

Synod on Synodality: A Sociological Analysis of its Participatory Methodology

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Abstract

The volume, speed, and intensity of change taking place across all segments of society and the problems associated with them prompted Pope Francis, as the leader of the Catholic Church in the world, to search for ways of positioning the Church in order that it would be able to respond adequately to both existing and emerging challenges to the Church's mission of evangelization. To this end, the Holy Father convoked the Synod commonly called the Synod on Synodality in order that the members of the Church – laity, religious, and clergy – may dialogue, discern and find common pastoral solutions to these problems. However, the methodology of the Synod was atypical. Rather than resorting mainly to the members of the clergy and to subject experts for solutions, the methodology of the Synod lays emphasis on gathering information from the lived experiences of the faithful, especially the laity. This approach is similar to the Participatory Action Research in the Social Sciences. This paper highlights the similarities between the methodology of the Synod on Synodality and the Participatory Action Research approach and argues for the need to deploy more social science research approaches in the processes of decision making in pastoral ministry. It also argues that pastors of souls must take into consideration the impact of social structures on the faith experience of the faithful. Without undermining the transcendental and individual dimensions of the gospel message, the paper calls for a greater appreciation of its human and social implications. As a way of improving an understanding of the impact of social structures on the faith experience of the faithful, the paper calls for the inclusion of a curriculum on pastoral sociology in the formation of pastoral agents.

Introduction

On 9-10th October 2021, Pope Francis opened a two-year synod process titled "For a Synodal Church: Communion, Participation, and Mission", commonly called the 'Synod on Synodality.' It is the fourth Synod of Pope Francis' pontificate, after the Synod on the Family in 2015 (Pope Francis 2016), on young people in 2018 (Pope Francis 2018), and the Special

Synod on the Amazon (Pope Francis 2020). The idea of holding a Synod on how the faithful, especially the laity, views its participation in the Church was initially not well received by some members of the Church; both lay and cleric, who felt there was a seeming indictment on the hierarchy. However, as discussions on the preparatory document to the Synod evolved, the intention of the Holy Father became clearer. His overarching intention is to remind the Church of its nature as a community of believers whose members have an active voice in the planning and execution of the mission of the Church as a sacrament of salvation. However, the methodology of the Synod was atypical as it deviated in several ways from previous synodal procedures and methodology. First, it is longer than most of the recent synods, as the period from the opening of the Synod to the final deliberations in Rome spans two years (October 2021 to October 2023). Second, rather than the typical top-down approach whereby senior members of the ecclesiastical hierarchy and subject experts (*peritus*) discuss and proffer solutions on behalf of the entire Church, albeit local ordinaries are also deeply involved, the Synod on Synodality takes a bottom-up approach with emphasis on listening to and gathering information from the lived experiences of ordinary Catholics around the world. The thrust of this approach is to emphasize participation as a core element of the Church's nature. Moreover, the early Christian Church was characterized by an inclusive and communal lifestyle that encouraged a participatory decision-making method and mission. Another important aspect of this Synod is that it was not convoked to define or clarify doctrines but to understand how the Church, both as an institution and as a community of believers, can respond to the changes the world is experiencing in the current epoch of change. As such, the principal issues around which the synodal conversations are held are more social than doctrinal (Preparatory Document 2021; *Vademecum* 2021).

First, this paper seeks to underscore the importance of an adequate understanding of social, cultural, and structural issues within the context of globalization and rapid social change in the formulation of pastoral policies and their implementation strategies. Second, it highlights the similarity between the Synod's methodology, particularly its data collection method, and the Participatory Action Research (also called PAR) design in the social sciences. Third, it seeks to create a dialogue between the social sciences, social research in particular, and pastoral ministry. The paper dwells on the methodology of the Synod. It highlights how social research can aid pastoral ministry, especially concerning comprehending pastoral problems and quotidian decision-making. To this end, the paper is divided into five parts. First, we present the context in which the Synod was convoked. In the second part, paper presents the methodology of the Synod while bringing to the fore its emphasis on participation. The third part of the paper discusses the participatory research design while the fourth part seeks to establish a nexus between social research and effective pastoral ministry. The final part consists of the conclusion drawn from the entire discourse.

Context of the Synod

Pope Francis convoked this Synod at a time in which he, on different occasions, described the Church to be living in not only an era of epochal change but a change of epoch. This description of events in the contemporary world can hardly be contested, as even people in the business world have described the present era as one of unprecedented change (Morgan 2020). This fast pace of change is not only a matter of concern for individuals whose living conditions are increasingly deteriorating, leaving them more exposed and vulnerable. It is also a source of anxiety for leaders as they find it increasingly more challenging to make long-term decisions. Morgan argues that the pace at which change occurs is one of the biggest challenges to future leaders worldwide (Morgan 45). It is in this wise that the Roman Pontiff, as the leader of the Catholic Church worldwide, felt the need to call for a period of listening, dialogue, and discernment in the Church in order to find adequate responses to the significant challenges confronting the world and, invariably, the Church's mission of evangelization. Pope Francis' reflections and discussions on the state of the world and their impact on the Church are done within the context of globalization. However, we discuss the impact of globalization on three areas that the Holy Father has given much attention to in his pontificate. These are migration, work, and the weak, as exemplified in his attention to the elderly and concern about the impact of SARS COV-19, commonly referred to as the COVID-19 pandemic, on society and violent conflicts.

Globalization has been a significant driver of events in the world and, consequently, of the changes the world is experiencing (Waters 2001; Sassen 2007). Globalization has a lot of positive aspects. For example, it has reduced the perception of time and space by facilitating more extraordinary encounters between people of different cultures, driving global interconnectedness and interdependence, enhancing an easy flow of capital and information, etc. However, it has also exacerbated existing social problems and created new ones. Suffice it to say that most of the problems the Holy Father invites the faithful to reflect on already exist in society. However, the phenomenon of globalization increased the scope, speed, and intensity at which they occur while making it more difficult for them to be managed. Cheaper and faster means of transportation, especially air travel, have made the movement of people more accessible. However, it has also triggered an unprecedented wave of human migration, not to mention the impact of increased ownership and use of fossil fuel-based means transportation on planet earth (Pope Francis 2015). One of the most divisive issues in the politics of Western countries is the management of migration. Nation-states are finding it difficult to control an increased flow of immigrants into societies already struggling with inadequate and crumbling infrastructure, rising unemployment, a cost-of-living crisis, diminishing social welfare benefits, and a general fall in the standard of living. All these contribute to the charged political debates around migration being witnessed across the globe that sometimes degenerate into racism and xenophobia.

Another area where globalization has had a significant impact is in the area of work. On the positive side, globalization has created new forms of work that make it easier for people to work remotely, freed up more time for leisure, and enhanced family-work relations, etcetera. However, the changing nature of work has also exhibited an Achilles hill, as can be seen in increasing job precariousness, out-sourcing and off-shoring of badly needed domestic jobs, weakening labour unions and laws protecting workers, reducing the price of labour and enabling the exploitation of workers, mainly migrant workers. The world is increasingly undergoing a labour crisis on a global scale, and countries are struggling to cope with unemployment as well as the changing nature of work. Globalization has exacerbated the divide between skilled and unskilled workers and deepened the phenomenon of the working poor; these people do multiple jobs but cannot meet their basic needs (Wilson 2004).

Conflicts, even violent ones, have been part of social processes (Coser 1956). However, despite a significant decline in inter-state conflicts, secessionist agitations, civil wars, and other socio-political instability is increasing within countries. Almost all the countries of the world experience threats to social order in one form or the other. The seeming ubiquity of violent conflicts has led Pope Francis to describe the state of violent conflicts as “Third World War fought piecemeal”. The Holy Father has made this statement in several speeches but, more recently, concerning the War between Russia and Ukraine (Merlo 2022). Today, conflict entrepreneurs, terrorist groups, and other state and non-state actors that seek to undermine social peace take advantage of the opportunities provided by the forces of globalization to wreak havoc on societies. It is unsurprising that both the guiding documents of the Synod mention violent conflicts as a critical issue to be discussed during the synodal consultations (Preparatory Document 2021; *Vademecum* 2021).

Besides migration and dwindling economic fortunes, climate change has also affected domestic conflicts worldwide. Climate change is said to be one of the greatest threats to human civilization and global peace. While dedicating an entire encyclical to the care of the earth (Pope Francis 2015), Pope Francis not only laments the human causes of climate change but also makes connections between climate change and the recent phenomena of migration, poverty, inequality, and conflict.

As the world was still battling with these and other issues, a global health crisis arose with the outbreak of COVID-19. This public health problem was first identified in China, but it quickly spread at an alarming rate to other parts of the world, leading to a near-total shutdown of the global economy. COVID-19 revealed how interconnected and interdependent the world has become and exposed how isolated, selfish, inward-looking, and myopic many governments and their people have become. The initial responses of world leaders to the pandemic were characterized by selfishness and protectionism, as exemplified in policies of vaccine nationalism embarked upon, especially by Western developed countries that have both the know-how to develop the

vaccine and the resources to buy them. This attitude contrasted with Pope Francis' call for global cooperation and solidarity in confronting the disease because "we are all in the same boat" (Pope Francis 2020 no 30), and no one can be saved alone.

It is in the face of these challenges, amongst others, that the Roman Pontiff invited the people of the world, especially Catholics, to listen to each other and to begin a process of constructive dialogue and collective discernment in order to formulate adequate responses to the challenges the Church and the world face. The motivation of the Holy Father to invite Catholics to this period of discernment may not be far from his belief that "we are in the same boat". As such, either the world works together and survives the storm, or people continue to tread the path of selfishness and eventually perish. For Catholics, the Synod on Synodality is meant to encourage them to journey together in finding solutions to shared problems, primarily as they affect the mission of the Church. However, this process of walking together is guided by some methodology.

Methodology of the Synod on Synodality

The consultation stages of the Synod aimed to ensure the faithful's maximum participation in the deliberations. In order to achieve this goal, the methodology takes a bottom-up approach with emphasis on the lived experiences of the laity, especially those on the margins of society (Preparatory Document 2021; *Vademecum* 2021) rather than the knowledge of experts and the opinions of the ecclesiastical hierarchy. It also makes it clear that the principal role of the contact person or Synod coordinator at the various stages of the consultation (local, national, continental) is to elicit discussions and guide the faithful, especially the non-members of the ecclesiastical hierarchy, to discuss freely, frankly, and constructively in order to find solutions to the problems they have identified and discussed (*Vademecum* 2021). The Synod's preparatory document emphasizes dialogue and collaboration as groups or communities in discerning the way forward for the Church as it seeks solutions to common problems. As such, the methodology of the Synod prioritizes community-based solutions over individual opinions, no matter the technical expertise of the opinion maker. However, the ability to collaborate with others not only strengthens community bonding but also ensures communal ownership of the decision and their implementation.

The methodology of the Synod is deeply qualitative, and case-study based as it emphasizes the experience of each parish community. The case study approach has many advantages, especially concerning the depth and richness of data collected (Denscombe 2014; Yin 2014). However, its major downside is that data obtained through case studies cannot be generalized. Nevertheless, rather than generalizability, the synodal consultations seek to achieve the comparability of experiences. Moreover, the Synod's multi-sited case studies approach involving all the parishes and local communities of Catholics worldwide is an attempt to increase the reliability of the data from

which conclusions would be drawn. Hence, the Synod's goal of comparing experiences at the different phases of the synodal consultations (diocesan, national, and continental) is an essential build-up to the meeting in Rome in October 2023, where conclusions will be made on the issues raised at the preceding phases.

Another meaningful way the Synod's organizers aim to increase the reliability of data obtained during the consultations is by collecting data from multiple sources, otherwise known as triangulation (Denzin 1978; Patton 1990). Triangulating data from multiple sources can increase the data's richness, scope, and reliability. The *Vademecum* strongly encourages the organizers of the synodal consultations and their participants to adopt all necessary methods, such as conferences, interviews, questionnaires, group discussions, online methods, etc., in collecting information during the consultations. The use of multiple data sources helps in comparing opinions and distilling ideas. Regardless of the solid qualitative orientation of the synodal consultation processes, it is worth noting that quantitative data collection methods such as a survey questionnaire can also be used for data collection in case studies. It is also instructive that the *Vademecum* encourages its organizers to explore ways of consulting groups outside the Catholic Church, such as schools, universities, research centers, other Christian groups, non-Christian groups, etc., and factoring in their opinions in the synodal deliberations. It might appear strange that the Roman Pontiff seeks the opinions of individuals and groups outside the Catholic Church to make pastoral decisions. However, the overall goal of the Holy Father in calling for the Synod makes it essential for all possible shades of opinions to be heard in order to arrive at a comprehensive decision.

The Synod's adoption of a multi-level consultation strategy (local, national, continental) is essential for distilling ideas, understanding local and regional differences or peculiarities, and promoting the principle of subsidiarity whereby the different levels of an institutional organization are given room to attend to issues that are within their jurisdiction and competence. Such an approach also engenders local ownership of decisions and their implementation.

By and large, the methodology of the Synod on Synodality has a lot in common with the Participatory Action Research approach of the social sciences.

Participatory Action Research

Participatory Action Research (PAR), also called Participatory Research or Action Research, came into being in the 1940s (Noffke & Somekh 89). It is a process in which a group documents and analyses their collective experience of a social problem, placing it in the broader context of social, economic, and political causes and effects as well as integrating knowledge from outside the limits of their direct experience (Bernard 167). It is a research design used for a wide range of research aimed at community development,

organizational development, social change, and general forms of problem-solving that involve groups and organizations. PAR is used both for problem-solving and project development.

A significant characteristic of participatory research is the treatment of the group being researched as an active subject in the research; it treats participants as equal partners or co-researchers who have an active voice in the process, conclusions reached, and the implementation of resolutions. The researcher acts more as an animator, facilitator, or motivator whose principal role is to create a suitable condition for the active participation of the researched in discussing the problem and suggesting solutions (Bernard 174). It is a collaborative research process in which the research participants collaborate in the collection and analysis of data, decision-making, and implementation. Dialogue is therefore essential in participatory research and it is the responsibility of the researcher (facilitator) to create an atmosphere that allows for open and frank discussions. In pursuance of this goal, participatory research also seeks to contain the influence of power differentials in discussions. As such, the animator must ensure that no voice is silenced in the group due to power differentials. Facilitators must seek not only to minimize power inequities but also make deliberate efforts to amplify the voices of the marginalized. Consequently, participatory research is a critical and reflective inquiry process that holds hope for the marginalized; it gives voice to those who are usually silenced and empowers people to analyze their experiences to effect change (Bernard 167).

Another vital characteristic of PAR is that it emphasizes the insider (participants) or emic perspective more than the outsider (researcher) or etic perspective. Although expert opinions are not rejected entirely, their influence on the research process is deliberately contained. PAR adopts a bottom-up rather than top-down approach.

Other characteristics of participatory research include that it is localized and small-scale. As such, it is case-study based even though it can involve multiple case studies when decisions to be made extend to multiple groups and there is a need to compare cases. The research can also be carried out at multiple levels of social and institutional organization. Participatory research could involve multiple methodologies, such as the combination of quantitative and qualitative data collection methods, such as survey questionnaires, interviews, focus group discussions, content analysis, etc. (Bernard 170). Participatory research is reflexive and cyclical rather than linear (Denscombe 124-125).

One of the objectives of this paper is to initiate a dialogue between social science and pastoral ministry. We will now discuss this relationship in the next section.

Towards Collaboration between Social Research and Pastoral Ministry

From the foregoing, it is evident that even without stating it explicitly, the design of the consultation stages of the Synod is an attempt to employ the

methodologies of the social sciences in the processes of decision-making in pastoral matters. Although there have been attempts to engage the social sciences in pastoral ministry, these efforts have instead been dominated by psychology (Ballano 532). Studies in pastoral psychology and clinical psychology are already an intrinsic part of the training curricula of the Catholic clergy. On the contrary, other fields of the social sciences, especially sociology, are still viewed with suspicion by the ecclesiastical hierarchy. This skeptical approach to sociology is not unconnected with the issues around its emergence as an academic discipline. Having emerged in the 19th century alongside the rise of modernization, secularism, agnosticism, and the critical study of religion, the Church saw it as a harbinger of secularism and atheism. Despite the Second Vatican Council's attempt to change this perception by seeking to collaborate with secular disciplines, especially the social sciences, in finding solutions to the pain and anguish of people in the world (Pope Paul VI 1965), the relationship between pastoral ministry and the social sciences has largely remained undeveloped, except for psychology, as noted earlier. However, the major limitation of psychology is its focus on the individual and its inability to appreciate the impact of socio-cultural, economic, and structural factors on the presentation and reception of the gospel message. Psychology's emphasis on the individual might be what has endeared it to the Church's hierarchy. However, it is instructive that the Synod's preparatory documents emphasized the impact of macro-structural issues on the effectiveness of Christian evangelization. As such, more should be done to enhance a deeper understanding of the social dimension of the Christian life, as this knowledge will aid decision-making concerning pastoral ministry. For this reason, sociology and social research must be included in developing a robust, practical theology.

Sociology shares at least two things in common with the salvific mission of the Church. First, both sociology and Christian Church are concerned with the human being. While the Church's ultimate goal is the salvation of the human being, sociology's primary concern is the well-being of the person in society. Second, the Church and sociology are concerned with promoting a just and fair society. While the Christian Church couches it in the language of establishing the kingdom of God on earth, sociology views it as attaining order and harmony in society. The challenge, however, has been the inability of some theologians and members of the Church's hierarchy to adequately appreciate the empirical dimension of the Church's mission and the need for a deeper engagement with the social sciences in both theory and research as a way of evolving a holistic pastoral ministry. Some of the reasons that could be adduced for the incomprehension on the part of the Church's hierarchy include the over-emphasis on the transcendental and invisible dimension of the Church's theology, which is not unconnected with the abstract and theoretical nature of priestly formation as evidenced in the nature of philosophy and theology, the two core subject areas of the intellectual formation of Catholic priests (Ballano 2020).

Since pastoral ministry is practical and seeks to respond to the challenges of the faithful in their socio-cultural, economic, and political conditions, pastors should view the social sciences as close allies. Moreover, in seeking to enculturate the gospel in different socio-cultural contexts, a deep understanding of the culture, worldview, and social behaviours of the targets of evangelization cannot be overemphasized. Hence, not only is an adequate preparation in sociology and anthropology indispensable for missionaries, a basic knowledge of the methodologies of social research is necessary for pastoral planning and implementation. An openness to employing social research tools is essential for understanding pastoral problems and decision-making. This is precisely what the methodology of the Synod on Synodality sets out to do, albeit without the rigor of well-designed social research.

Based on the issues discussed above, ideas drawn from sociology and social research, in general, can be of immense benefit to pastoral ministry. As such, it is necessary to pursue the development of effective collaboration between theology and social research in order to bridge the gap between the transcendental and the empirical dimensions of the Christian mission. This goal can be achieved by employing the services of sociologists and social scientists, by training Catholic clergy in the social sciences, and by accepting and promoting the emerging interdisciplinary sub-field of pastoral sociology in the same way pastoral psychology has been accepted and has become an integral part of the formation of the Catholic clergy.

Conclusion

From the foregoing, it is evident that the Holy Father considers social, cultural, political, economic, and environmental issues in the broader context of globalization as key to how the gospel is presented and how people receive it. It is also instructive that the organizers of the Synod adopted a methodology that is characteristic of the social sciences in order to investigate the issues raised. Nevertheless, the Synod on Synodality is a unique opportunity for the Church to reflect on the challenges of mission in the contemporary world, an epoch of epochal change. While it is fair to argue that the challenges identified in the broad themes suggested in the Synod's working document as areas for consultations are not entirely new to human experience, the speed and intensity with which they occur, as well as the complexity they demonstrate, are pretty new and defy old solutions. In acknowledging this fact, Pope Francis convoked the Synod and even adopted a methodology not used in previous Synods, which is essentially participant-oriented. Rather than a consultation skewed in favour of the views of the ecclesiastical hierarchy and subject experts, the methodology of the Synod is essentially a bottom-up process that emphasizes the lived experience of the laity in their various parish communities and social conditions.

This methodological approach is similar to the Participatory Action Research design in the social sciences, whereby the research participants become the central protagonists of the process. At the same time, the expert

researcher acts only as a facilitator to help them identify and discuss the issues and proffer solutions. Although the Synodal consultation process did not strictly follow the steps involved in PAR, the similarity of its methodology with PAR forms a basis for further discussions on how social science research methods can aid decision-making in the pastoral field. This paper highlighted this relationship and made a case for closer collaboration between the social sciences - sociology and social research - and pastoral ministry. The methodology of the Synod on Synodality is an example of how evidence gathered from well-designed social research can aid pastoral planning and decision-making in the pastoral field. Regrettably, the tension between Catholic theologians and hierarchy and the social sciences persists, no thanks to the historical suspicion of the social sciences by some members of the Church's hierarchy, an over-emphasis on the transcendental and invisible dimension of the Church at the detriment of its human and social dimension as well as the imbalance between the overly abstract and conceptual nature of priestly formation and the empirical dimension of pastoral ministry. Nevertheless, it is crucial that pastoral workers, especially those in mid-level and executive leadership positions, are exposed to the rudiments of social research to enrich their decision-making processes.

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