was to help leaders pass on the Catholic health care tradition, not change their lives. Yet many participants said that's what was happening. Today I have come to expect that although most formation participants will say the program improved their leadership, some also will say it was life-changing.¹

In the last decade, we have increased our understanding of the content and structure needed in order for a formation program to develop leaders' appreciation for the heritage and mission of Catholic health care.² But we have not as fully explored formation's personal development side. Because we know formation programs offer a powerful personal experience, we not only should take that into account, we should build on it.

FORMATION BROADENS WHAT WE SEE

There are a variety of reasons why a formation program might result in a profound, even life-changing experience. Principal among them is that the participants, who are mostly in their middle years, already are asking important life questions. Their comments make it clear that formation helps them in two fundamental ways: They are able to gain a broader perspective or viewpoint on both their work and their personal lives, and they develop a deeper sense of personal purpose and calling.

Formation changes what they see and what they seek.

Leaders' perspectives expand when they appreciate more fully that they are helping to write the current chapter of a centuries-old story. Their work looks beyond next quarter's quality assessment or the annual financial statement. Formation helps them appreciate that they not only are serving their communities today, they are lay-

ing the foundation to serve future generations. Their time horizon becomes more expansive, as does their understanding of their work. Usually businesses focus their attention on serving the individual customer, but Catholic health care also strives to serve the larger common good. It leaves no room for a narrow vision.

Spiritual traditions remind us that in the middle years — the space occupied by most formation participants — we naturally question how our lives and work fit into a bigger picture. "Does my effort count for anything more than what is in front of me right now?" we tend to ask ourselves. Formation takes leaders to the mountaintop where they gain a broader vision of the work they do and how their efforts contribute to the big picture. The vision from that perspective is energizing.

FORMATION DEEPENS WHAT WE SEEK

Central to the formation experience is the opportunity to reflect on the heritage, mission and values of the ministry. Who are we? Why do we do this work? What guides our actions? Exploring these questions about the ministry invites parallel questions about one's own life. Who am I? Where am I going? How should I act? That kind of examination naturally flows into thinking about what to do with one's life, talent and energy.

By raising these questions, formation feeds the natural desire for our lives to make a differ-

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ence — the universal human quest that psychiatrist Victor E. Frankl, MD, PhD, called “the search for meaning” and philosopher-theologian Fr. Bernard Lonergan, SJ, named as achieving personal authenticity through self-transcendence.³

Exploring these questions draws participants like a magnet. Listening to the inspiring stories of the ministry’s founders and reflecting on the mission they share, participants grow in understanding that they are doing more than delivering health care, as important as that is. They appreciate that the broader mission is to help make their part of the world better. Asking, “What I am doing in this ministry and in my life?” has significance beyond self, and the larger sense of purpose changes what one seeks, which can change everything.

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IMPLICATIONS FOR FORMATION ACTIVITIES

For the participants in formation programs, the organizational and personal dimensions are inseparable. That connection was not as clear to those of us who were putting together formation programs in the early days.⁴ Twenty years ago, when we were planning the pilot formation program for Providence Services, a wise sister summarized what we wanted to explore as basically three questions: “Who is Providence?” “Who am I?” and “Who are we together?” That’s it in a nutshell. Today we understand that the “Who am I?” question is not an accidental by-product of the formation experience, but a constitutive element. This realization has crucial implications for what we do in formation and how we do it.

We need to recognize the importance of that personal dimension and plan for it. For example, participants need regular times during formation sessions for personal reflection. Dialogue with cohort colleagues about formation topics is important, but not sufficient. Some traditional retreat-like elements help, such as giving participants questions to consider and following that with a time for quiet reflection and, perhaps, journaling.

As the group develops a sense of community, there need to be ground rules established so that participants feel free to share personal experiences.⁵ Structured exercises can prompt their

thinking about such topics as how they came to their current roles, what is important to them at this stage of their lives, and how they would like to grow both personally and in their leadership.

Helping leaders reflect on what is important to them is a natural complement to learning what is important to the ministry.⁶ Addressing the personal dimension requires thoughtful planning so that the opportunities and exercises are not random but, instead, are relevant throughout the formation program.

FORMATION LEADER SKILLS

Effectively addressing both the organizational and personal dimensions requires those who lead formation to have highly developed qualities and skills. To begin with, all formation leaders must be able to establish immediate rapport and credibility with the participants, nearly all of whom are senior leaders in their fields. That means the formation leaders themselves ordinarily should have significant professional and life experience. Conducting formation sessions for senior leaders is not work for beginners.

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The formation leaders must appreciate that their assignment is not to cram as much information as possible into their sessions. This is not a conventional class; participants are not preparing for final exams. There must be spaces for conversation and personal reflection, and all formation leaders must be comfortable and skilled in facilitating those spaces.

All formation leaders must understand the health care world. While having had a career in health care is not necessary, any formation leader, even a guest speaker, must be able to show the relevancy of his or her topic to the participants’ day-to-day activity. A goal of formation is to help the participants’ connect mission and values with their own work and to help their staffs do the



same. Formation leaders should model the ability to make those connections.

CONTENT SPECIALISTS

A formation program needs to be led by people who possess one or (rarely) both of two complementary and distinct skill sets. The first is simply the ability to present the content effectively, whether the topic is the history of the ministry, the Catholic social tradition or ethical decision-making. It is the content that helps participants appreciate the roots and the breadth of the Catholic social tradition in general and health care in particular. The content enables participants to encounter a tradition that is more than 2,000 years old and to understand how the ministry fits into this bigger picture. The content elements

broaden participants' perspective.

The second skill is the ability to translate the subject into language participants can understand, use examples relevant to their world, and show how the subject fits into a larger picture. Formation programs commonly ask guest speakers, who are specialists in their fields, to present content elements. By offering different voices and points of view, guest presenters can contribute to the richness of the conversation — but only if their parts are integrated with the whole.

In the early days of formation, we wanted to engage the best content experts, who often were university professors. We quickly learned that being an expert in a field did not necessarily include the ability to translate the expertise into language and examples the participants could grasp in a short formation session. Without that translation, the expertise was lost and the session suffered.

It indeed takes skill to help participants see how a topic fits into a larger picture of the Catholic health care mission. Because formation participants come from educational backgrounds as diverse as nursing, accounting, medicine, law and administration, they likely have varied life experiences and their own deeply felt spiritual and religious beliefs. Most are not familiar with theological language or the Catholic Church. That means when a presenter uses insider or church language, it can come across as irrelevant at best and proselytizing at worst.

For example, a friend of mine was participating in a formation program in another system and asked me about one of his reading assignments. It said people are called to work in Catholic ministry not because they are priests or religious, but because they are baptized. My friend, who had spent years in Catholic health care, is a Jew. He felt the reading devalued his service because he was not Christian.

This happened years ago, and presumably such a reading would not be assigned today unless it were carefully explained. Still, this unfortunate episode illustrates the importance of planning for diverse participants and using language relevant to them.

When the Catholic health care tradition is presented in language the participants understand and is illustrated with examples they can relate to, the effect is cumulative and the impact is powerful. Participants experience how the values of the ministry resonate with their own. They can

see themselves as full partners in the ministry's work, regardless of their professional training or personal spiritual traditions.

FORMATION GUIDES

Another set of skills characterizes formation leaders who might be called guides. These are leaders who stay with participants throughout the program, help connect the content elements and lead conversations on the participants' role in the Catholic ministry. This work is essential yet sensitive. For years I have had the privilege of watching and working with highly skilled formation guides. Here are some of the qualities that make them so effective.

Their level of personal engagement with the participants is striking. By the end of the first session, they can call participants by name and are beginning to learn about each person's background and role in their ministry. Without prying, they simply pay attention, inviting natural, collegial conversation. They make clear by their interest and engagement that they care about the participants and want each one to have a positive experience. Nothing about these guides is aloof.

Experienced formation guides are experts in building the community that formation requires, and they start from Day 1. As they invite conversation and get to know the group, they also help the group get to know each other. They make it look effortless. Over the course of the program, and, when appropriate, they make connections among participants by acknowledging milestones in participants' lives like a promotion, a new child or grandchild, or personal loss. In an easy and natural way they help participants appreciate each other, not just as individuals, but as fellow travelers on an important journey. With the skill of the formation guide, the cohort moves from a collection of mostly strangers to a true formation community.

Another characteristic of the guides is their ability to welcome the variety of religious and spiritual perspectives of the participants. Their appreciation for different traditions enables them to draw upon examples and stories from multiple spiritual sources. Participants feel welcomed regardless of their backgrounds, and they are helped to draw parallels between their own values and traditions and those of the Catholic ministry. Skilled guides bring different perspectives together so naturally that any barriers or concerns participants might have felt at the beginning of

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the program simply melt away. The guides make clear formation has no second-class participants.

To create such a welcoming atmosphere requires not only skill in group processes but also spiritual depth. Hard questions will arise, for example, about some customs of the Catholic Church or its public failings. Answering these questions honestly and without defensiveness requires a deep understanding of and appreciation for the tradition. There is no dodging questions when standing in front of 50 seasoned health care leaders. Skilled formation guides can turn a tough question into an opportunity to explore the tradition — both its good works and its flaws. Answering without defensiveness or “spin” opens participants to a richer appreciation of a ministry that, despite its human frailty, is always striving to advance the common good. Participants of any background can embrace that.

To create such a learning environment requires that formation guides communicate the theological and historical roots of the ministry in ordinary, street language. What enables the effectiveness of these guides is not their ability to parse theological questions as a scholar might, but to answer as one who has lived in the tradition, understands its gifts and weaknesses and is faithful to it.

Skilled formation guides are adept at adjusting quickly to the shifting needs of the group. They have a plan for each session, but they can make changes on the fly. They sense whether the group is ready to move ahead or needs more time to consider a topic. A less experienced group leader is tempted to stick with the script, but a skilled formation guide knows when the script needs to be rewritten on the spot. The best formation guides make the adaptation look so seamless the participants don't know it has happened.

The guide's skills and personal qualities help build the participants' trust. They know the guide has no agenda except to help them. Guides are not offering counseling or therapy but are simply inviting an inner conversation that helps

participants move to a deeper understanding of who they are and what they do. They create a safe space for participants to explore the “Who am I?” question. That exploration can lead to both personal and leadership growth and even to a life-changing experience.

To be an effective formation leader is a tall order. Abilities like facilitation, understanding the health care world and avoiding insider language can be developed. Personal qualities like empathy, adaptability, openness and passion for the mission come from years of lived experience. The formation guides need exceptional emotional intelligence, communication skills and a personal commitment to the mission. How to identify and develop inspirational formation leaders is beyond the scope of this article, but we know these leaders are essential for successful formation programs, and we will need more of them in the future.

CONCLUSION

Our experience confirms that formation accomplishes more than passing on the Catholic health care tradition. It changes lives. The Pentecost story tells of people from different countries with different languages hearing a message they all could understand. Without overstating the parallels, something similar seems to happen in formation. Our participants come from diverse professional backgrounds and spiritual traditions, yet they experience something powerful, and for some it is life-changing. They tell us that formation helps them to see a bigger picture, to reflect more deeply on their lives and work, and even to dream of possibilities. Formation invites them to help make that dream a reality, not magically or immediately, but consistently, methodically and faithfully.

The last decade has seen us leave the infancy of formation and enter the exciting time of its adolescence. Who knows what unexpected gifts will come with adulthood?

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NOTES

1. For descriptions of the personal impact formation participants have reported, see Laurence J. O’Connell and John Shea, “Ministry Leadership Formation: Engaging with Leaders,” *Health Progress* 90, no. 5 (September-October 2009): 34-39.

2. See: Brian Yanofchik, “A Preview: CHA’s Framework for Leadership Formation,” *Health Progress* (September-October 2011): 7-11.

I drew a distinction between the elements of leadership development and leadership formation in John O. Mudd, “When Knowledge and Skill Are Not Enough,” *Health Progress* 90, no. 5 (September-October 2009): 26-32.

The content and approach used by the Ministry Leadership Center over a decade is detailed in Laurence J. O’Connell and John Shea, eds., *Tradition on the Move: Leadership Formation in Catholic Health Care* (Sacramento: MLC Press, 2013).

3. Victor Frankl, *Man’s Search for Meaning*, (Boston: Beacon Press, 1959); Bernard Lonergan, *Method in Theology* (Toronto: University of Toronto Press, 1971), 104.

4. Yanofchik, “CHA’s Framework.” Also, see O’Connell and Shea, eds., *Tradition on the Move*.

5. Mary Anne Sladich-Lantz describes the safe-place requirement in “Facilitation / Resource in Leadership Formation,” Laurence J. O’Connell and John Shea, eds., *Tradition on the Move: Leadership Formation in Catholic Health Care*, 210.

6. John Shea, one of the formation pioneers, summarizes this personal dimension:

“The formation process is creative when it holds together the personal and the professional sides of the leader. When leaders see their personal selves in the concerns of the tradition, they begin establishing strong ties to the organizational culture. For example, in the Vocation session, leaders often comment that their work has always had a vocational character, but that they never gave it credence until they saw how important it was to the organization. Or, from the Responding to Suffering session, leaders return home to sick family members or neighbors with a desire to be present to them. In short, through their formation they are becoming, by their own estimate, fuller and better people. This is perhaps the highest compliment a formation program can receive.” John Shea, “The Process and Content of Leadership Formation” in Laurence J. O’Connell and John Shea, eds., *Tradition on the Move: Leadership Formation in Catholic Health Care*, at 84.

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