Mission Priority Examen:
A Mechanism for Self-Study, Peer Review, and Assessment

[Text in BOLD denotes the approved Examen Mechanism. The National Coordinating Committee’s supplementary guidelines appear in standard typeface]

1. The Superior General of the Society of Jesus asked the Jesuit Provincials of the USA and the Presidents of the Association of Jesuit Colleges and Universities (AJCU) to devise a comprehensive process that would protect, strengthen, and promote the mission of the Society of Jesus at the institutions of higher education the Society conducts in the United States. In response to his request, the Provincials and Presidents established a self-study and peer review process for assuring the Catholic and Jesuit identity at the members of the AJCU.

2. In consultation with the Presidents, the Provincials appointed a Coordinating Committee with responsibility for establishing the protocols for a self-study process based on the document Some Characteristics of Jesuit Colleges and Universities: A Self-evaluation Instrument, which the Provincials and the Presidents developed and approved.

Resources
The Coordinating Committee has developed flexible guidelines for implementing the Mechanism. Introductory portions of the guidelines are included in this document, and discussed in greater detail on the Mission Priority Examen (MPE) website:

ajcunet.edu/missionexamen.

Please note that all Presidents, Self-study Chairs, Self-study Committees, Peer Visitor Team, and others involved in the MPE process should view the resources on the MPE website as essential companion texts to this document.

The guidelines presented here and online are updated and improved annually, and each new revision is approved by the Provincials and the Presidents of the United States, pursuant to the recommendations of the National Coordinating Committee. The MPE process will continue to be refined until the initial, five-year experiment concludes in spring, 2020. At that time, all schools will have participated in the first round, and a general review of the process will be undertaken.
Self-study Chairs
The MPE process of a given campus is coordinated by a Self-study Chair, who is selected by the school’s president. The Chair’s responsibilities are discussed on the MPE website.

Deadlines for Submission of Materials
Self-study Chairs should note that, for Examens conducted during AY 2018-2019, two deadlines are paramount:

Sunday, October 1, 2018
The school’s proposed MPE calendar, and an outline of their process, is due to the President of the AJCU and National Coordinating Committee. Email the calendar and outline to: examen@ajcunet.edu.

Sunday, April 8, 2019*
The MPE process must be completed, and all materials submitted to the President of the AJCU and National Coordinating Committee, including:

- Self-Study Executive Summary (final),
- Self-Study Report (final),
- Peer Visitor Report (final), and
- Letter from the Local (Arch)Bishop, if applicable.

Email materials to examen@ajcunet.edu.

3. Using the Characteristics document and questions formulated by the National Coordinating Committee, the self-study identifies the strengths and weaknesses of the institution’s mission effectiveness, evaluates its current mission priorities, and determines appropriate goals for improvement. The self-study process will seek input from a variety of stakeholders, including the local Bishop.

Further information on the focus and parameters for the self-study can be found on the MPE website.

Including the Local (Arch)Bishop
The National Coordinating Committee asked Bishop George Murry, S.J., the chair of the Higher Education Working Group for the U.S. Bishops’ Committee on Catholic Education, to alert the bishops of the United States about the general MPE process that the Society of Jesus is following. He did so during the 2016-2017 academic year.

There are multiple options for seeking the opinion of the local (Arch)Bishop:

- The president meets in-person with the (Arch)Bishop, to chat with him about the school’s service to the (arch)diocese and update him on the MPE process. Giving the (Arch)Bishop a list of the school’s current contributions to the (arch)diocese can make this a much richer discussion. Such a list might include a range of involvements, such as:  
  - discounted courses for church employees,
  - tutoring in parish schools,
  - tax preparation assistance in poor parishes,
  - staff and management training at Catholic Charities,
the provision of liturgical music by pastoral ministers or “Sunday supply” service by Jesuits, etc.

In light of what the school shares about its contributions, the President then may ask the (Arch)Bishop, “With which additional needs of the (arch)diocese might the university assist?” and/or “What might help the school foster Catholic/Jesuit identity and mission?”

- If schedules or other circumstances truly preclude a meeting between the President and the (Arch)Bishop, the Provincial may be able to chat with the (Arch)Bishop when the Provincial makes his annual visit to the college or university. This is not ideal, since strengthening direct communication between the President and (Arch)Bishop is a desirable outcome of the process. However, the Provincial may serve as an MPE conversation partner for the (Arch)Bishop when the situation requires it.

- Much less satisfactory, and therefore to be avoided if possible, some bishops may not be able to spend time with the President or provincial, but may choose to respond to a set of questions in writing. In these cases, presidents are encouraged to send the (Arch)Bishop a note of thanks, indicating that his suggestions will be incorporated into the self-study.

However the (Arch)Bishop is consulted, the National Coordinating Committee strongly recommends that his input be sought early in the self-study phase, so that his opinions can be considered and incorporated appropriately.

4. A Visiting Team, appointed and oriented by the Coordinating Committee, reviews the self-study report, visits the campus, and interviews representative stakeholders to assess the validity of the self-study. The Visiting Team includes its observations and recommendations in a written Peer Review Report.

Detailed information on (a) the selection and role of the Peer Visitor Team, and (b) the Peer Visitor Report can be found on the MPE website. Peer Visitor Teams are asked to use the template provided on the website for their report. The Peer Visitor Report mirrors the Self-Study Executive Summary, to provide continuity and ease of reading for Father General.

a. The Visiting Team presents the Peer Review Report to the host institution, which will have the opportunity to amend its priorities in light of the committee’s recommendations, as well as to correct factual errors or express objections.

- The Peer Visitor Report is presented first in draft form to the school, so the institution can correct factual errors, state objections, or amend priorities.
- The school’s Self-study Committee decides – in conversation with the President and others s/he deems appropriate – whether to accept the Peer Visitors’ draft recommendations.
- The Self-study Committee then prepares final versions of the self-study and executive summary, submitting both his to the National Coordinating Committee and Peer Visitors.
- As the "Director of the Work" (i.e., head of a Jesuit-sponsored ministry) the President sends a letter to Father General, accepting the priorities recommended in the Self-study and indicating how the Board’s commitment has been obtained.
- The Peer Visitors prepare a final Peer Visitor Report, reporting on their visit and indicating whether the Peer Team significantly disagree with the school’s choice of Jesuit Mission
Priorities. The Chair of the Peer Visitor Team sends this final report to the National Coordinating committee and Self-study Committee.

b. The Visiting Team presents the final Peer Review Report to the [National] Coordinating Committee, which sends the report to the Provincial where the institution is located, the President of the Jesuit Conference of Provincials, and the President of the AJCU.

The School’s [amended] self-study and executive summary, along with the final Peer Visitor Team Report, are sent by the National Coordinating committee to the Provincial, the President of the Jesuit Conference, and the President of the AJCU. This is completed six weeks prior to the spring meeting of the provincials, so that all the reaffirmations for that academic year can be addressed by the Provincials and sent to Father General at roughly the same time.

*The Provincials’ spring, 2019 meeting begins on Sunday, May 20, so all the materials mentioned above are due to the National Coordinating Committee by Sunday, April 8, 2019.*

- The Provincial provides feedback to the President of the school after receiving the school’s Mission Priorities. The President of the school may wish to make changes in the priorities, in light of this feedback.

\[\text{c. The Provincial and the President of the Jesuit Conference will review the Peer Review Report through their usual mechanisms of consultation.} \]

In practice, the Provincials compare notes on the current year’s schools at their late spring meeting.

5. After the local Provincial completes his review and assessment, he sends the Peer Review Report and his own observations and recommendations to Father General. After the President of the Jesuit Conference completes his review and assessment, he sends his observations and recommendations to Father General.

The Provincial sends his letter to Father General, along with final versions of all reports. The President of the Jesuit Conference also completes his review and assessment in light of the Provincials’ discussion. The President of the Jesuit Conference sends his observations and recommendations to Father General separately.

6. Father General reviews the Peer Review Report and the observations and recommendations of the Provincial and President of the Conference.

a. As the ecclesiastical authority competent to confirm the Catholic and Jesuit identity of the institution, Father General communicates his assessment to the local Provincial.

b. The local Provincial informs the institution, the local Ordinary, the President of the Jesuit Conference, and the President of the AJCU what Father General has decided.

The local Provincial’s letter also goes to the institution’s board chair and president. As circumstances dictate, the Provincial and school President may wish to continue conversations about issues the Reaffirmation process has raised.
The letter from the local Provincial (in 6.b) is for public use.

Each school’s internal audit of progress on its Jesuit Mission Priorities can be a very brief letter sent through the president to the appropriate Board Committee or some such device. The annual visit of the Assistant Provincial for Higher Education for the Province may be a helpful part of the follow-up process. Meanwhile, the president will continue regular outreach to the (Arch)Bishop, perhaps assisted by the Provincial’s annual visit to the Ordinary.

7. The President of the AJCU writes an annual report to Father General based on the Peer Review Reports received during that year, analyzing the findings and general conclusions. Father General sends this report to the Congregation for Catholic Education (CCE) and the Congregation for Institutes of Consecrated Life and Societies of Apostolic Life (CICLSAL) with his own observations.

About a month after sending final reports to the AJCU, the Self-study Chair at each school is invited to send to the President of the AJCU a brief written reflection sketching the process used, any problems, and ideas for how the reaffirmation might have been done better or more simply.

In preparing his annual report, the President of the AJCU consults with the coordinating Committee. The AJCU President’s sends his annual report to Father General, to assist him in his review by discussing how the MPE process has gone, overall. Therefore, the AJCU President does not wait to offer input until Father General has completed his own annual review.

8. At the end of a five-year cycle [spring-summer, 2020], the President of the AJCU writes a synthetic overview of the results of the institutional reviews. The overview emphasizes the overall conditions of mission and identity, and it recommends any needed actions. Father General presents this report to the CCE and the CICLSAL with his own observations.

9. After five years, representatives of the AJCU, the Society of Jesus, the CCE and the CICLSAL (as determined by Father General and the prefects of the Congregations) will review the ad experimentum experience to make recommendations for any needed revisions. This review will include examination of the document, Some Characteristics of Jesuit Colleges and Universities: A Self-evaluation Instrument, to ensure that an ongoing process of continual improvement can continue.