

# HORIZON



JOURNAL OF THE NATIONAL RELIGIOUS VOCATION CONFERENCE

VOLUME 35, NUMBER 2

WINTER 2010

## PSYCHOLOGICAL ASSESSMENT OF APPLICANTS

Psychological assessment: why, what and how to assess By RONALD J. KARNEY .....	4
Tests for assessing applicants to religious communities By ERIC D. HAAS.....	10
Vocational discernment and the psychological report By SISTER MARY M. LINDSAY, SSJ.....	18
Assessment with cross-cultural candidates By FATHER GERARD J. MCGLONE, SJ AND FERNANDO A. ORTIZ.....	24
What happens with the assessment? By SISTER MERCEDES J. MCCANN, RSM.....	31
When the vocation minister assesses: seeking consistent belief, word, action By SISTER CINDY KAYE, RSM .....	35
Establishing and honoring boundaries in vocation ministry By CHRISTY SCHILLER.....	41
Book Notes: Young Catholic women speak up; a sister reflects on a life of service By SISTER KAREN OWENS, SSJ AND CAROL SCHUCK SCHEIBER.....	45



## Finding it hard to keep up on current events?

Looking for fresh insights and ways to connect Sunday scripture to contemporary life?

**Prepare the Word** is the perfect preaching and formation resource for busy religious

This **unique online service**, offers a weekly **Exploring the Word** update each Monday by noted scripture scholar Alice Camille and a **Preaching the News** update each Thursday compiled by our veteran Catholic editors that presents the week's news in light of the Good News.

**Other features available each week:**

- daily scripture reflections
- Sunday summaries
- fact of the week and quote of the week
- monthly overviews of pastoral trends
- story starters, prayers, preaching tips, and reflective essays/homilies for all occasions.

**Gain fresh insights as you explore the Word**

**Call now to subscribe:  
800-942-2811**

**Prepare the Word** is timely, insightful, comprehensive, and easy-to-read.

**Find the Good News in the week's news**

**Prepare the Word** is an ideal aid for homily preparation, faith sharing, Bible study, religious education, faith formation, and personal reflection.

Call now to subscribe and gain access to **PrepareTheWord.com** for only one dollar per week (\$52 a year). Each week you will receive a Monday and Thursday morning e-mail notice when the newest content is posted—just in time for preparing a sermon, lesson plan, or weekly topics for discussion.



**www.PrepareTheWord.com**

# HORIZON



## JOURNAL OF THE NATIONAL RELIGIOUS VOCATION CONFERENCE

HORIZON is published quarterly by the National Religious Vocation Conference,  
5401 S. Cornell Avenue, Suite 207, Chicago, IL 60615-5698; (773) 363-5454 phone; (773) 363-5530 fax  
nrvc@nrvc.net www.nrvc.net

Executive Director  
Brother Paul Bednarczyk, CSC

Editor  
Carol Schuck Scheiber

Proofreaders  
Sister Mary Ann Hamer, OSF, Virginia Picuch

Editorial Advisory Board  
Sister Anita Baird, DHM; Sister Carol Mucha, RSM; Father Kevin Nadolski, OSFS;  
Father Kenneth O'Malley, CP; Joel Schorn; Father Anthony Vinson, OSB

**SUBSCRIPTIONS**  
\$27 each for one to five (\$34 international)  
\$25 each for six or more (\$32 international)  
Single copies are available for \$11 each. Please direct subscriptions, renewals and changes to the NRVC office.

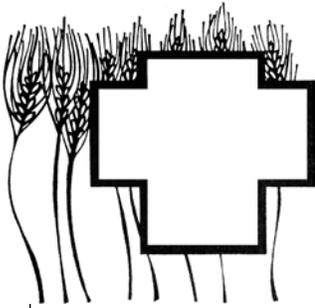
**REPRINTS**  
Permission is granted to distribute up to 50 copies of HORIZON articles for noncommercial use.  
Please use the following credit line: Reprinted with permission from HORIZON, journal of the National Religious  
Vocation Conference, www.nrvc.net. For other types of reprints, please contact the editor at cscheiber@nrvc.net.

**EDITORIAL INQUIRIES**  
All editorial inquiries, including article proposals, manuscript submissions and requests for writer's guidelines should  
be directed to the editor: Carol Schuck Scheiber, HORIZON editor, cscheiber@nrvc.net.

**ADVERTISING**  
For advertising rates and deadlines, contact Debbie Prieto at daprieto@nrvc.net

**POSTMASTER**  
Send address changes to HORIZON, 5401 S. Cornell Ave., Suite 207, Chicago, IL. 60615-5698.  
Periodicals postage paid at Chicago, IL, ISSN 1042-8461.





# HORIZON

HORIZON began as a vocation journal in 1975. Today, as a quarterly publication, it serves a readership of more than 2000 in the U.S. and other English-speaking countries.

HORIZON serves as a resource:

- To assist vocation directors in their professional and personal growth as ministers;
- To educate and engage educators, directors of retreat centers, formation personnel, community leadership, bishops, campus ministers, librarians, priests, religious, laity, and anyone interested in vocations and their role in vocation ministry.

HORIZON has a threefold purpose:

- To provide timely and contemporary articles relative to vocation ministry;
- To provide an opportunity for the exchange of ideas on pertinent issues in the field of vocations;
- To highlight some of the current resources available.

## National Religious Vocation Conference

HORIZON is published by the National Religious Vocation Conference (NRVC). The NRVC is an organization of men and women committed to the fostering and discernment of vocations. It provides services for professional vocation directors and others who are interested and involved in vocation ministry. It proclaims the viability of religious life and serves as a prophetic, creative, life-giving force in today's church.

To accomplish this, NRVC provides opportunities for professional growth and personal support of vocation ministers; facilitates regional, area and national meetings for its members; sponsors workshops, seminars, conferences and days of prayer; publishes materials related to vocations for a wide variety of audiences; engages in research, study and exchange on issues of current concern; publishes a quarterly professional journal, HORIZON; maintains a Web site; and cooperates with other national groups essential to the fostering of vocations. For further information, contact: NRVC, 5401 S. Cornell Ave., Suite 207, Chicago, IL. 60615-5698. E-mail: [nrvc@nrvc.net](mailto:nrvc@nrvc.net). Web: [www.nrvc.net](http://www.nrvc.net).

## National Religious Vocation Conference Board for 2009-2010

Brother Paul Bednarczyk, CSC	EXECUTIVE DIRECTOR	Sister Barbara Kwiatkowski, OSF	REGION 7
Sister Josita Colbert, SNDdeN	REGION 1	Sister Angele Lewis, SNDdeN	REGION 1
Father Kevin DePrinzio, OSA	REGION 3	Father Martin Lukas, OSFS	REGION 6
Sister Charlene Diorka, SSJ	BOARD SECRETARY	Sister Marcy Romine, OSF	REGION 9
Sister Margaret Michael Gillis, FSP	REGION 1	Father Anthony Vinson, OSB	REGION 7
Mrs. Maryellen Glackin	REGION 3		

# EDITOR'S NOTE

## Midwinter encourages the inward gaze

*In the bleak midwinter, frosty wind may moan. Earth stood hard as iron. Water like a stone.*

**T**he old English Christmas song gets the mood right, not so much for Christmas, I've always thought, as for the season that follows it. Regular time. The festive apparel put away, our decorations boxed up and out of sight, now in the bleak midwinter, it's back to business.

If your "business" is vocations, the contemplative spirit of wintertime may provide the perfect opportunity for vocational introspection. Here in the north where the hibernating outdoor world is cold and quiet, it's natural to turn inward. There both vocation minister and discernor alike can ask important questions: where is God leading me? Is this discernor right for our community? Is he or she healthy in mind and spirit?

A healthy mind and spirit is important. While the science of psychology in its present form is relatively new to religious life, the concept of mental and spiritual well-being is not at all new. From the earliest days of religious life, communities have sought members who were emotionally and mentally sound. The rigors of formation, the strains of community living and the challenges of ministry sometimes test an individual to the core. A strong foundation is important, and the science of psychology may provide guidance and wisdom for understanding that foundation.

Most vocation ministers seem to follow a similar pattern when it comes to assessing new members:

- They meet with a candidate on several occasions in order to get to know him or her.

- If the person is interested in more serious discernment and worthy of consideration, the vocation minister continues to informally assess the candidate's potential for religious life through observation and conversation.
- Once the person formally enters the application process, he or she undergoes various forms of assessment, which in most cases includes psychological testing by a licensed psychologist.

While it all sounds straightforward enough, the process has many nuances, and the vocation minister is responsible for guiding the entire series of steps. This edition of *HORIZON* is aimed specifically at the process of assessment, particularly psychological testing by an outside professional. A psychologist's assessment can hold great significance for both the candidate and the community. This edition contains articles to help vocation ministers understand the context of assessment, how to find a qualified assessor, what to ask for, what the tests can reveal about a person, how to handle information gleaned from an assessment, etc.

These quiet months when we want to linger near the hearth are a good time to ask internal questions. We hope that this edition of *HORIZON* helps you ask the right questions to ensure a fruitful assessment and, ultimately, a vigorous community.



—Carol Schuck Scheiber, Editor, [cscheiber@nrvc.net](mailto:cscheiber@nrvc.net)

For most religious communities in the U.S. today, an important step in the entry process is a psychological assessment. Why make this assessment? What can it tell communities? And how does the vocation minister proceed?

# Psychological assessment: why, what and how to assess

By RONALD J. KARNEY

**T**ODAY'S VOCATION DIRECTOR is faced with the daunting task of not only inviting applicants who may be experiencing a calling to religious life, but at the same time ensuring that the applicant is psychologically stable, well developed, mature and capable of entering into a process of discernment and formation leading to religious life. Often, vocation directors are chosen for their youthful energy with the expectation that they will relate well to young adults. They are well-versed in the mission and charism of the community and are aware of the needs of the community. However, over the years of assessing applicants, many new vocation directors express concerns regarding the psychological assessment. It is not uncommon for new vocation directors to approach this requirement for admission with fear, trepidation and uncertainty. When asked what they are looking for in an applicant in terms of a psychological assessment, many struggle to articulate anything specific and

often reply with a simple “just a psychological” or “whatever you usually do.” It is crucial for vocation directors to have a basic understanding of the assessment process and how it can be used for candidate selection and formational development. For many vocation directors a professional psychological assessment provides objective insight into his or her own understanding of the candidate’s psychological well-being. Often, an assessment by a licensed psychologist takes place after the vocation director conducts a behavioral assessment. The two sets of information create a more complete picture of the candidate’s maturity and well-being.

## Basic elements of assessment

A brief discussion of the basic elements of a professional psychological assessment can help set the stage for understanding how it can be used in vocational selection. Psychologists recognize that the nature of psychological assessment is more than the administration and scoring of psychological tests. A major task force of the American Psychological Association (APA) on the nature of psychological assessments (Meyer, GJ, et.al, 2001) defined a psychological assessment as a complex process in which a psychologist utilizes a variety of psychological measures and tests and interprets the data with respect to the individual’s history, the questions being asked by the referral source, and the behavior that is observed during the assessment process in order to understand the individual and answer the referral questions. This information also needs to be communicated clearly and effectively to the individual and the referral source.

Maximum assessment validity—that is, the degree of confidence one has of the findings—requires that the

---

*Ronald J. Karney, Ph.D. is a clinical psychologist with over 30 years of experience and who has spent the last 20 years focusing on assessment of applicants to religious communities, lay ministry programs, diaconate formation and the seminary. He is the chief psychologist and director of outpatient Services at St. John Vianney Center in Downingtown, PA and maintains a private practice as well. Dr. Karney is on the advisory board for the National Catholic Education Association’s Seminary National Project regarding the use of psychological assessments for seminary applicants.*



psychologist utilize a multi-method assessment battery that encompasses an unstructured interview, structured interview, performance-based personality tests, standardized personality tests, cognitive tests and, when possible, collateral information, often in the form of an observer rating scale. Each of these methods collects data that can lead to a convergence of findings. The multiple findings in turn maximize the validity of the conclusions. At the same time, multiple methods can yield contradictory findings that will require the psychologist to consider, in light of the unique development of the individual, the situation being assessed, and then determine if the inconsistency merits further exploration.

Several elements are present in this understanding of a psychological assessment. First and foremost is the referral question or purpose. Why is this person being assessed? The more specific the answer to this question, the better the psychologist can select a battery of assessment tests to elicit relevant information. Embedded in this element is an understanding of the context for the assessment. Psychologists in the industrial organizational field are often called upon to help major corporations select individuals who can “best fit” into the administrative structure of the corporation. This requires the psychologist to have a clear sense of the cultural components and values of the organization, along with an understanding of how the strengths and weaknesses of the individual would complement and interact with the other members of the organization. In these settings, the psychologist is required to fully understand the corporate climate and value system in order to understand the referral questions being asked.

The second element is the selection of the assessment

battery components.

What types of questions need to be asked during the interview? What information is required through a background history and developmental history? What psychological tests would be most appropriate? Would this approach be cost-effective in terms of time and money? And what collateral data needs to be obtained?

The third element is the professional competence of the psychologist, both in terms of assessment processes and in understanding the nature and purpose of the evaluation. The psychologist's expertise is critical in making certain that the findings are interpretable in terms of sound psychological principles and in an understanding of the situation being presented. The psychologist needs a firm understanding of religious life and the corporate culture of the community.

## The referral question or purpose

To maximize the utility of the psychological assessment, the vocation director should have a clear understanding of what information is being sought. Generally the psychological assessment has two major purposes: 1) to identify those individuals who are at risk of being unable to fully commit to the process of formation or who are at risk of being unable to live the life in a full and committed manner. This is the exclusionary aspect and would cover such issues as severe mental illness or personality disorders that would disrupt community life or the ministries of the community, addictions that could jeopardize the individual or the community if left unchecked, or other developmental issues or behaviors

Why is this person being assessed? The more specific the answer to this question, the better the psychologist can select a battery of assessment tests to elicit relevant information.

---

that could prove problematic. 2) The second aspect of an assessment is to identify the individual's strengths and weaknesses so that the formation team can best maximize the effectiveness of formation. This constitutes the formational focus of the evaluation.

Vocation directors need to share with the assessment psychologist the community's specific exclusionary issues or concerns. For instance, an individual with a schizophrenic

The vocation director needs to make certain that the assessment psychologist understands the nature of the community.... This assists him or her in selecting the tests to be used.

disorder would likely require a lifetime commitment by the community to the individual's mental stability through medication, therapy and a low stress environment. At the same time the community would have to recognize the likelihood of relapses.

Such individuals should

not be accepted into religious life. However, what is the attitude of the community toward an individual who has experienced periodic bouts of depression that can be managed with medication and therapy?

Additionally the vocation director needs to make certain that the assessment psychologist understands the nature of the community. What is the lifestyle? Is it an active community in which each member lives in an intentional community and each member is required to find a ministry position in discernment with leadership? Or is it a cloistered community in which each member is required to take part in a limited range of assignments? How is the vow of obedience lived? Additionally, what is the charisma? What is the current age of the membership? Is there a cohort for this applicant to relate to? These types of questions can assist in making certain that the assessment psychologist has a sense of the nature of the religious community and what would be expected of each member. This assists him or her in selecting the tests to be used and in determining if the personality styles identified are areas of strength or weakness for the individual and the community.

Equally important is the selection of the assessment psychologist. This individual needs to be competent and experienced in psychological assessment principles, test selection, test administration, test scoring, test interpretation,

interviewing, and in communicating the results in an understandable way. The psychologist needs to be licensed to practice psychology, and the license needs to be current. Additionally, the psychologist needs to be familiar with religious life within the Catholic Church, non-judgmental about living a consecrated vowed lifestyle, and familiar with the lifestyle of the religious community. (See page 9 for more on selecting an assessment psychologist.)

In a recent study on the use of psychological testing for admission into seminary formation (NCEA 2010), psychologists noted some differences for men entering religious communities as opposed to the diocesan priesthood. Specifically, they pointed out that psychologists need to be aware of three general areas when dealing with religious life. First, the psychologist must understand the culture or charisma of the religious community and be able to ask questions in the interview to assess the candidate's understanding of this charisma and determine if the applicant's personality style is suited for it. Second, the psychologist should inquire about the candidate's awareness of living a communal lifestyle and determine whether the candidate is suited for it—particularly when the communal setting involves the close, constant relationships of monastic life. Finally, the psychologist should assess the candidate's understanding of the religious vows of poverty, chastity and obedience. While this study focused only on male seminary applicants, these three main principles would likewise be appropriate in assessing prospective brothers, sisters or nuns.

Vocation directors would need to determine if the psychologist is experienced and qualified to conduct this type of assessment. While all psychologists are exposed to psychological testing through graduate school and internship, many do not regularly conduct testing. Making certain that the psychologist is experienced in assessments is of major importance. Licensure can be verified, either by requesting that the psychologist supply a copy of his or her current license (a common practice) or by contacting the licensing board for verification. Finally, a vocation director can meet with a psychologist to help him or her become familiar with the community.

## Using a proposal

Once a psychologist has a clear understanding of the nature and purpose of the assessment, he or she is in a position to submit a proposal to the vocation director outlining the process to be employed. Vocation directors need to feel

---

comfortable in requesting a proposal, since it will clearly state what is being done, the time frames and fees. The following elements are helpful to have:

**1. The purpose for the evaluation and the referral questions that need to be answered** This will allow the vocation director the opportunity to make certain that the psychologist understands what needs to be covered and addressed in his or her report.

**2. The specific methods and tests that will be used in the assessment battery** Questions as to why a particular test is being used can be answered at this time.

**3. The time frame for the actual assessment, the feedback session and the written report** (Also included may be how the applicant will contact the psychologist.) Vocation directors have time lines that need to be followed for when all of the information will be reviewed so that a decision may be made about whether the applicant can enter into formation. If a candidate will be entering a seminary, there may be deadlines connected to the academic calendar. All these needs should be made clear to the psychologist before the assessment to ensure that the psychologist has adequate time to meet deadlines.

**4. Who will be present for the feedback session and to whom is the report sent** While the community often pays for the assessment, it must be recognized that a psychological evaluation is an invasive procedure and that it would not be ethically justifiable to deny the applicant the opportunity to obtain feedback regarding the findings. The APA code of ethics (2002) requires such feedback to be part of the assessment process. Feedback needs to be given by the psychologist. Such sessions allow for a fuller and more complete explanation of the findings and in some instances introduces information that sheds a different light upon the assessment findings. The proposal should specify who will receive a copy of the report. Current practices are diverse in this regard between a copy going only to the community, a copy to the community and a summary to the applicant, and a copy to both the community and applicant.

**5. Fees and payment** The psychological assessment is a time intensive process that requires not only the face-to-face time of being with the applicant, but it also includes the cost of testing materials, time to interpret and write a report, and time for the feedback session. While the community may have a fixed budget for such testing, it is important to discuss any financial constraints with the psychologist. Some adjustments in the specific tests used can sometimes be made without significantly impacting the findings; other times it may result

in modifying the areas to be assessed, thereby limiting the utility of the assessment to a specific range of questions. This discussion needs to take place prior to the acceptance of the proposal. A proposal is an important and fiscally-responsible step. It provides an opportunity to clarify expectations and to make certain all deadlines are reached.

## The psychological report and findings.

After the assessment, the findings need to be conveyed in an understandable manner to both the applicant and to the community. As most communities are aware, the applicant must authorize release of this information to designated members of the community. The psychologist is bound to follow this release and is not permitted to release the data to anyone not specified.

In rare instances, the applicant will decide to retract his or her authorization, and when this occurs, the psychologist is unable to release any information.

Assuming the applicant has given permission to release the findings from the assessment, there are two methods often used. The first is a formal feedback session. At this time the psychologist is able to review the findings with the applicant and in some instances concurrent with the vocation director. This discussion permits a clear conveyance of the findings, along with an opportunity for the applicant to share more information about the interpretation and its application. In some instances the new information may require the psychologist to amend his or her findings. More often than not, the vocation director is able to observe the manner in which the applicant reacts to feedback. At the same time, the vocation director is able to further clarify any issues he or she does not fully understand.

The second method of sharing the findings is the actual written report. It is the responsibility of the psychologist to write in a jargon-free manner, and if certain psychological concepts need to be used, the psychologist should make certain that the recipient of the report understands the terms. Often, reports have subheadings to assist the reader in identifying key aspects. While each psychologist will most likely have his or her preferred formatting, it is not

Vocation directors need to feel comfortable in requesting a proposal, since it will clearly state what is being done, the time frames and fees.

---

uncommon to have identifying information about the client, the reason for the referral, the dates and tests administered, the background information, behavioral observations, test findings and a summary and recommendation section.

## Record retention

By law psychologists are obligated to maintain a record of the evaluation for a specified period of time, which may vary by each state. During this time the psychologist will keep all of the information in a secure setting. After the time limit<sup>1</sup>, he

Vocation directors will need to understand their community policy and procedure related to security and confidentiality of this report.

or she is permitted to destroy the file. Vocation directors would need to ask the assessment psychologist about this time limit at the time of the evaluation.

Vocation directors will need to understand their community policy and procedure related to security and confidentiality of this

report, too. Key questions to ask and know include: who reads the report; where is it kept; who has access to it; how long is it kept? Knowing the answers to these questions can greatly relieve the concerns of the applicant, who must give permission to send the report to the community.

The general principle with information sharing is that while the applicant is the gate keeper regarding information related to his or her psychological functioning, the applicant can give permission to share this information with others. However, such permission can only be given in an informed manner, which entails the applicant knowing what will happen with the report once the community receives it.

## Road map for formation

A well-conducted and well-written psychological assessment can be of significant importance to a vocation director, a selection committee, as well as to the applicant. However, as discussed above, a number of elements need to converge in order to maximize its usefulness. A good psychological assessment can provide a snapshot of the applicant's current level of psychological development and functioning, indicating the inner resources available for formational

development. A good assessment can identify potential risk factors or issues that would require the selection committee to seriously consider acceptance, deferral or rejection. It can confirm many of the observations of the selection committee and the beliefs that an individual holds of his or her strengths and weaknesses. It can jump start the formational experience by serving as a road map of issues to be addressed or concerns to be monitored.

For these positive effects to come about, a vocation director needs to do more than just contact a psychologist and arrange for an assessment. He or she plays an instrumental role in designing the assessment that will be most useful in selection and formation and in preparing the applicant to benefit from the experience. The greater the understanding of the psychological assessment process by the vocation director, the more effective the results can be for the community. ■

---

1. At this time some states regulate retention of records for seven years after the professional relationship ends (eg., California, North Carolina, Tennessee and Connecticut) but for minors it would not begin until the minor reaches the age of maturity. Other states have no laws, eg., Illinois. The American Psychological Association Record Keeping Guideline is seven years after the last date of service, and for minors, for three years after reaching the age of majority. It is best to check with the psychologist for the regulatory guidelines for the state in which the evaluation takes place. (APA Practice Organization, Pointers for Psychologists on Record Retention, APA website.)

## References

- American Psychological Association *Ethical Principles of Psychologists and Code of Conduct*. Washington, DC: APA, 2002.
- Meyer, G.J., et al. "Psychological testing and psychological assessment: A review of evidence and issues," *American Psychologist*, 56 (2001): 128–165.
- National Catholic Education Association. *Psychological Testing and the Screening of Candidates for Admission to Seminaries: A survey conducted by the NCEA Seminary Department and the Center for Applied Research in the Apostolate*. Unpublished study, anticipated publication 2010.

## *Selecting a psychologist to assess candidates*

### PROFESSIONAL QUALIFICATIONS

- ✓ Doctoral degree in psychology from an accredited college or university
- ✓ Program of study approved by the American Psychological Association (see <http://www.apa.org/ed/accreditation/doctoral.html>)
- ✓ Courses in psychological assessment with supervised experience leading to independent expertise
- ✓ If considering other mental health professionals: are they trained and experienced in conducting assessments?

### LICENSURE

- ✓ Licensed for practice as a psychologist
- ✓ If not licensed, is the professional under the supervision of a licensed psychologist? The supervisor is responsible for the work and will need to be evaluated for suitability by the community.

### LIABILITY INSURANCE

- ✓ It is acceptable practice to ask for a copy of the person's curriculum vitae (which shows education and training), license (verification), and liability insurance. (The the face sheet of the liability insurance is verification.)

### EXPERIENCE

- ✓ Routinely conducts psychological assessments as part of his/her practice
- ✓ Maintains competency with new assessment tools and techniques and uses the most current versions or editions of the tests
- ✓ Has conducted evaluations of applicants for seminary formation or religious life formation
- ✓ Has knowledge of Catholic anthropology, values priesthood and religious life
- ✓ It is acceptable practice to ask for references regarding seminary and religious life formation evaluations

### KNOWLEDGE OF CATHOLIC ANTHROPOLOGY AND RELIGIOUS LIFE

- ✓ Does the potential psychologist understand the charism and lifestyle of the community or institute?
- ✓ Does he/she understand the nature and permanency of commitment to religious life?
- ✓ Does he/she view religious life as a healthy lifestyle?
- ✓ Does he/she understand living a celibate lifestyle?
- ✓ Does he/she have any reservations regarding an individual living a life of celibate chastity?
- ✓ Does he/she understand formation and how it is not synonymous with educational preparation and job training?
- ✓ Is he/she willing to understand and discuss your specific needs regarding religious formation, including the type of candidate desired?
- ✓ Are you willing and able to work with the psychologist to help educate him/her to these important issues if they are lacking in this understanding?

### PRACTICAL CONCERNS

- ✓ Is the psychologist able to meet your time line for the assessment and report?
- ✓ How will the results be communicated?
- ✓ Will there be a feedback session with the applicant? With the vocation director? With both?
- ✓ How long will the report and test data be kept?
- ✓ What is included in the fees?
- ✓ It is acceptable practice to ask for a written proposal.

—by Ronald Karney

For a vocation minister to work effectively with a psychologist, it helps to know the testing instruments that are available. The right combination of tests can uncover personalities, pathologies, strengths and weaknesses.

# Tests for assessing applicants to religious communities

By ERIC HAAS

**I**N HIS PASTORAL EXHORTATION, *Pastores Dabo Vobis*, Pope John Paul II emphasized the need for the harmonious integration of four key elements of formation: human, spiritual, intellectual and pastoral (John Paul II, 1992). The Holy Father emphasized the *human dimension* as the foundation of all formation. While *Pastores Dabo Vobis* was written with priestly formation in mind, the document's insights contain truth for all church vocations: for both men and women, ordained and vowed. All of these vocations, then, merit an emphasis on human formation.

From a psychological perspective, human formation encompasses several areas: individual identity development, affective maturity, and the capacity for empathy and interpersonal sensitivity. Careful attention to each of these

---

*Eric D. Haas, Psy.D. is a licensed psychologist who has been serving the needs of clergy and religious for the past seven years. As a staff psychologist at St. John Vianney Center, he conducts psychological evaluations, individual and group psychotherapy, and consultations with dioceses and religious orders throughout the country. Dr. Haas has extensive training and experience in psychological and neuropsychological assessment. He is an adjunct assistant professor at the Institute for Graduate Clinical Psychology of Widener University and maintains a private practice in Wilmington, DE.*



characteristics, among others, is crucial in evaluating a potential candidate for religious life.

## The assessment process

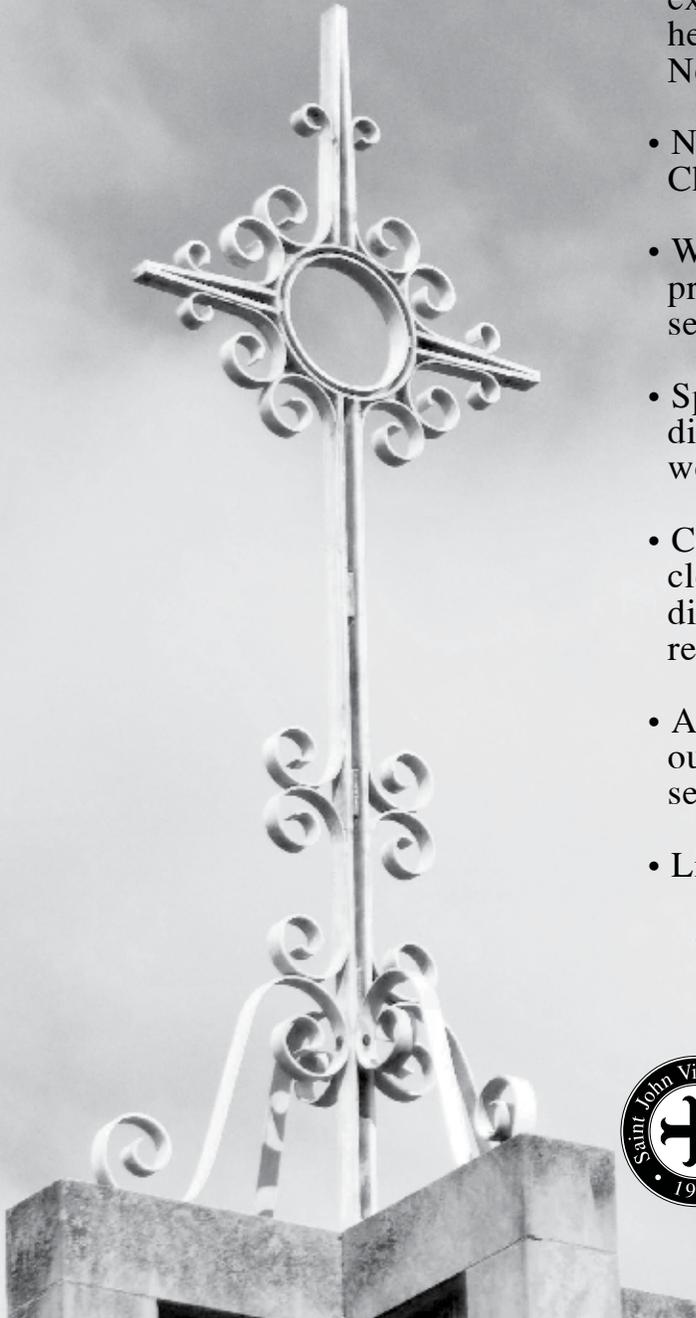
In the assessment of religious candidates, psychologists are typically asked to assist in determining personality characteristics that represent areas of personal strength and weakness for religious life, as well as whether any significant psychological factors exist that could be impediments to a healthy religious vocation. Depending upon individual circumstances, such factors could include major mental illness, intellectual limitations, personality disorders, substance abuse or other addictions, or a lack of psychosexual integration. While there are limits to the ability of psychological tests to definitively predict whether a candidate will ultimately succeed in religious and community life, psychological evaluations can be valuable to formation teams when used for screening out the above difficulties (Malony, 2000). Early identification of areas for needed growth can assist formation teams and the candidate in seeking appropriate intervention or assistance prior to final vows.

Competent psychological assessment incorporates a thorough clinical interview (often supplemented by written history questionnaires completed by the candidate), behavioral observations, and the administration of a comprehensive battery of psychological tests. (The way the psychologist's data builds on information gathered by the vocation director is treated in an article on page 35, "When



# Saint John Vianney Center

*healing, recovery, reconciliation*



- The longest tradition of providing excellence in physical and behavioral healthcare for religious and clergy in North America
- New and innovative programs for the Church of today and tomorrow
- Workshops, continuing formation programs and on-site consultation services
- Spiritually-focused treatment for diocesan clergy and religious men and women
- Comprehensive assessments for clergy, religious and the permanent diaconate from candidacy through retirement
- A full continuum of inpatient and outpatient behavioral healthcare services
- Licensed and accredited

***visit us online at: [sjvcenter.org](http://sjvcenter.org)***



**151 Woodbine Road  
Downingtown, PA 19335**

p. (888) 993-8885

p. (610) 269-2600

f. (610) 873-8028

---

the vocation minister assesses: seeking consistent belief, word, action,” by Sister Cindy Kaye, RSM.) The use of a multi-method approach to gathering data is recommended. This approach involves integrating history and interview data,

In testing situations such as the screening of religious candidates where the results have an impact on vocational decisions, the tendency for individuals to present themselves in a highly positive or socially desirable manner increases.

collateral information from vocation and formation teams, and the use of both the self-report and performance-based psychological tests. Given the tendency of individuals who are being evaluated for “employment-related” decisions to present themselves in an overly favorable manner in their self-report, the inclusion of projective personality tests (such as the Rorschach Inkblot Method) is advised to

provide data that is less susceptible to self-report bias.

In the hands of qualified professionals experienced in evaluating candidates for religious life, a number of psychological tests can be valuable tools in the assessment process. This article provides an overview of the typical elements of a comprehensive psychological evaluation of a religious candidate, the most commonly used tests that assess these areas, and the basic advantages and limitations of these particular instruments.

## Validity and multicultural factors

Since a psychological evaluation relies heavily on what individuals are willing to reveal about themselves, it is important to understand the style in which the person responds to the questions on self-report inventories and questionnaires. In testing situations such as in the screening of religious candidates where the results have an impact on vocational decisions, the tendency for individuals to present themselves in a highly positive or socially desirable manner increases. This type of defensiveness is often referred to as “impression management.” Fortunately, many psychological tests have specific scales that measure the degree to which one responds to the questions in an overly favorable or unfavorable manner—minimizing or exaggerating their

problems or faults. Scores on these scales are used to determine the validity and interpretive usefulness of the test results. Impression management is influenced by both conscious and less conscious factors, and measures are available to psychologists that help differentiate between an individual who is responding favorably primarily due to the circumstances of the evaluation versus a more potentially problematic form of self-deception that is associated with poor self-awareness and narcissism (Paulhus, 1998).

An even more basic validity issue in psychological testing involves the capacity of the candidate to comprehend the test questions. While the large majority of psychological tests are written at an eighth grade reading level or below, candidates with intellectual limitations or learning disabilities may not fully understand certain questions. Comprehension can be a factor, too, in the evaluation of candidates from other cultures, particularly those whose native language is not English. Since the number of foreign and Hispanic candidates is increasing (McGlone, et al., 2009), psychologists who evaluate candidates from other cultures need to be particularly sensitive to language and cultural factors during testing. Many of the commonly used psychological tests have at least Spanish language translations of the items. It is ethically responsible to ask the candidate which language he or she prefers. While multi-language translations of tests are helpful, they do not replace the need for culture-specific norms, which would allow an individual candidate’s responses to be compared to others of similar ethnicity. Unfortunately, such norms are rarely, if ever, available, so psychologists must use clinical judgment in adjusting their interpretation of test results as necessary in these situations. (The article “Assessment with cross-cultural candidates,” by Father Gerard J. McGlone, SJ and Fernando A. Ortiz, page 24, explores issues related to psychological testing and minority candidates.)

## Components of the evaluation

**Cognitive Assessment** Psychological evaluations of religious candidates often include an assessment of intellectual functioning. This is accomplished through the use of a standardized intelligence test. While a variety of such tests are available, survey results (NCEA, 2010) have indicated that the large majority of evaluators utilize either the Wechsler Adult Intelligence Scale (WAIS-IV) (Psychological Corporation, 2008) or its shorter version, the Wechsler Abbreviated Scale of Intelligence (WASI) (Wechsler, 1999).

---

These tests are comprised of different sub-tests and provide measures of intellectual ability in four domains: 1) verbal (i.e. Verbal Comprehension Index), 2) non-verbal (i.e. Perceptual Reasoning Index), 3) attention/concentration (i.e. Working Memory Index), and 4) information processing speed (i.e. Processing Speed Index), as well as a measure of overall intelligence (i.e. Full Scale IQ).

The WASI and the Kaufman Brief Intelligence Test (K-BIT2) (Kaufman & Kaufman, 2004) are shorter tests of intellectual functioning that require less administration time, although they provide less comprehensive information about cognitive functioning. Another, even briefer measure used is the Shipley - 2 (Shipley & Zachary, 1987); however, it is a screening test designed to provide a quick estimate of intelligence and should not be considered equivalent to more comprehensive measures of intellectual functioning such as the WAIS-III.

These tests can provide information about a candidate's cognitive strengths and weaknesses in skills such as vocabulary, fund of general knowledge, abstract reasoning, visual-spatial perception, social judgment, attention/concentration, and speed of information processing. Since tests of intelligence have been shown to be predictors of potential for academic success, results can help determine whether a candidate possesses a sufficient aptitude for meeting the academic requirements of formation. Intelligence test results can also guide decisions about the type of ministry duties that would best match the abilities of a particular candidate. Finally, intelligence tests can help detect cognitive problems or learning disabilities that may warrant more extensive neuropsychological or psycho-educational testing.

#### **Assessment of Emotional Functioning and Personality**

Psychological testing can provide a wealth of data to vocation and formation ministers about a candidate's current mental health and personality characteristics. This information can aid in decisions regarding the candidate and can help shape the formation process. The test results section in a good psychological evaluation report should provide information about signs and symptoms of psychopathology and major personality dysfunction, as well as a thorough description of a candidate's coping and personality style and how it is expressed in behavior. Through the use of clinical interviews and testing, a psychological evaluation can determine the presence of a mental health condition that could interfere with a candidate's formation and personal development. Examples of the most commonly diagnosed conditions are mood disorders (e.g. major depressive disorder, dysthymic disorder,

bipolar disorder, etc.) and anxiety disorders (e.g. generalized anxiety disorder, post-traumatic stress disorder, obsessive-compulsive disorder, etc.). Personality disorders, addictions and sexual disorders can have significant implications for both acceptance and formation, and they should be thoroughly assessed.

Personality is complex and multi-faceted. Psychological testing can provide information about many aspects of how individuals view themselves, view others around them, process their emotions, and cope with stress. Several elements of personality have particular relevance for candidates entering religious life.

Psychological testing can offer insight into a candidate's interpersonal skills, which should be an area of great importance to formation teams.

First, formation teams are strongly encouraged to be attuned to a candidate's sense of identity. Psychological testing can assess a candidate's capacity for introspection and self-awareness, or essentially, how well a candidate knows him or herself. The ability to acknowledge areas of vulnerability and weakness, as well as personal strengths, and one's openness and flexibility to growth and change should be considered. Test data can provide a window into a candidate's self esteem, self image and any distortions in that view of the self. A candidate's sense of how firmly rooted he or she feels in his or her identity has important implications in regard to relating to others in ministry and in communal life.

#### **Managing stress and emotions**

Psychological testing can also provide important information about how a candidate deals with his or her emotions and with various stresses. Specific test instruments and scales can determine individuals' ability to recognize their feelings when they experience them, the degree to which they use their feelings in their decision making and how effectively they manage and regulate their feelings. Certain psychological tests can offer insight into the degree to which strong emotions cloud a person's perception and thinking and provide a sense of one's overall reality testing. Test data about a candidate's ability to tolerate stress and frustration and the amount of resources available for coping can offer a sense of the resiliency of a candidate in the face of obstacles.

---

## Interpersonal skills

Finally, psychological testing can offer insight into a candidate's interpersonal skills, which should be an area of great importance to formation teams. Personality tests can measure an individual's level of comfort in social situations, capacity for empathy and intimacy in relationships, and a general sense of how the applicant perceives people and social interactions. Interpersonal boundaries and social skills, particularly the ability to read nonverbal cues, are

In addition to screening for psychopathology and personality disorders, testing can provide information about characteristics that are assets for someone entering religious life.

critical areas to assess. The tendency to distort or misinterpret interpersonal situations is a capacity that can be formally assessed and has implications for interpersonal relatedness and successful integration into a community of peers. Vocation ministers should be particularly concerned

about personality disorders, which are enduring patterns of inner experience and behavior in which these aspects of interpersonal functioning are disrupted (American Psychiatric Association, 1994).

## Types of personality tests

Two main types of psychological tests are used to assess psychopathology and personality: objective tests and projective tests. Objective tests are self-report inventories and symptom questionnaires in which the examinee answers various questions designed to elicit symptoms, characteristics, and behaviors that indicate a particular syndrome or personality style. Since these measures rely on self-reporting and many of the items are face valid (i.e. the subject can easily determine what the question is measuring), they are to some degree limited by the person's degree of self-awareness and willingness to self-disclose. Hence, the other type of psychological test, the projective test, can be useful. Projective tests are performance-based measures that are less structured and less face valid. These tests are based on the premise that an individual reveals his or her personality when responding to an ambiguous stimulus, such as inkblots or more open-

ended type questions. Since objective and projective tests gather information about an individual via different means, a combination of both methods is often used.

Survey results have indicated that among evaluators of religious candidates, the Minnesota Multiphasic Personality Inventory -2 (MMPI-2) (Butcher, et al., 1989) is by far the most commonly used objective test to assess psychopathology (NCEA, 2010). In addition to its well-established research base, the MMPI-2 offers evaluators of male religious candidates the advantage of a seminary norm group. Thus, if desired, a particular candidate's responses can be compared to those of a large group of applicants to the seminary to note how the results compare with a group of individuals who may more closely reflect the candidate's demographic type than the general population. With its numerous scales and subscales, the MMPI-2 provides information about signs of depression, mania, anxiety, bodily concerns, antisocial tendencies, paranoia, thought disturbances, social discomfort, and personality characteristics that correspond with certain diagnostic groups. The MMPI-2 is also respected in the field of psychology for its validity scales, which include measures of defensiveness, socially desirable responding, and response consistency and infrequency.

Other objective personality tests used in the evaluation of religious candidates are the Personality Assessment Inventory (PAI) (Morey, 1997) and the Millon Clinical Multiaxial Inventory (MCMI-III) (Millon, 1994). Both of these instruments have validity scales and provide information similar to the MMPI-2, with the addition of specific scales that measure personality styles and personality disorders. The MCMI-III has numerous scales designed to measure the various DSM-IV personality disorders, as well as other personality styles. While these instruments have fewer questions than the MMPI-2, thus take less time to administer, there is a recently reconfigured and briefer version of the MMPI-2 now available, the MMPI-2-RF, which may become increasingly popular in years to come. Brief symptom checklists, such as the Beck Depression Inventory (BDI-II) (Beck, et al., 1996), Beck Anxiety Inventory (BAI) (Beck and Steer, 1993) and the Symptom Checklist-90 (SCL-90-R) (Derogatis, 1983) are also commonly used to provide a quick overview of a candidate's current level of emotional distress.

As for projective measures, surveys have indicated that the Rorschach Inkblot Test is the most commonly used among psychologists who evaluate candidates for religious life (NCEA, 2010). While the Rorschach is not without its critics (Wood, et al., 2003) and like other psychological

---

tests, it has its limitations, its clinical utility is supported by a wealth of research over several decades. The development of a comprehensive scoring and interpretative system (Exner, 1991) for the test was a tremendous advancement, and the use of this system has become standard among Rorschach users in the field. The advantage of including the Rorschach in a test battery is that, through a means other than directly asking the person, it adds unique information that other tests do not provide. Rather than determining a specific diagnosis, the Rorschach is designed to provide information about an individual's cognitive and emotional processing style. It includes measures of cognitive processing and reality testing, mood and affect, self-perception, interpersonal functioning, stress tolerance, and impulse control.

Other projective techniques involve having the individual comprise stories in response to pictures (Thematic Apperception Test (Murray, 1943), draw pictures (House-Tree-Person and other projective drawing tests), and complete open-ended sentences that begin with certain prompts (Rotter Incomplete Sentences Blank) (Rotter, et al., 1977). While these tests can be useful additions to a test battery and yield information about a candidate, their lack of norms and their mostly unstructured and subjective interpretation makes them most valuable as adjunctive tools to confirm hypotheses derived from more formal measures.

In addition to screening for psychopathology and personality disorders, testing can provide information about characteristics that are assets for someone entering religious life. An evaluation that assesses a candidate's strengths and liabilities can identify building blocks for potential growth during formation. Tests such as the NEO-PI-R (Costa & McCrae, 1992), the 16 Personality Factor (16PF) (Cattell, 1989), and FIRO-B (Schutz, et al., 1978) measure characteristics such as introversion/extroversion, assertiveness, agreeableness, and needs for affiliation and inclusion. These tests can also offer data regarding a candidate's leadership capacity and style, as well as his or her needs for autonomy, independence and control. This information can be helpful in understanding how a particular candidate may adjust to religious life and in matching him or her to an appropriate ministry. Finally, these types of tests can help determine how a candidate's personality may mix with others in a particular community.

## Emotional intelligence tests

Emotional intelligence, which includes the ability to sense

and understand one's own feelings and the feelings of others, is a set of skills considered as important for success in life, if not more important, than cognitive intelligence (Goleman, 1995). These skills, which are the building blocks of empathy and intimacy development, are particularly important for those entering a communal life of service to others. Recent developments in psychological testing have resulted in instruments designed to measure emotional intelligence. One such test is the BarOn Emotional Quotient Inventory (EQ-i) (BarOn, 1997), which provides measures of inter and intrapersonal awareness, the capacity for adaptability/flexibility and the ability to manage daily stress. However, the self-report format of this instrument means its results may not be entirely accurate, as candidates are motivated to present themselves as sensitive to the feelings of others regardless of the reality.

Perhaps a potentially more useful tool in evaluating emotional intelligence is the Mayer-Salovey-Caruso Emotional Intelligence Test (MSCEIT) (Mayer, et al., 2002). The MSCEIT requires the respondent to actually demonstrate skills of emotional intelligence rather than rating his or her capacities in this area. Structured in a manner similar to other ability-based tests, the MCSEIT requires the examinee to judge the emotional tone of faces and pictures, discern how a person may feel in certain hypothetical scenarios, and decide how emotions can be used to solve interpersonal problems. The performance-based format of this instrument makes the results less susceptible to bias by candidates who are managing the way others perceive them. Since the concept of emotional intelligence is akin to "affective maturity," these newer tests represent a potentially useful addition to evaluations of religious candidates and seminarians.

Emotional intelligence, which includes the ability to sense and understand one's own feelings and the feelings of others, is a set of skills considered as important for success in life, if not more important, than cognitive intelligence.

## Tests for specific areas of concern

**Substance Abuse and Other Addictive Behaviors In**

addition to careful clinical interviewing, measures are available to assess drug and alcohol related difficulties. In a recent survey, 96 percent of psychologists indicated that they screened for drug and alcohol problems in their evaluations of religious candidates (NCEA, 2010). The Substance Abuse Subtle Screening Inventory (Miller, 2003) is a self-report instrument that assesses both the obvious and

A sometimes overlooked but important area to assess in religious candidates involves spending patterns and other money issues.

more subtle indicators of drug or alcohol problems and provides a probability estimate for the likelihood that the individual has a substance dependence problem. The Alcohol Use Inventory (Horn, et al., 1990) is another instrument with a more

structured way of sampling drinking patterns and problematic use.

A sometimes overlooked but important area to assess in religious candidates involves spending patterns and other money issues. Evaluators are encouraged to carefully question candidates about any compulsive buying habits, credit card use and significant debt. Inquiring about a candidate's family financial situation can be important, as some families may be relying heavily on income generated by the candidate. At times significant debt may indicate a compulsive gambling problem. Formation teams may want to consider credit checks on applicants as part of the initial screening process.

#### **Psychosexual Development and Sexual Disorders**

Taking a detailed sexual and relationship history is an essential component of a psychological assessment. Through the use of clinical interviewing and sexual history questionnaires, the evaluator attempts to understand a candidate's chronological psychosexual development, starting with influences and experiences during childhood, and progressing through the various life stages (Coleman, 1996). This information, along with a candidate's awareness of and comfort with his or her sexual orientation, views on chastity and celibacy, understanding of appropriate interpersonal and sexual boundaries, and capacity for intimacy in relationships are key areas to assess. Along with sexual history questionnaires, the Personal Sentence Completion Inventory (Miccio-Fonseca, 1997) is a projective measure that can be useful. Special attention should be given toward identifying any unusual or deviant sexual interests, childhood

sexual abuse, or extremes in sexual development, such as hypersexuality or asexuality.

With the age of the Internet, problematic use of computer pornography has become increasingly common. In fact, in a recent survey of psychologists who evaluate men seeking seminary admission, 80 percent reported that they assess for pornography-related issues (NCEA, 2010). Other potentially compulsive uses of the computer can involve Internet chat rooms, "cybersex," and—particularly among the younger generation—fantasy role-playing and other video games. An instrument that can be useful to clinicians in assessing these problems is the Internet Sex Screening Test (Delmonico, 1999).

Whatever tests a psychologist uses for evaluating a candidate, clearly, a psychological evaluation plays an important role in the admissions process. In addition to the information gleaned from clinical interviews, behavioral observations, record reviews, and reports from collateral sources, psychological testing provides an objective and standardized means of understanding the personality and mental health of an applicant to religious life. While the selection of specific tests varies among evaluators of religious candidates, as shown in this review, several measures are used almost universally. With a test battery that uses multiple methods, a competent evaluator who is familiar with religious life can screen for potential psychopathology, as well as determine areas of strength and weakness. The needs for growth can then direct a candidate's ongoing formation. When combined with information that the vocation minister gathers, a psychological assessment is a valuable tool in the application and entry process. ■

## **References**

- American Psychiatric Association. *Diagnostic and Statistical Manual of Mental Disorders* (4<sup>th</sup> ed.). Washington, D.C.: American Psychiatric Press, 1994.
- BarOn, R. *BarOn Emotional Quotient Inventory – EQ-i*. Lutz, FL: Psychological Assessment Resources, 1997.
- Beck, A.T.; R.T. Steer and G.K. Brown. *Beck Depression Inventory –II*. San Antonio, TX: The Psychological Corporation, 1996.
- Beck, A.T. and R.T. Steer. *Beck Anxiety Inventory*. San Antonio, TX: The Psychological Corporation, 1993.
- Butcher, J.N., et al. *MMPI-2: Minnesota Multiphasic Personality Inventory-2: Manual for administration and scoring*. Minneapolis: University of Minnesota Press, 1989.

- Cattell, H.B. *The 16PF: Personality in Depth*. Champaign, IL: Institute for Personality and Ability Testing, 1989.
- Coleman, G.D. "Taking a sexual history." *Human Development*, 17 (1996): 10-15.
- Costa, P.T. and R.R. McCrae. *NEO Personality Inventory-Revised*. Lutz, FL: Psychological Assessment Resources, Inc., 1992.
- Delmonico, D. *Internet Sex Screening Test*. Pittsburg, PA: Internet Behavior Consulting, 1999.
- Derogatis, L.R. *Symptom Checklist – 90 – Revised (SCL-90-R)*. Towson, MD: Clinical Psychometric Research, 1983.
- Exner, J.E. *The Rorschach: A comprehensive system*. New York: Wiley, 1991.
- Goleman, Daniel. *Emotional Intelligence*. New York: Bantam, 1995.
- Horn, J.L., K.W. Wanberg and F.M. Foster. *Alcohol Use Inventory*. Bloomington, MN: Pearson, 1990.
- John Paul II. *Pastores Dabo Vobis*. Post-Synodal Apostolic Exhortation, 1992.
- Kaufman, A.S. and N.L. Kaufman. *Kaufman Brief Intelligence Test – second edition (K-BIT2)*. San Antonio, TX: The Psychological Corporation, 2004.
- Malony, H.N. "The psychological evaluation of religious professionals." *Professional Psychology: Research and Practice*, 31 (2000): 521-525.
- Mayer, J.D.; P. Salovey and D.R. Caruso. *Mayer-Salovey-Caruso Emotional Intelligence Test (MSCEIT) User's Manual*. North Tonawanda, NY: Multi-Health Systems, Inc., 2002.
- McGlone, G.J., Ortiz, F.A., Viglione, D.J. "Cause for hope and concern: a commentary on the Vatican statement, 'Guidelines for the use of psychology in the admission and formation of candidates for the priesthood.'" *Human Development*, 30 (2009): 12-20.
- Miccio-Fonseca, L.C. *Personal Sentence Completion Inventory*. Brandon, VT: Safer Society Press, 1997.
- Miller, F.G., et al. *Substance Abuse Subtle Screening Inventory (SASSI-3) User's Guide*. Springville, IN: SASSI Institute, 2003.
- Millon, T. *Millon Clinical Multiaxial Inventory-III: Manual*. Minneapolis, MN: National Computer Systems, 1994.
- Morey, L.C. *Personality Assessment Inventory*. Lutz, FL: Psychological Assessment Resources, Inc., 1997.
- Murray, H.A. *Thematic Apperception Test*. Cambridge, MA: Harvard University Press, 1943.
- National Catholic Education Association. *Psychological Testing and the Screening of Candidates for Admission to Seminaries: A Survey conducted by the NCEA Seminary Department and the Center for Applied Research in the Apostolate*.



**LIGHTHOUSE**  
CATHOLIC MEDIA

**YOUNG ADULTS LOVE OUR SPEAKERS,  
AND SO WILL YOU**

**CDs starting at \$3**

Mother Teresa, Matthew Kelly, Dr. Scott Hahn,  
Fr. John Corapi S.O.L.T., Pope Benedict and many more

Ideal for young adult gatherings, faith enrichment,  
theology learning, vocation support

**[www.Cursillo-LighthouseMedia.org](http://www.Cursillo-LighthouseMedia.org)**  
David Zerhusen, (859) 363-1898



- Unpublished study, anticipated publication 2010.
- Paulhus, D. L. *Paulhus Deception Scales*. North Tonawanda, NY: Multi-Health Systems, Inc., 1998.
- Psychological Corporation. *Wechsler Abbreviated Scale of Intelligence*. San Antonio, TX: Psychological Corporation, 1999.
- Psychological Corporation. *Wechsler Adult Intelligence Scale IV*. San Antonio, TX: Psychological Corporation, 2008.
- Rotter, J.B., M.I. Lah and Rafferty, J.E. *Rotter Incomplete Sentences Blank - Second Edition*. San Antonio, TX: The Psychological Corporation. 1977.
- Schutz, W., A.L. Hammer, A.L. and E.R. Schnell. *Fundamental Interpersonal Relations Orientation – Behavior (FIRO-B)*. Mountain View, CA: CPP, Inc., 1978.
- Shipley, W.C. et. al. *Shipley - 2*. Los Angeles, CA: Western Psychological Services, 2009.
- Wood, J.M., et. al. *What's wrong with the Rorschach: Science confronts the controversial inkblot test*. San Francisco: John Wiley & Sons, Inc., 2003.

For the sake of everyone involved, vocation ministers should seek insight into an applicant's personality, maturity and mental health. A careful assessment will look at each of these areas in detail.

# Vocational discernment and the psychological report

BY SISTER MARY M. LINDSAY, SSJ

**F**OR DECADES MOST DIOCESES and religious congregations have required psychological assessment as part of their application process, while clearly maintaining that psychological health is one factor, among many, that enters into the discernment of a religious vocation. Throughout the years many experiences and concerns have shaped an ongoing conversation in response to the question of how a comprehensive psychological assessment informs and affects vocational discernment, religious formation and the overall adjustment and effectiveness of candidates once they are accepted.

## Vocation discernment and mental health

A vocation to priesthood or religious life emerges through a calling experienced within one's personal relationship with God. Such a calling depends upon the action

---

*Sister Mary M. Lindsay, SSJ, Ph.D. is a Sister of St. Joseph of Philadelphia who is a licensed staff psychologist at St. John Vianney Center. She has worked in the assessment and treatment of priests, sisters and brothers for the past 18 years. Dr. Lindsay is also an instructor and supervisor in the Department of Professional Psychology at Chestnut Hill College in Philadelphia and coordinator of field placements in the master's in clinical/counseling psychology program at Chestnut Hill College in Philadelphia*



of God's grace in one's life and spiritual development. Vocation directors strive to determine if a candidate has an authentic relationship with God, a healthy spirituality and a meaningful understanding of the vocation to which he or she aspires. Vocation directors also attempt to determine if an applicant has an adequate and positive understanding of the congregation or diocese to which he or she is seeking acceptance. Undoubtedly vocation directors also assess whether a candidate has the capacity to understand and respond with interior freedom to a divine calling. They must assess whether the candidate is capable of fulfilling the expectations and requirements of a religious celibate commitment. One can certainly note the underpinning of psychological health that is inherent in the process of vocational discernment, given the maturity and self-awareness that it requires.

In these shifting times, concern has been growing about how best to determine whether an applicant has adequate psychological health to live priesthood or religious life responsibly. This concern is sometimes fueled by the frustrating phenomenon of marked psychological problems that appear after testing has been completed. Applicants are evaluated, admitted to a formation program and in a relatively short period of time, they develop serious emotional or behavioral issues. This concern also extends to the increasing number of individuals who, within five years of profession or ordination, struggle in their lives and vocations and need psychological treatment. Simultaneously many who are examining and writing about vocation ministry are suggesting that there be increased collaboration between vocation

directors and the psychological assessors working with them to provide adequate evaluations.

More in-depth and more qualitative collaboration between psychologist assessors and vocation directors will lead to a more concrete understanding of how psychological assessment and vocational discernment can interface. In completing a helpful, comprehensive assessment, the behavior of the individual must be understood within the context of his or her personality. Very often it is the vocation director who has important history plus personal experience with the applicant. This is a direct result of many dioceses and religious congregations initiating changes in their admission procedures and vocation programs. Many dioceses and religious communities have instituted behavioral assessments, expect multiple meetings over time between candidates and vocation directors, and encourage applicants to meet with other members of a community or diocese. Some applicants live and minister with groups to gain further experience of the life and ministry. All of this information and personal contact, if utilized, enhances the discernment and assessment process significantly.

## The hazards of inadequate assessment

Particular cases seem to speak to the issue of collaboration and the perception that issues and circumstances may be missed in some assessment situations. One is the case of a priest (Father X) who had two psychiatric hospitalizations and public legal issues within five years of being ordained. He was also diagnosed with a psychiatric illness that most likely

existed prior to admission to the seminary. Another is a religious sister (Sister Y) who within two years of final profession was admitted for psychiatric

treatment and was diagnosed with two mental disorders and a substance abuse problem. A retrospective examination of both of these situations revealed that both individuals received psychological assessments prior to their admission to religious life.

Information gathered in a treatment context indicated that: Father X suffered several episodes of depression dating back to high school/college. He had a poor work history and was never able to secure a position in his field or maintain any position for a long period of time. He seemed socially isolated and dependent on family. He had a difficult relationship with his father, as he experienced him as controlling. He struggled to sustain satisfying and meaningful relationships over time. His life circumstances indicated an inability to deal with the normal stress of everyday life.

Sister Y, unknown to her community, had two inpatient psychiatric treatments prior to her acceptance into the congregation, the first in high school and the second was a readmission during college. She reported drinking alcohol excessively during college. In community she was very driven, intense and needy. She had communication and interpersonal difficulties in community life. Her mother had died when she was a pre-teen, and her father remarried. She had many unresolved issues with her mother, who was ill for many years

Many are suggesting that there be increased collaboration between vocation directors and the psychological assessors working with them to provide adequate evaluations.

---

and had treated her poorly. When asked why her community was not informed about her previous psychiatric treatment, she said that she was never asked about prior mental health treatment.

Without knowing more about how these two individuals were psychologically assessed, I can only conclude that

It is important to recognize that psychiatric disorders and all types of personality dysfunction exist on a severity continuum.

critical information was missed in terms of their histories, and that their assessments failed to fully capture an accurate level of personality functioning. These are the kinds of situations that can occur when necessary questions are not being asked and

clear “red flags” and other concerns are likely being missed.

A third example is a sister who during her formation program experienced depression, anxiety, dependency needs, inability to cope with stress and interpersonal problems in community. Efforts to deal with her symptoms in outpatient therapy were not sufficient, and she needed to be referred for inpatient treatment. In this case I did have the opportunity to review the pre-admission psychological assessment for this sister. The assessment was based upon the four measures that focused on vocational aptitude and interests and personality style and preferences. Although helpful information, none of the instruments used was the type needed to detect the kind of pathology she exhibited. Additional background history also indicated that this sister had experienced considerable social anxiety and isolation, an interrupted and erratic school history and enmeshed and dependent relationships with her parents.

These cases highlight why communication, collaboration and understanding are necessary among the vocation director, the psychologist, the diocese or congregation and the applicant involved in the assessment process. The community requesting a report must have a clear sense of the type of report needed and of the necessary historical and behavioral information that is relevant to the report findings. In an era when many applicants are older than in the past—typically mid-20s and beyond—there is often more critical history to be gathered. In addition to family history, education history and work history, the community needs to obtain histories covering the candidate’s medical, psychiatric, relationship, sexual, and substance abuse background. Important questions

about these areas of life cannot go unanswered. In addition, it is extremely important in the collaborative process to understand which aspects of personality a psychological assessment is measuring and to understand the corresponding symptoms and behaviors of specific personality traits.

## Detecting disorders and their severity

The type of comprehensive assessment needed to gain a clear picture of a person’s psychological health should include: extensive background information, current behavioral observations and impressions, and clear diagnostic information from testing that identifies whether an individual is experiencing symptoms of a psychiatric disorder or is exhibiting any type of personality dysfunction. It is essential that the psychological testing encompass critical domains of the personality and be able to assess the severity of any impairment. The information from all components should be synthesized, with each component reviewed and understood in light of the others.

It is important to recognize that psychiatric disorders (Axis I diagnoses) and all types of personality dysfunction (Axis II diagnoses) exist on a severity continuum. In terms of Axis I (mood disorders), the condition can be active, or the disorder can be recurrent or in remission. The related symptoms can be severe, moderate or mild. All of these distinctions are critically important. For example, an individual experiencing a major depressive disorder that is severe and recurrent, meaning that the symptoms are very debilitating and that there have been previous debilitating episodes, will most likely struggle with the demands of celibate commitment, active ministry and community. Whereas an individual who has suffered a depression that was situational, perhaps related to a loss or transition, with mild to moderate symptoms, and who remained functional while coping with symptoms, might be able to deal adequately with the demands of ministry and community.

Another area where accurate distinction would be critical is in identifying substance use disorders. It is essential to distinguish between substance abuse and substance dependence. It is also important to know specific details about the process of treatment and remission. The use of remission specifiers, such as: early full remission, early partial remission, sustained full remission or sustained partial remission are essential features for accurate diagnosis. For this reason, if there is any concern about substance abuse or substance dependence in a comprehensive assessment, I highly

---

recommend further assessment by an addictions specialist. Extreme clarity is needed for accurate understanding and treatment. I would strongly suggest that at least two years, preferably more, of sustained full remission is recommended for anyone attempting to transition to living a vowed commitment and engaging in active ministry.

## Understanding personality

Undoubtedly the single most important area of a comprehensive psychological assessment is an understanding of the personality organization of an individual and an assessment of his or her current level of personality functioning. This piece of information is the foundation upon which all information is considered. Any Axis I diagnosis has to be understood in terms of the personality structure that underlies the disorder. It is important to identify severe personality pathology that could impair perception, judgment, emotional responsiveness, impulse control and interpersonal functioning. Individuals with severe personality pathology tend to have recurrent relational difficulties, problems with work, periods of significant depression and anxiety, vulnerability to all types of addictive behavior and high risk for other self-destructive behaviors.

It is likely that all involved in the assessment process can communicate and collaborate more effectively when they have a greater understanding of the components of personality. The remainder of this article will highlight four key components of personality and examine aspects of personal history and behavior connected to these foundational components. The first of these is **reality testing**.

## Accurate perceptions judgements?

In order to make this reality determination, a psychologist must focus on various aspects of cognitive processes, namely acquisition of information, perception, and judgment. The question is how does a person acquire information? Does an individual have the ability to discriminate his or her subjective world from objective conditions surrounding them? Is the person able to appreciate conventional notions of what is realistic? Some people have an open and flexible manner of acquiring information while others might have a rigid and constricted manner that can cause distortion. Perceptive ability is the translation of information that is observed from the environment. Individuals who understand situations and other people in a conventional manner, as most people would,

are said to have good reality testing. Individuals who have difficulty in this area often have adjustment problems, as they experience the world in an idiosyncratic manner. Individuals with impaired reality testing have great difficulty in taking the perspective of another, or understanding others' motivations and behaviors. People with impaired reality testing often have difficulty anticipating the consequences of their behavior, and they lack an empathic capacity. These kinds of misperceptions lead to impaired judgment and an inability to form accurate and logical conclusions and decisions.

In vocation work how you experience an individual becomes very important. If you sense that people have chronic relational difficulty, are rigid in their ability to hear or entertain new information or possibilities, are never able to see the part that they play in any conflict or confusion, seriously lack the capacity to empathize with others, and consistently come at all discussions and experiences from a very different perspective, this is helpful diagnostic information that should be shared as part of the collaborative effort.

Superimposing additional [religious] identity on an individual who does not have a solid personal identity can be quite problematic.

## How developed is personal identity?

A second critical component of personality is **identity**. An individual with a well formed identity is able to view him or herself and others in complex, stable and accurate ways. The first component of identity concerns an individual's self-image, self-esteem and sexual identity. Second, the nature of an individual's personal development needs to be ascertained because it will help to explain his or her personal conflicts. The stages of psychosexual development have corresponding developmental themes. An individual's early developmental conflicts and basic developmental difficulties must be identified, as stage specific conflicts contribute directly to the formation of self-esteem and identity concerns. In addition, identity includes the nature of parental identifications and to the manner in which these have been internalized and accepted. When the internalizations are not acceptable, then psychosexual problems will exist.

Ambivalence in psychosexual identification correlates

# INSTITUTE *of* RELIGIOUS FORMATION



## Empowering Formation Leaders for a Global Church

Those in charge of formation must be very familiar with the path of seeking God to accompany others on this journey...

But above all they will disclose the beauty of following Christ and the value of the charisma by which this is accomplished.

— Vita Consecrata, 1996

The Institute of Religious Formation (IRF) at Catholic Theological Union provides a unique, holistic formation program for diocesan and religious formation directors. Participants live, worship and study together in community for nine months, providing an opportunity for lasting integration.

When participants leave IRF, they have the skills and tools needed to be competent and effective in their ministry of formation and in other ways they are called to serve.

With 35 years of experience and more than 1,700 graduates, IRF is a trusted source in formation preparation.



Catholic  
Theological  
Union

The Largest Roman Catholic Graduate School of Theology and Ministry in the U.S.

Contact: Sr. Maria Hughes, A.S.C., Director  
773.371.5481 or mhughes@ctu.edu

[www.ctu.edu](http://www.ctu.edu)

5401 S Cornell Avenue  
Chicago, Illinois 60615

to immature and diffuse psychosexual development. Some derivatives of a relatively immature psychosexual identity are: the extent and degree of dependency, sexual acting-out (whether heterosexual or homosexual), the nature and management of frustration tolerance, overall ability to sublimate impulses for constructive purposes, and the ways in which ambition, achievement, mastery and gratifications are worked out.

Identity formation is one of the critical assessment areas for vocational discernment. Becoming a priest or a religious sister or brother involves new roles and in some sense “additional identity.” What I have often encountered is that superimposing additional identity on an individual who does not have a solid personal identity can be quite problematic. It is analogous to expecting something to stand that is not on a firm foundation.

Very often vocation directors have significant information in these areas. It is important to note experiences—as observed in candidates—of personal immaturity, excessive dependency or inability to function. Often there are valuable

observations about a person’s sense of self, whether the person presents as consistent and stable, or is perceived as different in various situations, saying what he or she thinks you want to hear. Vocation directors also have valuable information that informs this area. Family history and information about family relationships, specifically parental relationships, is of utmost importance. Also information about an individual’s educational history, work history, personal accomplishments, failures, unfulfilled dreams and incomplete projects sometimes can speak volumes about their sense of achievement and mastery. Information about sexual history and sexual behavior is important, whether it is in the form of specific questions, or to clarify things that have been made known that are a cause for concern.

### Is ego strength adequate?

A third, important component of personality is **ego strength**. Ego strength is a measure of an individual’s emotional resilience and capacity to adapt to and cope effectively

---

with the demands and stresses of life. It is an important determinant to highlight in any assessment. Clearly an individual's identity formation is an integral part of his or her ego development. Again, ego strength exists on a continuum. If ego strength is described as brittle or fragile one's adaptive capacity is seriously compromised, creating an experience of emotional vulnerability and poor adaptability. When an individual has adequate ego strength, he or she is able to respond to stress resourcefully, manage anxiety, regulate impulses, manage relationships effectively, achieve desired goals and recover from painful events without undue difficulty. The person copes in ways that are adaptive. An important question to answer in an evaluation is if an individual's ego is brittle, rigid, flexible or fragile.

For vocation directors there are many ways to collaborate around issues of ego strength. Basically any feedback about how an individual copes with life demands and expectations is very important. From your perception and experience, how well do individuals seem to manage their impulses and their anxiety? How do they seem to meet their goals, manage distress and maintain balance in their lives? How are interpersonal relationships managed? Can they be sustained or deepened? Do you experience an individual as creative, resourceful and resilient?

## Mature emotional regulation is key

A fourth component of personality that is most important to understand is **emotional regulation**. It is important to determine if individuals are able to experience a full range of emotions in themselves and others, and if they are able to regulate impulses and affect in ways that foster adaptation and satisfaction, with flexibility in using defenses and coping strategies. What determines a healthy personality is a mature balance of impulse and control. Maturity demands that we maintain "healthy control" of our impulses and emotions. In individuals with adaptive personality functioning, a natural and relatively comfortable fluctuation occurs in the interplay between impulse and control factors. If someone is immature and impulse-oriented, the potential for acting-out their feelings, frustrations and conflicts behaviorally and interpersonally and harming others is likely high, specifically in regard to anger and sexuality. An individual can also be emotionally immature and control dominated, in which case his or her behavior is guided by caution and a fierce desire to maintain control over either impulse or action. This leads to an extremely inhibited and restricted approach to managing

affect, which can often be very debilitating and ineffective.

From the point of view of vocation directors it is important to notice how individuals manage their emotions and deal with impulses. It is important to determine if individuals can express their feelings in ways that are productive, for themselves and others. Or, for example, do they express emotions in masked ways? For example, instead of expressing anger directly, is it expressed in sarcasm, quarrelsomeness or passive-aggressive behavior? Is an individual able to express positive emotions but finds it impossible to express any type of negative feelings? When attempting to express anger does an individual become hostile or aggressive? Is there any past information suggesting that an individual ever acted-out either aggressively or sexually?

In summary, informed mutual collaboration between vocation directors and the psychologists who are assessing applicants should foster the gathering and sharing of pertinent historical and behavioral information. It should also help assessors to formulate precise and informative assessment batteries. Having in-depth and accurate background shapes clear referral questions and concerns and allows for the selection of the best measures to yield more accurate results.

I also believe that there must be a clear understanding of the task at hand. In terms of a revered spiritual axiom, there must be a clear appreciation of the particular human nature upon which the grace of religious life can build—"grace builds on nature." To do anything less than attempt to capture a real, accurate assessment of an individual's psychological health and capacity for celibate commitment is to do him or her a grave disservice. To encourage people to seek a life and a future for which they may not be a good match and for which they lack the necessary disposition and resources, is to place them and the community in a precarious position. ■

## References

- Antony, Martin M. and David H. Barlow. *Handbook of Assessment and Treatment Planning for Psychological Disorders*. New York: The Guilford Press, 2002.
- Kellerman, Henry and Anthony Burry. *Handbook of Psychodiagnostic Testing: An Analysis of Personality in the Psychological Report*. Boston: Allyn and Bacon, 1991.
- PDM Task Force. *Psychodynamic Diagnostic Manual*. Silver Spring, MD: Alliance of Psychoanalytic Organizations, 2006.

Religious communities are welcoming people from a variety of cultures and races. Yet it can be a challenge to conduct an accurate and culturally sensitive assessment. Two professionals offer their insights.

# Assessment with cross-cultural candidates

BY FATHER GERARD J. MCGLONE, SJ AND FERNANDO A. ORTIZ

*Culture is so natural to man that human nature can only be revealed through culture.*

—Pontifical Council on Culture

**T**HE U.S. CHURCH TODAY encompasses a great many immigrants and ethnic minorities. Likewise, more and more priests and religious are either foreign-born or come from families that are ethnic or cultural minorities. In keeping with this trend, an increasing number of minority candidates for priesthood or religious life are also being psychologically evaluated (Batsis, 1993; Niebuhr, 2000). The goal of these evaluations is to determine whether candidates have the skills

and mental health to live religious life fully. However, since testing is culturally bound, vocation ministers are well advised to tread carefully when they assess a person who is ethnically or culturally distinct.<sup>1</sup>

This article focuses on male candidates—our area of expertise—but much of the current discussion about assessing minority candidates may also apply in some measure to women. A candidate’s assessment usually involves the administration of widely used psychological measures that have been constructed, normed, standardized and published in the United States (Hennessy, 1994). More specifically, these measurement instruments include intelligence, personality, vocational, behavioral, spiritual and symptom inventories, which are mostly used with English-speaking populations by examiners trained in doctoral level institutions accredited by the American Psychological Association. However, as this article points out, assessment practices with ethnic minority or international populations generally requires a significantly high level of “cultural competence and sensitivity” (Dana 1995a, b, 1996, 1998). Several researchers have identified serious shortcomings in the multicultural utilization of the most widely used assessment instruments (Allen & Dana, 2004; Dana, 1995b). This includes biases in measurement, inaccurate and invalid interpretations and method and test item biases.

The consideration of cultural factors in psychological assessment has become an imperative (Jones & Thorne, 1987; Miller-Jones, 1989; Westermeyer, 1987). In order to minimize or eliminate some of the problems associated with the

*Father Gerard J. McGlone, SJ, Ph.D. is executive director of the Saint John Vianney Center in Downingtown, PA. He specializes in bilingual treatment and assessment, the dynamics of trauma, prevention of sexual abuse, and psychological assessment across the life-span. He has worked at Georgetown University School of Medicine and The Johns Hopkins University School of Medicine.*

*Fernando A. Ortiz, Ph.D., is assistant director of the Counseling and Career Assessment Center at Gonzaga University in Spokane, WA, specializing in personality assessment, multicultural competencies*



assessment process of international or minority candidates, we offer the following reflections and practical applications.

## A Catholic perspective on assessment

The psychological assessment of candidates to the priesthood, religious life and ministry should “be accurate, thorough and, most importantly, ethically informed, culturally sensitive and theologically sound.” These are among some of the *sine qua non* requirements outlined in the recent Vatican document addressing priestly formation. In the document “Guidelines For the Use of Psychology In the Admission and Formation of Candidates for the Priesthood,” Pope Benedict XVI highlighted the methodological accuracy of psychological assessment that is obtained through multiple sources of data in an ethically responsible context of free consent, that is “to arrive at a *correct evaluation* [emphasis added] of the candidate’s personality, the expert can have recourse to both interviews and tests. These must always be carried out with the previous, explicit, *informed and free consent* [emphasis added] of the candidate.” Our first question is a quite basic one with nonetheless serious implications: If the language employed in the assessments (interviews or tests) is significantly different for the non-English-speaking candidate or minister, how can one be sure that his or her consent is indeed both free and informed? Language abilities vary widely. Self-report of these abilities may be biased. One simple question to ask at the outset is this: what language does the candidate use in prayer? This language will be the language

of the emotions, the passions and the heart. Therefore, it is this language that might well be the best language to use in testing or in measuring a dimension like “affective maturity” and its development.

Moreover, experts conducting these psychological assessments “must be *inspired* by an anthropology that openly shares the Christian vision about the human person.” A second more pointed question not often asked of the psychologist is quite central to cultural competency and sensitivity, namely how familiar and *inspired* are you (as an assessor) with the current environment, lifestyle and demands associated with a healthy celibate lifestyle that will be required of this candidate? A holistic and multidimensional approach is of paramount importance given that “...today’s candidates represent a considerable diversity—not only of differing personal gifts and levels of maturity but also significant cultural differences—that must be taken into account. All those involved in the evaluation of applicants for priestly formation must appreciate cultural, generational, educational and familial differences and be able to recognize which are gifts, which are liabilities and which are simply indications of a need for fuller growth” (*Program of Priestly Formation*, PPF, 38). Thus, the recommendation is that all those involved in the assessment and evaluation of candidates should make sure that “due care should be observed in correctly

How familiar is the assessing psychologist with the demands that will be placed upon a culturally different candidate by this new and equally “different” environment?

interpreting the results of psychological testing in light of the cultural background of applicants” (PPF, 52). We strongly recommend going one step further, to ask: How familiar is the assessing psychologist with the demands that will be placed upon a culturally different candidate by this new and equally “different” environment or sub-culture and the inherent belief system that is operational within the religious community? This inquiry is often overlooked because vocation ministers and formators fall back upon rationales such as “we have always used this person” or “they are Catholic—they know

Religious communities should make every effort to work with a psychologist who possesses what we call “cultural assessment competency.”

us!” Yet research by the Center for Applied Research in the Apostolate (2009) indicates that lack of in-depth familiarity with the community or diocese is a problem. There are major disconnects and misunderstandings between the assessing

psychologist and the rector, vocation director, religious community and/or seminary personnel.

## Framework for culturally sensitive assessments

Consistent with the Catholic perspective outlined above, we propose that in cross-cultural situations, religious communities should make every effort to work with a psychologist who possesses what we call “cultural assessment competency.” This competency entails: a) self-awareness, b) knowledge, c) skills and d) a genuinely Catholic anthropology. Ideally, psychologists evaluating candidates would be competent in all of these four dimensions. Unfortunately some psychologists are only “aware” of cultural factors, but may not know what to do with this cultural awareness in the absence of knowledge, skill and the understanding of distinctively Catholic perspectives. Other psychologists may have obtained factual knowledge and information on culturally sensitive assessment through graduate training, readings and information, but they may lack competence in the other dimensions. The question, then, for religious orders and vocation directors is: How culturally competent is the psychologist whom we are using (or plan

to use) for psychological assessments with the Catholic environment, situation, and lifestyle into which this culturally diverse candidate will be formed and challenged?

Given that psychological assessment always occurs within a cultural context (Ridley et al., 1998) and that unfortunately cultural factors are often ignored or overlooked in psychological evaluations (Dana, 1995a), we believe that evaluators, vocation ministers and formators should be cognizant of the following dimensions during the entire assessment process. We encourage them to take the following actions and attitudes.

**1. Self-Awareness** Be aware and sensitive of your own cultural background and world view when relating to culturally different candidates. Monitor how your own experiences, attitudes, values and biases may influence the assessment process. Be comfortable with differences that exist between yourself and candidates in terms of cultural values (including spirituality issues).

Explore objectively the issues of acculturation, language and racial/ethnic identity development during the assessment process. Explore the issues of celibacy, chastity and abstinence from a distinctively Catholic framework and not simply your own personal view or the dominant culture’s perspective.

Monitor carefully the relational history of the candidate for clear evidence that indicates a realistic possibility that the foreign-born or minority candidate is capable of intimacy that is relationally-oriented, balanced, open to growth and freely celibate.

Communicate clearly to the assessing psychologist the expected psychological, situational and spiritual capacities that generally enable a candidate to live a fruitful and healthy life within a rectory or religious community.

Pick assessors who are culturally competent in Roman Catholic identity and who have experience with and knowledge of the fundamental elements of religious or priestly formation that every seminarian or candidate to religious life will inevitably experience as a new lifestyle— a new way of living.

As with any candidate, one must carefully acknowledge, screen and assess the full range of socio-economic realities that might constitute contributing factors toward the overall motives with which the candidate might be coming to this vocational discernment process.

**2. Knowledge** Recognize the limits of your knowledge of cultural concepts and worldviews; this includes the ability to know what spiritual and psychological resources are necessary for living as a healthy celibate today.

---

Acquire specific knowledge of the variety of personal worldviews in your own culture and in other cultures; this includes unique Catholic sub-cultures.

Establish consultative relationships with cultural experts (e.g., interpreters and translators, cultural diversity consultants and culturally diverse members of your own presbyterate or religious institute).

**3. Skills** Learn about culture-specific or indigenous psychological experiences, and use them to understand the candidate's frame of reference. Incorporate into the assessment practice and evaluation of candidates the use of culturally-meaningful expressions to establish positive rapport and trust.

Consult with and get feedback from other colleagues who have solid experience with the practice of ethically responsible and culturally sensitive assessment practice.

**4. Catholic anthropology** Take a holistic approach to the human person during assessment and closely consider a Catholic anthropology of the human person (body, mind, spirit) across multiple dimensions of existence (natural, spiritual, supernatural, etc.).

Appreciate the overlap and interrelation between internal subjective experience that reflects culture (thoughts, emotions, beliefs, perceptions, values, attitudes, orientations, epistemologies, consciousness levels, expectations and personhood) and external correlates of culture (roles and cultural practices).

To illustrate the interplay of these four dimensions and the complexity of psychological assessment employing all four with culturally diverse candidates, this vignette offers some practical suggestions we have gleaned from the scientific literature.

## The example of José

José, a 19-year-old Mexican male, arrived in the United States two years ago. Since his arrival, he has been very active in his predominantly Spanish-speaking home parish in Los Angeles, California. He graduated from high school in his native country and recently has completed an intensive English as a Second Language program to acquire more fluency in English. He has a strong interest in discerning his vocation to the priesthood and has already started the screening process with the vocation director. During the interview process, he stated that he misses his hometown in Mexico. He maintains a strong sense of loyalty to his family and participates in Mexican cultural practices. As part of the customary screening process, the vocation director refers José to a licensed

psychologist for a fully integrated psychological evaluation. José reported that he has never seen a therapist before or previously talked to a psychologist.

The dimensions of acculturation, immigration, education and vocation are some critical assessment domains that need to be addressed during the assessment process, especially if José will be expected to minister to both ethnically similar and dissimilar parish populations, each of which may provoke the stress of acculturation and thus require multicultural skills and competencies.

### Acculturation

What is José's cultural self-definition and level of comfort interacting and working with people from ethnically different groups and navigating the predominant American culture? What is José's level of acculturation (i.e., assimilation, separation, marginalization and integration) and what degree of acculturative stress associated is with these levels? (Acculturative stress is the tension experienced when a person must function in a new and foreign culture; "culture shock" is the colloquial term for it.) What is the extent and relative strength of his social support network? Has he personally experienced or witnessed any racism, discrimination or oppression? What impact have these experiences had on his psychological coping capabilities?

José will be expected to minister to both ethnically similar and dissimilar parish populations, each of which may provoke the stress of acculturation and thus require multicultural skills.

**Immigration** What were the circumstances and experiences surrounding his departure from Mexico? Did he incur any losses as a result of leaving? How well have he and his family adjusted and adapted to life in the United States? Is he experiencing any other distress stemming from his immigrant status (e.g., feeling pressured to learn English, experiencing difficulties interacting with others due to limited English skills, feeling unaccepted due to his status as a Mexican immigrant)?

**Education** What was José's highest level of schooling in his native country and language? How strong are the cognitive and academic foundations necessary to facilitate his acquisition of English and successful academic seminary performance? Is there any history of academic underachievement or learning disabilities? What are his

---

parents' respective levels of education and how have they influenced his own academic aspirations?

**Vocation** What are some of the most salient cultural influences on his vocation (e.g., positive cultural role models; family, peer and cultural involvement and support)? What specific norms, rules, conventions, values and beliefs (or stereotypes) typical of Mexican culture have shaped José's personal idea of the priesthood? To what extent have these internalized, culturally-derived ideas of the priesthood affected his motivation and vocational expectations?

Problems with commonly used instruments include: bias in item content, differences in test-taking skills, lack of appropriate norms for various cultures, misinterpretation of test data and problems in test translation.

## Stages of the assessment

Be aware of José's familiarity with psychological resources and his cultural attitudes toward psychology. In some Latino cultures, for example, the profession of psychology may be negatively stigmatized and considered culturally undesirable.

Facilitate José's participation in the assessment process by informing him of reasons for evaluation and expectations. Explaining the purpose, goals and process of assessment to culturally different candidates may ease misunderstandings.

Recognize that culturally-related defensive reactions to assessment may be normative for some minority or foreign-born candidates.

Identify a qualified evaluator (preferably a bilingual, licensed Ph.D.) who has received explicit training and supervised evaluation experience working with Hispanic/Latino Catholic examinees. Be careful to seek out someone who has this multidimensional, multifaceted "cultural competence" in each of these areas.

**Assessment** Establish culturally-sensitive rapport with José (e.g., prior to psychological evaluation, assess his level of bilingual skills and culturally-related test-taking attitudes).

Evaluate his level of acculturation and racial/ethnic identity development. Use standardized instruments in culturally appropriate ways. Typically cited problems with common instruments include: bias in item content,

differences in test-taking skills, lack of appropriate norms for various cultures, misinterpretation of test data and problems in test translation. An evaluator may need to consult specialized literature and manuals on more specific guidelines (e.g., see Fernandez et al. 2007, for professionally responsible test selection for Spanish-speaking clients).

Use culture-specific instruments that have been constructed, normed and validated with Mexican populations. In this case, the use of the Acculturation Rating Scale for Mexican Americans (ARSMA, Cuéllar et al., 1995) or the Hispanic Stress Inventory (Cervantes et al., 1991) would aptly augment the assessment process. These two instruments were specifically developed with Mexican and Mexican-American populations in mind.

When necessary, use interpreters who, at a minimum, a) can relate to José's racial and ethnic background, b) are trained in the use of Spanish for psychological assessment and c) will respect and honor his vocational and spiritual desires.

**Post-Assessment** The vocation director and evaluator should have a collaborative professional relationship. In this case, the vocation director should inquire about which culturally-appropriate protocol was used to evaluate José and what specific steps were taken to address cultural factors in his assessment.

Discuss with José the major findings of his psychological assessment and provide him with feedback based on evaluation results in a culturally sensitive manner.

We would like to offer some caveats regarding the suggestions made in this article. First, it must always be remembered that psychological assessment is a very individualized task and there is a reasonable range of diversity in how psychologists conduct evaluations. What we have provided here are general suggestions that may inform both evaluators and formators as they consider the best pathways to designing and employing culturally sensitive assessment of candidates to the priesthood and religious life. Second, not every suggestion presented here can be used with every culturally-diverse candidate, given the significant diversity of candidates to the priesthood apart from cultural considerations. We have carefully reviewed the existing psychological literature and extracted what we consider the most helpful suggestions. Ultimately, it is the expertise of the evaluator and his/her clinical judgments following best practices and ethical guidelines on assessment that will yield ethically informed, culturally sensitive and theologically sound psychological evaluations. The final word will be very simple. It is found in its simplicity and in its complexity

---

within the collaborative dialogue, working relationship and open communication that must exist between vocation directors, formators and evaluators. This positive dialogue will determine the best outcome for religious communities and the church as a whole. ■

---

1. For the purposes of this article, the terms “multicultural,” “cross-cultural” and “cultural” are defined as broadly as possible to include personal dimensions and individual differences related to race, ethnicity, spirituality, gender, socioeconomic status, disability status, age, nationality, etc., which play a critical role in the human formation of candidates. The examples in this article refer primarily to ethnicity, given its salience in most ethnically diverse U.S. candidates to the priesthood and religious life.

## Suggested books and Web sites

### ***Handbook of Multicultural Assessment:***

#### ***Clinical, Psychological, and Educational Applications***

3rd Edition, by L.A. Suzuki, and J.G. Ponterotto. New York: Wiley, 2007. This book has readable chapters for non-psychologists on some of the major assessment instruments used to evaluate candidates to the priesthood. It addresses specific cultural dimensions (ethnicity, language, family values) and how they can be incorporated and interpreted in psychological assessment.

### ***Assessment and Culture:***

#### ***Psychological Tests with Minority Populations***

by Sharon-Ann Gopaul-McNicol, and Eleanor Armour-Thomas San Diego, CA: Academic Press, 2001. After 15 years of professional experience in culturally sensitive assessment with individuals from various ethnic, cultural and linguistic backgrounds, the authors have written this book with practical suggestions for the assessment of cognitive, personality, vocational, linguistic, visual-motor and educational areas. Vocation ministers and psychologists will find this resource very helpful in the evaluation of culturally diverse candidates.

### **<http://www.apa.org/science/testing.html>**

This is the official site of the American Psychological Association Science Directorate for Testing and Assessment. It provides information on psychological testing and assessment, acquiring psychological tests and ethical guidelines and

standards. It contains a section of frequently asked questions regarding psychological evaluations.

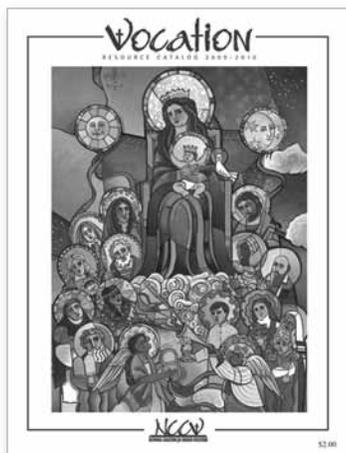
### **<http://www.ac.wvu.edu/~culture/readings.htm>**

This site offers online readings in psychology and culture from the Center for Cross-Cultural Research at Western Washington University. It is an outstanding compilation of readings from multicultural and cross-cultural experts dealing with topics of culture and psychology.

## References

- Allen, J., and R.H. Dana, “Methodological issues in cross-cultural and multicultural Rorschach research.” *Journal of Personality Assessment*, 82 (2004): 189-206.
- Batsis, T. “Roman Catholic vocation directors’ attitudes regarding psychological assessment of seminary and religious order applicants.” *Consulting Psychology Journal*, Summer (1993): 25-30.
- Center for Applied Research in the Apostolate (CARA). *Psychological testing and screening of candidates for priesthood*. A Project of the National Catholic Education Association Seminary Department and CARA. Washington, DC: Georgetown University, 2010.
- Cervantes, R.C., A.M. Padilla, and N. Salgado de Snyder. “The Hispanic Stress Inventory: A culturally relevant approach to psychosocial assessment.” *Psychological Assessment*, 3.3 (1991): 438-447.
- Cuéllar, I., B. Arnold, and R. Maldonado. “Acculturation Rating Scale for Mexican Americans-II: A revision of the original ARSMA scale.” *Hispanic Journal of Behavioral Sciences*, 17.3 (1995): 275-304.
- Dana, R.H. “Culturally competent assessment practice in the United States.” *Journal of Personality Assessment*, 66.L (1996): 472-487.
- Dana, R.H. “Culturally competent MMPI assessment of Hispanic populations.” *Hispanic Journal of Behavioral Sciences*, 17 (1995b): 305-319.
- Dana, R.H. “Impact of the use of standard psychological assessment on the diagnosis and treatment of ethnic minorities.” *Psychological Interventions and Cultural Diversity*. Eds. J.F. Aponte, R.Y. Rivers, and J. Wohl Boston: Allyn and Bacon, 1999, 57-73.
- Dana, R.H. *Understanding Cultural Identity in Intervention and Assessment*. Thousand Oaks, CA: Sage, 1998.
- Fernandez, K., M.T Boccaccini, and R.M. Noland. “Professionally responsible test selection for Spanish-

## ONE-STOP SHOPPING FOR CATHOLIC CHURCH VOCATION RESOURCES



**NEW!** 2009-2010  
Vocation Catalog

**290+ Resources**  
to help create a  
Culture of Vocations.

**40+** New Items!

**Free Catalog**  
with your first order.

**Order Online**  
[www.nccv-vocations.org](http://www.nccv-vocations.org)



NATIONAL COALITION for CHURCH VOCATIONS  
5401 S. Cornell Avenue  
Chicago, Illinois 60615  
773.955.5453 / [www.nccv-vocations.org](http://www.nccv-vocations.org)

*Pray for Vocations!*

speaking clients: A four-step approach for identifying and selecting translated tests." *Professional Psychology: Research and Practice*, 38 (2007): 363-374.

"Guidelines for the Use of Psychology in the Admission and Formation of Candidates for the Priesthood." [http://www.vatican.va/roman\\_curia/congregations/ccatheduc/index.htm](http://www.vatican.va/roman_curia/congregations/ccatheduc/index.htm). Accessed on July 13, 2009.

Hennesy, J. "Psychological testing in vocational selection." *Psychology, Counseling and the Seminarian*. Ed. Robert Wister. Washington, D.C.: National Catholic Educational Association, Seminary Department. 1994, 116-123.

Jones, E.E., and A. Thorne. "Rediscovery of the subject: Intercultural approaches to clinical assessment." *Journal of Consulting and Clinical Psychology*, 55.4 (1987): 488-495.

Lu, F.G., R.F. Lim, and J.E. Mezzich. "Issues in the assessment and diagnosis of culturally diverse individuals." *Review of Psychiatry*, 14 (1994). Eds. J. Oldham and M. Riba,

Washington, DC: American Psychiatric Press.

Malgady, R.G. "The question of cultural bias in assessment of diagnosis of ethnic minority clients: Let's reject the null hypothesis." *Professional Psychology: Research and Practice*, 27 (1996): 73-77.

Miller-Jones, D. "Culture and testing." *American Psychologist*, 44.2 (1989): 360-366.

Niebuhr, G. "Vietnamese immigrants swell Catholic clergy. Growing influence on a changing church." *The New York Times*. 24 April 2000.

Oldham, J.M., and M.B. Riba, Eds. "Issues in the assessment and diagnosis of culturally diverse individuals." *American Psychiatric Press Review of Psychiatry*, 14 (1995): 477-510.

Ramirez, S. Z., et al. "Mental health providers' perceptions of cultural variables in evaluating ethnically diverse clients." *Professional Psychology: Research and Practice*, 27 (1996): 284-288.

Ridley, C.R., C.L. Li, and C.L. Hill. "Multicultural assessment: Reexamination, reconceptualization, and practical application." *The Counseling Psychologist*, 26.6 (1998) 939-947.

Rollack, D. and M.D. Terrel. "Multicultural issues in assessment: Toward an inclusive model." *Multicultural Counseling Competencies: Implications for Training and Practice*. Ed. DeLucia-Waack. 113-153. Alexandria, VA: Association for Counselor Education and Supervision. 1996, 113-153.

Sandoval, J., et al. *Test Interpretation and Diversity: Achieving Equity in Assessment*. Washington, DC: American Psychological Association, 1998.

Sundberg, N.D. and L.R. Gonzales. "Cross-cultural and cross-ethnic assessment: Overview and issues." *Advances in Psychological Assessment*, 5. Ed. Paul McReynolds. San Francisco: Jossey-Bass. 1981. 460-541.

Sue, S. "Measurement, testing, and ethnic bias: Can solutions be found?" *Multicultural Assessment in Counseling and Clinical Psychology* Eds. G.R. Sodowsky and J.C. Impara. Lincoln, NE: Buros Institute of Mental Measurements, 1996, 7-36.

Van de Vijver, F.J.R., and K. Leung. "Personality in cultural context: Methodological issues." *Journal of Personality*, 69 (2001): 1007-1031.

United States Conference of Catholic Bishops, *Program of Priestly Formation: 5th Edition*. Washington, D.C., 2006.

Westermeyer, J. "Cultural factors in clinical assessment." *Journal of Consulting and Clinical Psychology*, 55 (1987): 471- 478.

Ideally an assessment provides information that can be used to shape a Plan for Growth during formation. The major superior, vocation director, the candidate and all the formators should have access to and use the assessment.

# What happens with the assessment?

By SISTER MERCEDES J. McCANN, RSM

**T**HE FOLLOWING COMMENTS are based on my experience as a formator for nine years working with women in temporary vows as well as many years of doing consultation work with formators in numerous religious communities throughout the United States and beyond its borders. I found a common experience emerging that indicated a concern for the lack of written information available to formators about the women in the formation process. This concern was exacerbated in those communities whose novitiates were distant from the home communities of their respective novices. Upon entrance to the novitiate, behavioral health issues sometimes emerged, of which the novice director was unaware, despite three-way interviews involving the novice director, the novice and the sending formator. Novice directors lamented the fact that they had no written or even verbal information about these issues and felt they could have been forestalled had they known about them in advance.

In this article I would like to address the need for appropriate disclosure of assessment results, both formal and informal, written and verbal, to all formators who will

be working with an individual throughout that individual's formation process and the subsequent Plan for Growth that the candidate and formation directors can use as a template during the formation period. My remarks here are addressed to vocation ministers for religious communities, but these thoughts hold true for diocesan seminaries as well.

## The power of assessment

In an effort to observe confidentiality and to avoid prejudicing a formation minister with regard to the individual in formation, pertinent information is often kept from formation ministers and is known only to the community leader and the vocation minister. This is all very well and good if the only reason for assessment prior to entrance to religious life or ordained ministry is to screen out. However, ideally, an assessment should give a much greater return, both to the candidate and the community. This could be accomplished if the assessment were seen as both a way to screen out those with severe problems *and* a way to identify strengths and weaknesses for those who are admitted into a formation program. A full and thorough assessment would not just screen out problem individuals but would also be the basis for a Plan for Growth for those who enter formation.

Because of the considerable cost to the community, as well as for a multitude of other reasons, assessment is often one of the final steps before acceptance. By virtue of this fact, it often holds some mystical power for all concerned. It is unfortunate if that power is simply to screen out or screen in. The real power assessment has is to offer objective information that may be used primarily by the individual but

---

*Sister Mercedes J. McCann, RSM, Ph.D. is a member of the Institute of the Sisters of Mercy of the Americas, Mid-Atlantic Community. She is a clinical psychologist at Saint John Vianney Center in Downingtown, PA. She served as formation minister in her community for nine years and has worked with vocation and formation teams in setting goals and criteria.*



---

also by the community to help formulate a plan for living a more integrated and healthy life, regardless of whether the individual enters religious life. Presented this way both aspirant and vocation minister have the opportunity to devise an organic document—a Plan for Growth—which serves as a template for growth and progress in the formation process. The formal psychological assessment offers a baseline from which this growth can be assessed and plotted. It further offers a vehicle for conversation between the aspirant and the

The way the vocation minister introduces the need for psychological assessment to the candidate is critical. Its value as an instrument for growth should be the prevailing context.

vocation minister regarding how it confirms what the aspirant already knew about him or herself and what new self-knowledge it provides.

As a former formation minister and a psychologist, I have an abiding interest in the ongoing use of psychological assessments with men and women in the formation process.

I served as formation minister for nine years,

working primarily with women who were in temporary vows. In addition I sat on the Admissions Board of my community for several years. My experience has told me that psychological assessments could be better utilized by communities to the advantage of both the candidate for vows and the community itself. For this reason I submit that all formators who will be working with an individual have access to the psychological reports.

The roles of vocation and formation ministers are delicate. The individual in those roles is first and foremost the agent of the community. However, at the same time, he or she is the advocate of the individual in the formation process. This is a sensitive balance, and, as one experienced minister told me when I became a formator, the formator stands with feet in two worlds simultaneously, at times pleasing no one in either world. Throughout the entire process, the formator, with the help of the community, is assessing the ability of the individual in the process to live the life of a religious.

The way in which the vocation minister introduces the need for psychological assessment to the candidate is critical. Its value as an instrument for growth should be the prevailing context in which it is presented. The candidate becomes a partner in the formulation of his or her own life plan and

needs to understand that this partnership will extend to each formator with whom he or she will be working until final vows or ordination. Therefore, the candidate will have to sign a release of information that will include not only the major superior and vocation minister but also subsequent ministers with whom he or she will be working. If subsequent formators have access to the assessment results and to the original Plan for Growth, that plan has the potential to morph and grow with the individual throughout the formation process, and, indeed, throughout the individual's life. At the time of final vows or ordination, both formators and the individual will be able to look back over the Plan for Growth, as well as the entire formation process, and see clearly the progress the individual has made over the period of formation.

Of course, assessment throughout the course of formation has two major components, formal and informal. Both forms of assessment are crucial in developing a Plan for Growth, and the information contained in each should be passed on from formator to formator in the course of the individual's formation process. Therefore, when a candidate is signing a release of information, it should be made clear that the release includes both formal and informal assessment results. Though I am addressing specifically the formal assessment process, I would like to say something about the importance of the informal process for purposes of assessment. The observations of others in the informal assessment process provide an important component in the formulation of the Plan for Growth.

## Informal assessment

The informal process consists of the observation of the candidate as he or she attempts to live religious life. The persons observing are the formators and those in the community who live with, minister with or otherwise interact with the candidate. How these people experience the candidate is critical information in assessing the appropriateness of the individual for religious life. Feedback from these people to the candidate and feedback to the formator are critical to the healthy development of the man or woman seeking religious life. It is further necessary that a synopsis of the feedback be kept on file in the event that there is a personnel change in formators. Subsequent formation personnel need to be aware of patterns of behavior that the candidate has had, so that when a persistent pattern prevails, it can be identified and

---

acted upon. Of course, feedback should be given in a non-threatening manner and should include those observations that indicate a consonance with the charism of the community, as well as those that require attention. Hopefully the candidate and formator will have established a climate of trust that increases over time, and the candidate will view the process as one of mutual understanding and growth, rather than one of evaluation.

## Formal assessment

My comments on formal assessment of a candidate for religious life are predicated on the assumption that the community requires the candidate to undergo a battery of psychological assessments and behavioral scales to determine his or her mental health and his or her readiness to undertake the life of a religious.

Confidentiality is of utmost importance when dealing with the results of psychological assessment. I am assuming that all formators and religious superiors hold in strictest confidence the reports of assessing professionals with regard to the individual entering the formation process.

My personal bias is that behavioral assessments alone do not give a complete picture of an individual. To begin with, most behavioral assessments are self-reports. While one may assume that a candidate would not be purposefully duplicitous in answering these assessments, nevertheless the individual is not the best judge of his or her own behavior and may present a picture of him or herself that is colored by the prism through which it is viewed. A battery of tests, both projective and non-projective,<sup>1</sup> in conjunction with the candidate's behavioral assessments will yield a more complete picture of the person and one that is freer of bias than the behavioral assessment alone.

Who should be privy to the results of these assessments? Of course, the receiving community's major superior should be one recipient of the information. The vocation minister should be another. Assuming that subsequent formators in the community are sensitive to the confidentiality necessary when dealing with such sensitive issues, I suggest that something in writing be available to each formator responsible for the individual as he or she passes through the formation process. This raises a number of important points.

First, not everyone is conversant with the psychological lexicon. Therefore, the assessing psychologist would do well to issue two reports: one, the formal report written in the language of the profession and the second, a report that is

more user-friendly and would concentrate on those areas of strengths and weaknesses that the candidate possesses and that are germane to religious life. It is the second of these two that I am suggesting follow the candidate through the formation process and be accessible to all formators dealing with the candidate. There are several reasons for this suggestion.

Formation personnel change over the course of an individual's journey through the formation process. While three-way interviews among the candidate, the vocation minister and the formation minister may take place, as each subsequent minister interacts with the candidate, the recommendations of the assessing psychologist often get lost. A report on file that outlines the candidate's strengths and weaknesses and the psychologist's recommendations would ensure that consistency in addressing these attributes is maintained. That is, the strengths of the individual would be acknowledged and enhanced throughout the formation process, and the limitations would be addressed so that the individual would lead a healthier life as she or he progresses through the formation process and on through religious life.

Second, the report should be treated as a document from which a plan of action, what I am referring to as a Plan for Growth, can be developed. This plan would be an organic document that would be added to and deleted from as each recommendation in the psychological report is achieved. The plan would include goals and objectives that are measurable and that the candidate and formator can review on a monthly basis so that each can assess the progress the candidate is making as he or she moves through the formation process. While the basis of the plan may be the recommendations of the assessing psychologist, the plan might also include goals and objectives regarding spiritual development, community life and ministry as reflected through the informal assessment process.

Oftentimes religious communities use the behavioral and psychological assessments solely as a screening device to weed out those individuals who are not appropriate for religious life. Using the assessments in this way renders them stagnant and does not afford the individual or the community the full benefit of their results. By developing a Plan for Growth based on the

A report on file that outlines the candidate's strengths and weaknesses and the psychologist's recommendations would ensure consistency.

---

assessments and the needs of the community, the individual and the community continue to reap the benefits of the assessments over a period of years. In other words, it becomes a gift that keeps on giving. It also ensures consistency in the formation process as the plan moves with the individual through the process, and each formator with whom the individual interacts is a partner in its ongoing development.

Vocation and formation personnel have the obligation to educate candidates that the work of their lives is not over after novitiate but, rather, continues throughout a lifetime. Areas for improvement that emerge in an assessment will re-emerge in different forms over the course of a lifetime. Discernment is ongoing throughout the formation process, and the Plan for Growth provides a living, tangible document from which that discernment may develop. Since both the formator and the candidate have had a hand in its development, the plan reflects the dual discernment that is taking place.

## Plan for Growth

The development of the Plan for Growth begins with the ongoing work between the vocation minister and the candidate. Working in consonance with one another, they identify three or four areas that the candidate needs to work on in order to make a smooth transition into religious life. Under each area one or more goals may be established with measurable objectives for each of the goals. All of this is put in writing, with the candidate and the vocation minister each having a copy. The plan then becomes the living document from which their conversations grow over the course of their meetings. Hopefully growth will be observed, and the degree of seriousness with which the candidate is approaching the initial formation process will become evident. Once assessment takes place, goals and objectives emerging from the results of the assessment may be added to the document.

At the time of admission into the community, the Plan for Growth is submitted as part of the admission portfolio, and those on the admissions board have the opportunity to review the progress the candidate has made over the course of the discernment process. At the time of admission the plan is shared with the initial formator and subsequently becomes part of the formation process.

In order not to overwhelm a candidate, no more than four or five goals at a time should be in the Plan for Growth. As each goal is achieved, it can be deleted and new ones added. Each plan should be kept on file until ordination or final vows and should follow the candidate through

the formation process so that, at the end of the process, a complete picture of the progress the individual has made can be presented.

## How long is assessment relevant?

A word about re-assessment: the prevailing opinion at this time is that psychological assessments are only pertinent for three years, after which time, a re-assessment would offer more up to date information. Considering the cost of these assessments, it is not necessary that every candidate be re-assessed before final vows or ordination. However, where serious concerns were raised upon the initial assessment or where consistent concerns have emerged through the observations of formators or personnel living or working with an individual, a re-assessment may be warranted. If so, this re-assessment should be given at least one year before final vows or ordination so that the candidate is not on the doorstep of a lifetime decision and is being told he or she is not a viable candidate for that lifestyle. The re-assessment would yield one more piece of information about the psychological growth of the individual and her or his potential to live religious life.

The term, Plan for Growth, is an arbitrary one. Religious communities or seminaries may have a title that fits their programs more aptly. However, whatever its title, such a document could provide invaluable information both for the individual candidate and the community.

I am indebted to the many religious superiors and formators whose input has been the impetus for this article. Not only have they validated my own experience as a formator, they have also contributed creative insight into how formation processes may continue to improve for the sake of vocation ministry, religious life and the church as a whole. ■

---

1. Projective tests are defined as “performance-based measures that are less structured.... These tests are based on the premise that an individual reveals his or her personality when responding to an ambiguous stimulus, such as inkblots or more open-ended type questions,” by Eric Haas in “Tests for assessing applicants to religious communities,” on page 14 of this edition of *HORIZON*.

How does a vocation minister go about conducting a behavioral assessment?  
An experienced veteran offers her wisdom.

## When the vocation minister assesses: seeking consistent belief, word, action

BY SISTER CINDY KAYE, RSM

---

*When vocation directors begin their ministry, candidate assessment is usually a brand new world for them. To help them be effective in this new arena, the National Religious Vocation Conference offers two workshops: Behavioral Assessment I and II. In the following article Sister Cindy Kaye, RSM shares some of the wisdom she has acquired over several years from taking the NRVC workshops, conducting assessments and polishing her skills.*

*NRVC recognizes the need for skillful assessments by both vocation ministers and psychologists. Both bodies of information together can reveal a comprehensive portrait of a candidate's fitness to live religious life.*

**A**S I MOVE INTO MY SIXTH YEAR of vocation ministry, I still find this to be a most creative ministry for building relationships, trying new techniques to animate people and building upon the foundation laid by other vocation ministers. During the past three years, I have been working on building a behavioral assessment for candidates who are

---

*Sister Cindy Kaye, RSM lives in Burlingame, CA and is a vocation minister for the Sisters of Mercy. She has a master's degree in counseling, psychology from Concordia University in River Forest, IL and a master's in pastoral studies from Loyola University-Chicago.*



applying to live religious life. I have been fortunate to have had many opportunities to interview a number of women who were seeking something different in their lives. Certainly not all were candidates for religious life. Nonetheless, I had the chance to interview them, and in the process hone my listening and interviewing skills.

I was working with a candidate who had been divorced and began to think, "What will I ask about her second family life experience?" I started typing questions, and new categories began to emerge. In the end, I had 16 categories of behavior-based questions that are related to aspects of living. I have been fortunate to have had a number of people who were interested enough in my emerging behavioral assessment tool to offer critiques, additions, questions and challenges—all of which prompted me to further refine the assessment. (I hope someday to be able to make it available to vocation ministers.) Thus far, I have used this new assessment tool six times, and I have received positive feedback from sisters in leadership and also from testing psychologists.

The title of this article, "When the vocation ministers assesses: seeking consistent belief, word and action," reflects what we vocation ministers hope to see in those we welcome into our communities—new members whose beliefs, words and actions are congruent and self-grounding. While many types of behavior assessments exist, with different purposes for administering them, the behavior assessment we use with candidates applying to religious life is unique, in that two of the main components are to test for healthy behavior



#### **Contemplative Study & Retreat Sabbatical**

The demands and expectations of full-time ministry are both rewarding and fulfilling; however, it is important to take time to rest, renew, and regenerate. The Sonoran Desert provides a spiritual and contemplative environment that will make for a truly unique Sabbatical experience.

#### **Hesychia School of Spiritual Direction**

The Hesychia program focuses on the ancient art of Christian spiritual direction in a multi-faith context. Spiritual directors are prepared through contemplative study and practice, peer learning and spiritual mentoring to serve their spiritual community.

#### **Writing Hermitages & Private Retreats**

Directed retreats, private retreats and writing retreats are very popular options for your retreat experience. The desert allows you to seek the silence and space necessary for spiritual renewal.

#### **Redemptorist Renewal Center**

7101 W. Picture Rocks Rd, Tucson, AZ  
Phone: 520.744.3400  
[www.desertrenewal.org](http://www.desertrenewal.org)



and consistency. We look for consistency in what candidates say about themselves, in their ways of behaving, as well as consistency in what they believe, say and do in a variety of settings.

During the application process, most religious congregations offer three ways for a candidate to self report. The first is a written autobiography, in which the candidate reflects on personal history, perhaps covering areas such as family, church, relationship with God, personal relationships, professional life and religious life. The categories may vary from congregation to congregation, but the overall requirement is a written account of the candidate's life thus far. The second way for the candidate to self report is oral, via the behavior assessment, usually administered by the vocation minister. The candidate is offered behavior-based questions in a variety of categories. These responses generate a report, usually written by the vocation minister.

The third way for the candidate to self report is

through the psychological testing process, using a battery of standardized and non-standardized tests facilitated by a licensed, clinical psychologist. This includes a feedback session which may include the vocation minister, the candidate and the psychologist. The hopeful outcome of these three ways of reporting—the autobiography, behavioral assessment and test results—is that they reflect one consistent narrative. All three of these pieces are necessary for the most complete and accurate assessment of a candidate's emotional and psychological state as well as his or her way of acting.

All of this is written with the presumption that a vocation minister who is working with a candidate in the application process is receiving ongoing professional supervision from a licensed therapist who is knowledgeable about religious life, the respective community and Catholic culture.

## **What is the point of assessing?**

The purpose of a behavioral assessment by the vocation minister is to allow a candidate to verbally describe her or his ways of behaving day-to-day. It is also a way for vocation ministers to observe congruence or lack of congruence within the candidate's responses during the assessment time, in comparison with his or her autobiography, and later when compared to the results of his or her psychological tests. The behavioral assessment records behavior and consistency in oral reporting, while the psychological tests measure emotional and personality functioning. Finding that the candidate has healthy day-to-day behavior and that she or he is consistent in word and deed are positive signs that a candidate is probably healthy and mature enough to enter into a formation program. On the other hand, when a behavioral assessment shows that a candidate lacks congruence or lacks good daily behavior, the vocation minister will want to tread cautiously.

Recently I have offered my behavioral assessment report to the testing psychologist, along with the candidate's autobiography. (The candidate must sign release forms to do this.) Since the testing psychologist only sees the candidate once or twice for the testing process, having these two biographical pieces in advance helps in the interview and testing process. It is also helpful to me as a vocation minister to have the psychologist's extra set of eyes looking for discrepancies and for areas that may be of concern. Once again, the psychologist and I are also looking for congruence in the candidate's reporting.

Finally, a vocation minister's behavioral assessment

---

can be part of the body of information gathered during psychological testing. The assessment and the test results, together, can help shape the goals of the candidate's initial formation.

## Behavioral assessment piece by piece

The behavioral assessment that I have built takes about five or six hours of interview time and is to be completed in one day with breaks taken as needed. Although this is a long process, the information gathered is extremely valuable. The majority of the assessment is given orally. There are four separate pages where candidates report on feelings, behaviors, thoughts and images of how they view themselves at the point of the interview by checking off the words that apply to them. These are offered at selected times throughout the interview and offer a momentary break in the oral reporting.

The results of the behavioral assessment offer a number of insights on how candidates have functioned in a variety of areas in the past as well as how they are functioning currently. It reflects consistency and shows how they deal with issues within the following categories:

Family of Origin/Personal History	Decision Making
Family History (married candidate)	Health/Leisure
Conflict/Resolution	Church
Faith Journey	Prayer
Community Life	Vows
Relationships/Friendships	Sexuality
Ministry	World View

The questions presented in each of the categories are behavior-based. Questions that ask: "What did you do when...?" Or "Can you name your experience of...?" "Rather than "What would you do if...?" The questions are geared to the past and present and focus on behavior that took place or is taking place. To ask futuristic questions would lead the candidate into theory and belief rather than concrete behaviors that are or have been acted out.

## Basic skills for assessing

Sisters, brothers and priests come into vocation ministry from a variety of backgrounds and fields. They bring skill sets, ethical principles and accountabilities that have been honed in their previous fields. Upon entering vocation ministry, a whole new set of skills, principles and accountabilities are employed,

which may be different for them. In a sense, when beginning vocation ministry, ministers need to start anew, become intentional learners and focus, honestly, on their skill sets in relation to vocation ministry. They then self-educate according to the current needs, with an eye on what is missing in their skill set. Though we bring experiences of living religious life, memories of our own formative process, and perhaps some knowledge of the formation process within our respective communities, we must be willing to integrate our experiences and memories, (in some cases resolve them and free them) in order to focus on the needs at present.

If a vocation minister does not come from a ministry where interviewing was part of the job, and he or she does not possess that skill, it is wise to learn and practice it. Conducting an oral interview involves more than asking a battery of questions. It requires listening and responding with intuition and query into what is not being spoken as well as what is spoken. It also requires deep listening for inconsistency within the interview and also inconsistency in relation to the candidate's autobiography. Effective interviewing requires clarifying and paraphrasing and an ability to notice body language. Although the behavior assessment has a list of questions for each category, the assessor needs to be able to deviate from the list and go with the flow of the interview, often posing the next question from the last answer of the candidate or asking for an expansion or clarification of the last answer. Relational skills are also needed to provide a level of trust and comfort for the candidate. If the interviewer is nervous and grappling for the next question or comment, most likely the candidate will feel uneasy, too.

If a vocation minister does not come from a ministry where interviewing was part of the job, and he or she does not possess that skill, it is wise to learn and practice it.

## What if you lack the skills?

Not every vocation minister may be comfortable conducting an interview. To know this about oneself is positive. Although the vocation minister normally administers the behavioral assessment, it is not uncommon or unreasonable to ask another vocation minister who is skilled at interviewing

---

to administer the assessment. Most important is that the information gathered be accurate and that a well-written report, which clearly reflects the candidate's way of being, be the final product of the assessment.

## Preparing to assess

Prior to the behavioral assessment interview, it is important for both the interviewer and the candidate to feel well-rested and fresh. If the interviewer is tired or feeling spent,

Sometimes words can be misinterpreted and answers can appear incongruent. Here is where deep listening and intuition on the part of the assessor come into play.

the interview may lag or information may be missed or misunderstood. It is also important for the interviewer to let go of any thoughts or distractions from his or her own life that would distract from his or her attention to the interview. A short prayer or a brief intentional time of silence may help

start the interview in a more relaxed and focused mode.

Each time I administer the behavioral assessment, I prepare by reviewing the autobiography of the candidate, as well as by looking at each category of the assessment and noting three key points from each category that I want to glean from the interview. Key points will differ for each candidate. I type the points and keep the list in my range of vision throughout the interview. I change categories only after I have clarity on the three points. Also, even though the interview questions are familiar to me, I review them the day before the interview and prepare for typing the responses by category. Responses are recorded during the interview and can be done on the computer, or by hand; whichever works most efficiently for the administrator is the way to go.

## Ironing out interview discrepancies

As explained earlier in this article, part of the behavioral assessment is checking for consistency between the responses and the candidate's autobiography and consistency within the assessment itself. Sometimes words can be misinterpreted and answers can appear incongruent. Here is where deep listening and intuition on the part of the assessor come into

play. For example, if early on in the interview the candidate speaks of having many friendships, going to many parties and having an active social life, and toward the end of the interview states that he or she often feels lonely and isolated, there is cause here to question the candidate more. Where is the loneliness coming from? The candidate may be telling two different stories. Or the person may explain that he or she feels lonely when dealing with difficult family issues or when seeing friends in good relationships with their families while the candidate does not share those same experiences. If the assessor does not probe further during the interview, the report may show the candidate telling two different stories—when in reality there is no discrepancy. The person could be in good relationships with friends, but find that family issues bring on a personal loneliness that makes them feel apart or isolated at times. Listening and recall on the part of the assessor are important. Remembering back to the earlier part of the interview allows for questioning at the point of discrepancy rather than recording both responses as a discrepancy.

## Writing the report

Time is of the essence when writing the report from the information gathered during the behavioral interview. It is best to start writing the same or the next day so the material is not lost. Although notes have been recorded, it is best to write the full report when the material is most fresh in the mind of the assessor. As in psychological testing, the psychologist only reports the findings of the test materials. The report of the behavioral assessment is written only from the responses of the candidate. Feelings, thoughts and opinions of the assessor or vocation minister don't play into the written report. In other words, No "I" statements are used in reporting the information gathered from the behavioral assessment. Only the responses of the candidate are appropriate. For example, statements such as, "Karen was embarrassed during the sexuality portion of the interview," would be a judgment made by the assessor. Unless Karen said, "Oh, I'm so embarrassed," the assessor is guessing or giving information that may not be accurate. The assessor could say, "At the beginning of the sexuality portion of the assessment, Karen's face became flushed. She began wringing her hands, and her speech changed from a moderate volume to a soft tone with stuttering." The latter reports behaviors that were observed by the assessor, rather than guessing that embarrassment was an emotion that she was feeling. Ideally, the assessor would query

as to Karen's changed demeanor. Her feeling could be terror, shame or a number of other emotions. Unless the assessor checks out the behaviors with Karen, her or she can not accurately assess the change in behavior.

The report needs to be clean, in that only the responses of the candidate are written. This is why it is important to iron out discrepancies within the interview rather than speculate on or ignore the behavior altogether. The report is 10-15 pages and is organized by category, with an introductory page listing to whom the report is going, the assessor's name, the date, the purpose of the report and the stated fact that the candidate understands the nature of the interview and has signed the necessary release-of-information document.

The letter of recommendation (or non-recommendation) is written at a later time by the vocation minister. This is the place to voice concerns and reflect upon experiences of the candidate.

## Working with the testing psychologist

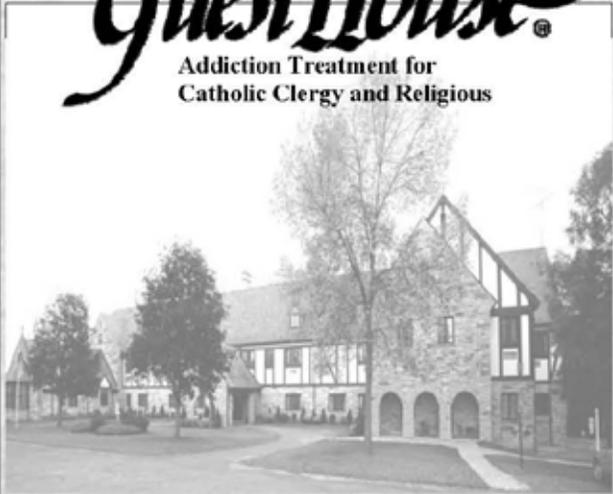
In preparation for psychological testing, it is helpful for the vocation minister to meet with the testing psychologist to inform him or her of what is required regarding testing and the reason for the referral. (For a more thorough treatment of this subject, see Overview of assessment: why, what and how to assess by Ronald J. Karney on page 4 and "Vocational discernment and the psychological report" by Sister Mary M. Lindsay, SSJ on page 18.)

It is important that the chosen psychologist be skilled in test administration, scoring and interpretation. It is also the responsibility of the vocation minister to educate the psychologist about the charism of the community, its lifestyle (monastic, cloistered, apostolic, missionary) and its culture—as well as to ensure that the psychologist understands Catholic culture. While the community may have a list of suggested psychological tests, it would be unwise to assume that the same tests will fit all candidates. Therefore working collaboratively is essential to getting a comprehensive picture regarding a candidate's suitability for religious life. Here is where both the candidate's autobiography and behavioral assessment reports may be helpful to the psychologist.

Prior to offering the behavioral assessment report to the testing psychologist, it is helpful for the vocation minister's supervisor to see the report. As stated earlier, most vocation ministers are not psychologists, and often they have not had report writing experience. Consultation with the supervisor allows not only for a review of the assessment report and its

**“Amazing  
Grace”  
happens at**

**GuestHouse**  
Addiction Treatment for  
Catholic Clergy and Religious



**Grace** [greys]:  
Kind, forgiving or compassionate  
treatment of or disposition toward  
others. The quality of being or  
acting in accordance with  
what is Holy or Sacred.

**Let the  
transformation  
begin at**

**GuestHouse**

**For information on addiction treatment call:  
800-634-4155  
or visit our website at [www.guesthouse.org](http://www.guesthouse.org)**

---

Saint Charles Borromeo Seminary and The Saint John Vianney Center proudly announce



## *A Necessary Conversation: A Gathering of Experts*

**This conference is a direct response to the Vatican's invitation to a new dialogue among and between Vocation and Formation Ministers and Psychologists. It will focus on understanding the psychological assessment of candidates and teaching specific interviewing skills. Vocation and Formation Ministers of all experience levels are invited to attend.**

**June 14 to 18, 2010**

Saint Charles Borromeo Seminary, Wynnewood, PA

Registration information and schedule of events are available online at:

[www.scs.edu/events/psychology-formation-conference.htm](http://www.scs.edu/events/psychology-formation-conference.htm) or [www.sjvcenter.org](http://www.sjvcenter.org)

Application is being made to the American Psychological Association for continuing education credits for psychologists.

For details, please contact [gmclone@sjvcenter.org](mailto:gmclone@sjvcenter.org)

contents, but also a review of the overall form and content of the report. A testing psychologist may choose to review the autobiography and behavioral assessment before or after the tests are scored. Either way, the hope is that the vocation minister will have an extra set of eyes—those of the testing psychologist—to check for consistency in the narratives of the three documents (autobiography, behavioral assessment report and actual test results).

### **Healthy and whole**

Clearly, then, to gain as much insight as possible into a candidate's thoughts, words and actions, three components are needed: an autobiography written by the candidate, a behavioral assessment administered by a vocation minister and psychological testing administered by a

psychologist. Together these provide a comprehensive profile of a candidate's suitability to live religious life. While the assessment process in the past was primarily used to determine entrance into the community, today the reports can be of ongoing value in helping the candidate form goals and growth plans as she or he moves through the incorporation process.

Certainly the process of assessment requires time and a depth of mental and emotional concentration. When the candidate undertakes the process with openness and sincerity, the great effort it involves on everyone's part can be an opportunity for the candidate to mature, grow and develop. A well-done behavioral assessment can be a key component in encouraging healthy, whole candidates and a vibrant, healthy community. ■

Maintaining professional boundaries creates a healthy and ethical environment in which vocation ministry can thrive.

# Establishing and honoring boundaries in vocation ministry

BY CHRISTY SCHILLER

**F**OR TWO DECADES, Praesidium has worked with a wide range of organizations that serve children and vulnerable adults to help them minimize the risk of sexual abuse or exploitation of those in their care by a staff member, a volunteer, or a peer. In recent years, we have witnessed a specific, growing need for education among professionals who work with adults on how to keep these relationships safe from abuse or the perception of abuse. Indeed, we have received more and more phone calls from organizations seeking consultation on allegations and incidents of sexual exploitation between staff/volunteers/ministers and adults being served in their programs or ministries. The goal of this article is to share some of our observations and experiences in this realm and help apply both particularly to vocation ministry.

Perhaps one of the most poignant lessons that Praesidium has learned in this work is the significance of healthy boundaries as a means to prevent abuse in all of its forms: physical, emotional and sexual. Individuals who abuse adults can be predators who consciously try to break down boundaries, but they can also be unhealthy or even naïve individuals who do not acknowledge their own lack

of professionalism. For example, a vocation minister who is conscious of professional boundaries and has a solid foundation in ethics is far less likely to find himself or herself in an unhealthy relationship with a candidate. A vocation minister who is less experienced may not recognize when he or she is really more of a spiritual director, therapist, or even friend to a candidate than someone who is helping him or her discern religious life in a given community.

When we see boundary violations, it is an opportunity to interrupt an inappropriate relationship and potentially prevent abuse or exploitation. This article explores the boundary issues that are unique to vocation ministry, outlines safeguards that vocation ministers can implement to minimize risk, and highlights specific boundary violations to avoid.

## Issues unique to vocation ministry

While many of the points in this article may be generalized across ministries with adults, it is important to recognize boundary issues and other risks unique to vocation ministry. Four key aspects of vocation ministry create unique risks: 1) non-mutual self-disclosure, 2) candidate's infatuation with religious life, 3) minister's natural tendency toward advocacy for the candidate and 4) communication barriers.

**Non-mutual self-disclosure** Chances are the vocation minister has access to a great deal of extremely sensitive information about the candidates he or she works with. Vocation ministers may review a candidate's medical records, psychological evaluations, sexual history and may have even interviewed a candidate's family members. Similar to the dynamic seen in spiritual direction or professional counseling, access to such very personal data gives the vocation minister

---

*Christy Schiller is the director of religious accreditation at Praesidium, an organization that assists those whose work puts them in contact with vulnerable populations. Ms. Schiller has worked with hundreds of religious organizations to ensure safe ministry. Contact her at: [cschiller@praesidiuminc.com](mailto:cschiller@praesidiuminc.com).*



---

a great deal of power in the relationship—power that can be used to exploit an individual. Though the minister may not always be conscious of this power, it is very real and can purposefully or inadvertently lead to exploitation.

On the other hand, some vocation ministers may find this seemingly one-sided relationship awkward and feel compelled to share personal information about themselves to create a sense of balance. Unfortunately in doing so the minister is crossing a professional boundary by losing sight of his or her responsibility to familiarize the candidate with the community, not with the minister personally.

**Candidate's infatuation with religious life** Some candidates may have a fascination with or over-romanticized image of religious life. Though the discernment process should help the candidate develop a healthier or more reasonable understanding of religious life and living the vows, a vocation minister is inherently placed in a position to represent not only his or her own community, but often the entirety of religious life, and even the church. Once again, this creates a vulnerability that can be exploited.

**Minister's natural tendency toward advocacy for the candidate** Many ministers, by their pastoral nature, are quick to see all of the good in a candidate. He or she may personally like a candidate, and the minister may want to mentor the candidate through discernment—even though the candidate may **not** necessarily be the best fit for the community. A vocation minister may also have real or perceived pressure to develop candidates in order to avoid an empty formation class.

The more familiar the minister becomes with the candidate, often the harder it is to see the writing on the wall that he or she is either not a good fit for the community or is simply not ready for religious life. This phenomenon is similar to what is referred to as “transference” and “counter-transference” in a professional therapy setting. Transference is when a client projects aspects of other relationships in his or her life on to the therapist. For example, he or she may see the therapist as a paternal figure or as someone with “guru” status on whom they become extremely dependent. Counter-transference occurs when the therapist becomes emotionally entangled with the client and may play in to the client's transference. Indeed, this is a very human response but one ministers should strive to remain conscious of and try to avoid.

Regardless, vocation ministry is about finding a good fit for the community, not pounding a square peg into a round hole. Professional boundaries can get sloppy if ministers do

not keep this in the forefront of their analysis of the data they collect about the candidate, and not maintaining boundaries can be a disservice to the community and the candidate.

**Communication barriers** This aspect of the ministry is perhaps the most tangible presentation of the power differential. Candidates recognize that the vocation minister's role is to evaluate him or her on a number of levels, which can create a barrier that prevents a candidate from coming forward with concerns about the conduct of the vocation minister or other community members to whom they have been introduced.

A candidate (or a novice; we have also seen this phenomenon in formation programs) may not feel he or she has a right to say they have been made to feel uncomfortable or even exploited and may even fear rejection if they do. Here again, the disproportionate power dynamic between minister (or the community in general) and candidate is amplified, creating increased risk for exploitation or abuse.

## Keeping your vocation ministry safe

All of the factors described above add up to a great deal of power on the part of the vocation minister. As uncomfortable as it may seem, this differential must be recognized for appropriate boundaries to be established and maintained. Vocation ministers can do at least four things to minimize the risk of this power differential leading to actual or perceived abuse or exploitation.

### 1) Acknowledge the power of your role

Like it or not, vocation ministers have a great deal of power over candidates—who are probably at a very critical moment in their lives. When an individual is discerning vowed life, he or she is emotionally and spiritually exposed. He or she deserves the respect and dignity of anyone who is vulnerable, and acknowledging the power differential is the first thing a vocation minister can do to facilitate that.

Additionally, legal precedent suggests that the person who has more power in a professional relationship is responsible for maintaining the propriety of the relationship because the person with less power is unable to fully consent. We have seen many cases of unethical behavior in ministry when a minister either consciously downplays this dynamic or is simply naïve about its significance.

Many organizations have developed strict professional, ethical guidelines and require professionals to complete



# THE NATIONAL SHRINE

OF OUR LADY OF THE SNOWS

MISSIONARY OBLATES OF MARY IMMACULATE

442 S. DE MAZENOD DR. BELLEVILLE, IL 62223  
WWW.SNOWS.ORG • 618.397.6700

**Located on 200 beautifully landscaped acres just 15 minutes from downtown St. Louis, Mo., the National Shrine of Our Lady of the Snows is the perfect place to host your next retreat or getaway.**



### What the Shrine has to offer your group:

- 8,000 square foot conference center to accommodate groups from 5 – 500
- AAA rated hotel featuring a deluxe continental breakfast, fitness center, WIFI, and discounted group rates
- AAA Full service restaurant
- Religious programming year round
- 12 devotional sites

For more information on any services offered or to make reservations please call 618.397.6700 or visit online at [snows.org](http://snows.org)

regular continuing education in this area. Vocation ministers are fortunate to have the NRVC resource, Code of Ethics for Vocation Ministry, (The Code of Ethics is available online at [www.nrvc.net](http://www.nrvc.net). See “Public Documents” on the left side of the homepage.) The guidelines set forth in this document provide a framework for defining professional boundaries in this unique ministry, and it is critical that all vocation ministers be familiar with it.

## 2) Stay healthy

The most common pattern we see of abuse or exploitation of an adult is when a minister is vulnerable to boundary issues due to stress, loneliness, burn-out, or lack of skills to cope when someone pushes their boundaries. Ministers who are not healthy—physically, spiritually, emotionally or otherwise—have diminished ability to honor their duty to maintain professional boundaries.

Make sure you are getting all of your needs met in healthy ways. If you are struggling, seek help. Make time for

yourself, and try to remain self-aware enough to pick up on red flags within yourself, such as seeking friendship from those to whom you minister, or excessively looking forward to meeting—or even fantasizing or daydreaming about—a particular candidate.

## 3) Articulate systems of support and accountability for your ministry

Strongly articulated systems of support and accountability can provide very useful checks and balances to ensure ministerial relationships are healthy and appropriate. Support can come in the form of adequate time off, professional development, spiritual direction, or simply the ability to bounce ideas off of other community members.

Accountability may be defined as feedback through supervision. Let candidates know that you have a supervisor, and there is always someone they can go to with concerns. Check in with others if you have concerns about boundaries in a particular situation.

### ***Boundary violations: case studies***

A candidate visited the community during a discernment weekend. After one of the evening socials, the vocation director asked another community member to share with the candidate how she struggled for years with an eating disorder. The vocation director knew from the psychological evaluation that the candidate was having difficulties in this area and thought it would make her feel better.

A vocation director invited a candidate to stay at the rectory and observe community life over the Easter holiday. One of the elder friars made the candidate extremely uncomfortable by asking him about his sexual history. The candidate was worried that if he told the vocation director he would be labeled as a complainer and not accepted into the postulancy program.

reason will inhibit his or her ability to maintain healthy boundaries. A good rule of thumb is, if it is unclear, bounce it off of others before deciding what to do, and always, always document your interactions.

In general, some behaviors are best to avoid altogether:

- engaging in dual relationships, such as acting as a candidate's spiritual director, confessor or confidante,
- spending a disproportionate amount of time with a particular candidate,
- making inappropriate self-disclosures, such as one's own experience with abuse, difficulties in personal relationships, or spiritual struggles,
- giving and receiving special gifts,
- discussing your sexual fantasies or activities,
- commenting on someone's body, and
- failing to adhere to accepted standards of affection in ministry.

It is quite possible that a vocation minister may himself or herself be made to feel uncomfortable by a candidate. While this may simply reflect the phenomenon of "transference" described earlier, ministers should pay attention if they feel they are being flirted with or being perceived in any way that is less than professional. Here again, document this and talk with others in the community about the best way to proceed. It may indicate a lack of maturity or even some unresolved issues in the candidate—all which are important data as decisions are made.

After two decades of experience researching and investigating cases of institutional abuse, our paradigm at Praesidium that establishing and maintaining healthy professional boundaries is the key to abuse prevention holds strong. This is even more evident when there is an inherent differential of power in a professional relationship.

Because the power differential in a vocation minister/candidate relationship is real, maintaining the professional boundaries in it is up to the minister. Maintaining professional boundaries keeps candidates, vocation ministers and religious institutes safer. Healthy vocation ministry also helps model for candidates how appropriate boundaries in any ministry should look. After all, you want people's first impressions of the community to be of healthy ministers living the Gospel and doing great ministry. ■

## **4) Document, document, document**

Ministers should document regular communications and interactions with candidates, as well as any unusual conversations or circumstances, such as if a candidate is particularly vulnerable or says something inappropriate. Such observations, and how the vocation director responds to them, will help the community make admission decisions.

### **Behaviors to avoid**

There certainly are gray areas where it is not clear where the boundary is. For example, informal get-togethers like meeting up for a drink may be a great way to check in with a candidate. In any ministry, the minister needs to consider his or her own safety during a one-on-one meeting and it is usually best to invite others. Not only will this be more professionally appropriate, but it will give others a chance to get to know the candidate and provide the minister with feedback on his or her observations. The minister is, of course, advised not to drink to excess since having diminished

# BOOK NOTES

## Young Catholic women speak up; a sister reflects on a life of service

BY SISTER KAREN OWENS, SSJ AND CAROL SCHUCK SCHEIBER

### FROM THE PEWS IN THE BACK

**F**rom *the Pews in the Back* (Liturgical Press 2009) is an anthology of 29 essays from young American Catholic women reflecting on the significance of Catholicism in their lives. The writers are women born in the 1970s and 1980s, into a post-women's rights movement, post-Vatican II era, and they share with readers defining moments, graces and struggles as Catholics. The writers are disproportionately well-studied in theology and religious studies and could be labeled "progressive Catholics." The voices of women with more moderate or traditional perspectives on the Catholic Church and the many whose theology training consists of Sunday Mass are not well represented in this work. By leaving out these other viewpoints, I believe the book offers only one side to the major church and social issues raised. While this work is not a comprehensive picture of the thoughts, experiences and characteristics of all young American Catholic women, it is a good

*Sister Karen Owens, SSJ is a novice with the Sisters of St. Joseph of Philadelphia. At age 29, she has worked as a homeless shelter case manager and as a union organizer for hotel workers in Philadelphia.*

*Carol Schuck Scheiber is editor of HORIZON and Focus on Vocation Ministry and is content editor of VISION vocation guide.*

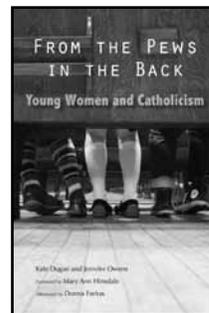


beginning, ushering forth one set of voices of this diverse group of Catholics.

The writers share the important experiences with and influences of Catholicism in their lives; reading this compilation, I found myself doing likewise. I recollected warm moments with Communion dresses and vibrant parishes, the pain in encountering major divisive issues in today's Catholic Church (like women's ordination, the marginalization of homosexuals, the sex abuse scandal), and thanksgiving for the many graces given and shared as part of the Catholic community.

This book shows the power of a Catholic identity, which can shape one's education, ideal companion, rites of passage into adulthood, and the lens through which one perceives life. Some writers focus on Catholicism's commitment to service and social justice, sharing their blessed experience of finding God while companioning those in need. Others address the complexity of being an American Catholic woman, a young adult searching for a vocation or a woman with a call that cannot be realized within her church. The essayists discuss the gift of a Catholic spirituality, of finding a home in the church's rituals and finding welcome in America's culture of intermingling traditions.

In many ways, reading this work enlivened me;



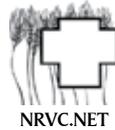
# Three reasons every household in your community should have its own copy of HORIZON

1. Members would be able to keep up with vocation trends and learn about the potential candidates headed their way.
2. HORIZON can reach every member and engage them in important vocation-related discussions even when you can't.
3. Every member's awareness of, commitment to, and concern for vocations is essential to the life of your community.



**AFFORDABLE SUBSCRIPTION RATES**  
1-5 U.S. subscriptions: only \$24 each  
6 + U.S. subscriptions: only \$22 each

**Begin new HORIZON subscriptions for member households today!**  
Simply email us at [nrvc@nrvc.net](mailto:nrvc@nrvc.net) with shipping and billing information.



however, I found myself disheartened by the frequency of anger and frustration expressed toward the institutional church. A significant number of the writers feel excluded and dislike the stance the institutional church takes on a number of divisive social issues. I have two main concerns regarding the disillusionment and anger in this work. First, I wonder if the degree of anger expressed is productive for readers; does it fuel the divisions or allow for communal healing and transformation? Second, is this book's focus on the issues that are divisive leaving out other important experiences of today's young women within their church? The issues and anger raised in the book are very prevalent in today's church, especially for American women of all ages, and should have a place in this work, but there is so much more that could be shared from this generation that is absent in this book. For instance: there is a new wave of women entering religious life; there are parishes full of rich community; and there are parishes closing, causing a hole in some women's Catholic identity.

It is difficult to belong to a living entity full of varying opinions and deep-seated practices, but that is part of belonging to the Catholic community. While I understand the anger and pain, I do not believe that our perceptions as Catholic women have to be from the back pews. For a number of women in this work, disillusionment led to transformation with healing, a call to action, and/or deeper faith in God. The women are engaged in and greatly impacted by Catholicism. They express a great tension between anger and love for a church that is theirs even when they do not agree with it.

It is in this connection with the church and its communal faith where I find the common hope among the writers, maybe even for all Catholics. Each writer's expression of her life as Catholic—through all the joy and pain—is ultimately an exploration of her relationship with Communion.

Collectively, the essays show the great gift of experiencing Communion as Mass attendant, community participant, servant and advocate for justice (even within the church). Most of the women give voice to the power of, the

connection with, and the longing for Eucharist throughout their lives. The writers who express the most frustration and anger with the church, also speak of the hold that the rituals, the Mass and the Eucharist have on them. As one mother discerns whether to raise her son in a church she disagrees with, she cannot relinquish Catholicism from her or her son's life because, as she states, "there is nothing that can take the place of Eucharist...God became flesh and dwelt among us. I want him to have that. This life is imbued with the divine" (185). The gift of Eucharist draws the women into the pews, even if they feel they are in the back.

Communion also roots them in the Catholic faith for life beyond the church building. It is the presence of God in all things, the sacredness of life, which places Jesus at the heart of their communities. Communion is found in a mother's love as she nurses her child, in the play of childhood, and in dining with family and friends. Despite the friction, the writers express their fidelity to the church as community. One writes, "I always feel pulled back to the church that helped raise and form me, the way we feel drawn back to our families even after a bitter fight" (144). These essays convey the blessing of finding and celebrating one's place among the people of the church and in finding God in everyday experiences.

Jesus knelt down and washed the feet of his disciples, commanding them to do likewise. It is an act of communion ritualized on Holy Thursday and lived in the acts of service, in the "soul to soul" connections of his many disciples today (127). This call to serve and the power of Catholic social teaching are essential in understanding why and how many young women identify as Catholic. The book offers numerous encounters with service and with its ability to teach and transform. Whether in Mass, in the everyday, or in service, it is the multi-faceted gift of Communion that provides the most truthful answer for why young American women identify as Catholic. The Eucharist is a gift from and of God that the writers do not wish to live without. It compels, moves and roots them in life.

*From the Pews in the Back* allowed me to look into the hows and whys of my identity as a Catholic and my commitment to its faith tradition. The work also provided an opportunity to reflect on my confusion with the anger others hold toward the church. For me, the essays became an exploration of the great mystery and presence of Communion in the lives of young Catholic women; it is the heart of the journey. Communion holds these women to the Catholic Church and is what unifies and sustains us as a faith community. One woman's explanation for her fidelity to

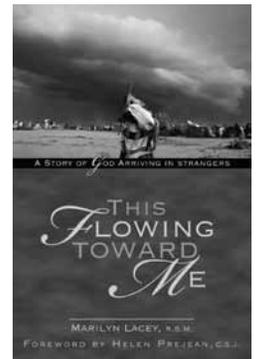
Catholicism was simply, "Because it's home" (10). How lucky we are that home is Communion together, with God, and with all the gifts and challenges of a human community. We are indeed graced. —Reviewed by Sister Karen Owens, SSJ

### THIS FLOWING TOWARD ME

In her book *This Flowing Toward Me: A story of God arriving in strangers* (Ave Maria Press), Sister Marilyn Lacey, RSM doesn't explicitly discuss the concept of *vocation*, but as the reader is absorbed into her vividly-drawn world of service to some of the world's poorest and most outcast peoples, it becomes clear that this work, in fact, is a book-long meditation on vocation. By the end of this work, a reader feels as if he or she has been looking over the shoulder of this tireless sister, listening to her funny anecdotes about cross cultural ministry, meeting refugees who have survived incredible odds, and absorbing her hard-won wisdom.

Lacey's warm, conversational style and engaging stories draw in readers. Those who stick around are treated to her insightful commentary on the connections between faith and justice. Lacey skillfully avoids strident rhetoric about the social conditions and policies that affect the lives of refugees. Yet she points out the many ways our country and our Christian community have fallen short of extending hospitality to the strangers in our midst—the millions of displaced peoples who have fled their homelands because of war or persecution.

This is a book that brings the reader up short, reminding him or her that our middle-class American lifestyle is truly privileged, especially when contrasted with the destitution of refugees. Lacey herself feels the tension between the life she lives in the U.S. and the lives of those she had lived with in refugee camps. While Lacey's awareness of the gross inequalities is sharp, she doesn't fall into the trap that so many Americans do when reflecting on our vast cornucopia of food and goods. Materially, the book notes, most of middle America is doing pretty well. However, when it comes to the rich, close-knit bonds of community—a resource some materially poor refugees enjoy—Americans can indeed seem impoverished. This insight into the crippling loneliness and isolation so prevalent in the United States is one that naturally flows from Lacey's time among people who come from more communitarian parts of the world.



---

The cultural and social insights that Lacey passes on make excellent reading. However, the heart of the book, and the aspect upon which the title is based, is its reflections on her spiritual journey. Lacey doesn't much employ the vocabulary that permeates vocation ministry: vocation, calling, discernment. But clearly, her work with refugees began with a tangible experience of call. Lacey's dedication to refugee work started innocently enough when she volunteered to help receive refugees at the San Francisco Airport one day. The volunteering grew; she became close to a refugee family; and then a searing dream one night, in which the family invited her to learn a "new way of loving," convinced her that God was urging her to reach out to refugees. From that point onward, Lacey's life became immersed in their world. She volunteered for a spell at a refugee camp in Thailand. She earned a graduate degree in social work to equip herself for stateside refugee work. She became director of refugee and immigration programs for the Diocese of San Jose, CA.

In recounting her experiences over 20-plus years in refugee ministry, Lacey is unafraid to reveal that following what you think is God's will may make you doubt the presence of God at all. One of the book's most memorable chapters is the one in which she conducts an argument with God for having allowed entire populations of people to suffer terrible oppression, mistreatment, torture and death. In true distress at this monumental suffering, she asks the question of the eons: why, God, do you let your children down? Why so much suffering and hunger for some, while others enjoy ease and plenty? She comes to form a new vision of God:

... God and I wept together in that Berkeley garden. Since that moment, I have understood God differently. No matter what the theologians may say to the contrary, God is not All-Powerful, at least not as most of us understand power. Why not? Because those who love never exert control over others. Because loving makes us utterly vulnerable.... Love wants to be with the beloved. Love can't fix things, but love always knocks and comes right in to be with the beloved in the midst of their suffering, even to the depths of hell. (50)

Reading about Lacey's spiritual growth during her refugee ministry, it is clear that each step along her path was a vocational step, although she doesn't call it that. Each movement toward this "new way of loving" was, for Lacey, a step toward God, toward uniting herself to God's way. She reflects on a spiritual epiphany she underwent while leafing through a book in a bookstore years into her refugee work.

The poem "The Music," by the Sufi poet and mystic Rumi of the 13th century, seemed like a direct message from God—a calling, if you will, to recognize God's constant "flowing toward me."

Now, out of idle curiosity I picked up *Open Secret*, a slim paperback volume of Rumi's poems, and flipped casually through it. And right then and there in the middle of that shop, this prayer leapt off page seventy-four and loosed in me a sudden wild flood of tears....

Not for a second has God forgotten me. Even more amazing: I am in fact the guest whom God constantly welcomes. Since this is true, what else could possibly matter? (155).

*This Flowing Toward Me* is a book to savor no matter where a reader might find him or herself on the vocation journey—whether pondering a possible calling or trying like the dickens to stay faithful to vows made decades ago. Lacey's stories and insights will edify and encourage any reader who cares about what it means to follow Jesus today. ■

—Reviewed by Carol Schuck Scheiber

---

STATEMENT OF OWNERSHIP, MANAGEMENT AND CIRCULATION

Publication title: HORIZON. Publication number: 0744-850. Filing date: 10-1-09. Quarterly; 4 issues each year.

Subscription price: \$27. Office of publication: NRVC, 5401 S. Cornell Ave., #207, Chicago, IL 60615, (773) 363-5454.

Name and address of publisher: National Religious Vocation Conference, 5401 S. Cornell Ave., #207, Chicago, IL 60615.

Contact person: Debbie Prieto. Editor: Carol Schuck Scheiber, 448 Decatur St., Toledo, OH 43609. Managing editor: same. Bond holders, etc.: none. Tax status: no change. Circulation data based on June 17, 2009. Average figures for preceding 12 months. Average total number of copies (net press run) 1975. Average paid/requested outside county mail subscriptions stated on form 3541: 1313. Average sales through dealers and carriers, street vendors, counter sales, and other non-U.S.P.S. paid distribution: 0. Average paid in-county subscriptions: 92. Average of other classes mailed through the U.S.P.S.: 68. Average total paid and or requested circulation: 1473. Free distribution. Free distribution by mail (samples, complimentary, and other free) average outside county as stated on form 3541: 60. Average in-county as stated on form 3541: 8. Average other classes mailed through the U.S.P.S.: 81. Average free distribution outside the mail: 78. Average total free distribution: 227. Average total distribution: 1700. Average copies not distributed: 275. Total: 1975. Percent paid and/or requested circulation: 87%. Figures for single issue published nearest to filing date. Paid and/or requested copies. Number of copies of single issue published nearest to filing date (last issue): 1800. Number of paid outside county subscriptions for last issue: 1207. Number of paid in-county subscriptions: 85. Sales through dealers and carriers, street vendors counter sales, and other non-U.S.P.S. paid distribution for last issue: 0. Number of other classes mailed through the U.S.P.S. last issue: 176. Total paid and/or requested circulation last issue: 1468. Free distribution by mail of last issue (free samples, complimentary, and other free) average outside-county as stated on form 3541: 60. Last issue in-county as stated on form 3541: 10. Last issue other classes mailed through the U.S.P.S.: 72. Last issue free distribution outside the mail: 60. Last issue total free distribution: 202. Last issue total distribution: 1670. Last issue copies not distributed: 130. Total: 1800. Percent paid and/or requested circulation: 88%.

Truth  
in Numbers

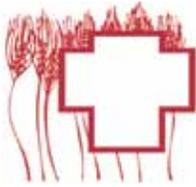
# 55 percent

of Americans say they have been touched by a guardian angel.  
Are they thinking of you? Discover new ways to help your  
neighbor and expand your ministry with an MA in Pastoral  
Studies from Loyola—now available online.

**Institute of Pastoral Studies • [LUC.edu/grad/horizon](http://LUC.edu/grad/horizon)**



*Preparing people to lead extraordinary lives*



**National Religious Vocation Conference**

5401 S. Cornell Ave., Suite 207

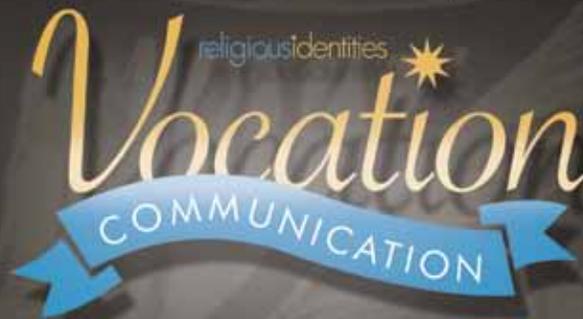
Chicago, IL 60615-5698

www.nrvc.net nrvc@nrvc.net (773) 363-5454

Periodical

# Our Design Pieces Win Awards.

*[As well as the hearts and minds of your audience]*



CONGREGATION IDENTITY DESIGN | UPDATEABLE WEBSITES  
MEMORIA DIGITAL ARCHIVES | CAPITAL CAMPAIGNS | VOCATION MARKETING PIECES

*We design identities for congregations. We also design campaigns. Many of these pieces win awards.  
But none of that matters. What matters to you is a beautiful and effective message.*

**ZUZUGROUP**  
BRANDING & DESIGN

Call ZUZUGroup today and find out how your next project  
can live up to your greatest hopes and dreams. Beautiful. Effective.

religiousidentities.com  
zuzugroup.com  
1.888.Z.BRAND.U