Wisconsin Religious Collaborative
A Project of LCWR Region 9

Executive Summaries of Articles and Videos Related to the WRC Project

*These summaries were commissioned by the WRC Working Group to provide background information for the Project. They were compiled by several different researchers in June - July, 2016.*

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<table>
<thead>
<tr>
<th>CONTENTS</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction: “Central Themes in the Articles and DVDs from the Executive Summaries” by Maureen Gallagher</td>
<td>1</td>
</tr>
<tr>
<td>1. “Planning for the Future: Three Perspectives” by Patrick Croke, Hertha Longo CSA, &amp; Dan Ward OSB</td>
<td>2</td>
</tr>
<tr>
<td>3. “Covenant Relationships: Having the Conversation” by Joy Connealy ND, Carole Shinnick SSND, &amp; Dan Ward OSB</td>
<td>4</td>
</tr>
<tr>
<td>6. “Governance of a Religious Institute” by Lynn Jarrell OSU &amp; Nancy Reynolds SP</td>
<td>7</td>
</tr>
<tr>
<td>7. “Weighing the Common Good: Choices for the Future by a Religious Institute and Its Members” by Lynn Jarrell OSU &amp; Nancy Reynolds SP</td>
<td>7</td>
</tr>
<tr>
<td>10. “Leading Today to Sustain Tomorrow: What and Whom Are We Leading?” by Erin George &amp; Carol Zinn SSJ</td>
<td>10</td>
</tr>
<tr>
<td>11. “Well Done, Good and Faithful Servants: Moving Toward Completion” by Sandy Schwartz FSM</td>
<td>11</td>
</tr>
<tr>
<td>12. “Choosing to Be Pro-Active About the Future: The Reality of Ecclesiastical Intervention in a Religious Institute In Diminishment” by Lynn Jarrell OSU &amp; Nancy Reynolds SP</td>
<td>11</td>
</tr>
<tr>
<td>13. “Covenant Relationship” by Dan Ward OSB</td>
<td>13</td>
</tr>
<tr>
<td>15. “Statistics on Ages and Numbers of Members of U.S. Religious Institutes” by Donna Miller &amp; NRRO</td>
<td>15</td>
</tr>
<tr>
<td>16. “Diminishing Human Resources for Leadership in Religious Institutes: A Canonical Reflection about the Situation in the Netherlands” and “Questionnaire Accompanying Article” by Myriam Wijlens</td>
<td>15</td>
</tr>
<tr>
<td>17. “Providing Leadership in Aging Provinces: A Challenge to General Councils” by Myriam Wijlens</td>
<td>16</td>
</tr>
<tr>
<td>19. “Update on Canadian PJP Project” by Donna Miller</td>
<td>18</td>
</tr>
<tr>
<td>20. “Practical Guidelines for Aging Institutes” by Amy Hereford CSJ</td>
<td>19</td>
</tr>
<tr>
<td>22. “Rising from the Ashes: Appreciating and Fostering Post-Death Organizing” by Jean M. Bartunek RSCJ &amp; Ian J. Walsh</td>
<td>21</td>
</tr>
<tr>
<td>23. “Religious Life: Yesterday, Today and Tomorrow” by Carol Zinn SSJ</td>
<td>22</td>
</tr>
<tr>
<td>24. “How Legacies May Be Preserved and, Indeed, Resurrected” by Jean Bartunek RSCJ</td>
<td>23</td>
</tr>
<tr>
<td>25. “Leaders for the Journey” by Sharon Holland IHM</td>
<td>23</td>
</tr>
<tr>
<td>26. “Collaborative Governance Project” by Kelly Connors PM &amp; Rose Dowling FSM</td>
<td>24</td>
</tr>
</tbody>
</table>
**INTRODUCTION**

"CENTRAL THEMES IN THE ARTICLES AND DVDS FROM THE EXECUTIVE SUMMARIES" BY MAUREEN GALLAGHER

Maureen Gallagher is a partner with The Reid Group and serves as a consultant and facilitator for the Wisconsin Religious Collaborative Working Group.

While many of the articles and DVDs summarized here integrate various themes, some of the main ones that surfaced in the material as a body include those listed below. The themes themselves are not discrete. For instance, there is overlap between transitions and mission, governance and completion, transitions and completion, etc. Some of the articles and DVDs had various models embedded in them. Others focused on the Covenant Model or the PJP in Canada.

Four threads ran through much of the material:

- The need for planning—the earlier the better.
- The complexity of moving forward with fewer members and the flexibility available to make needed transitions.
- The need to partner with members of other institutes and lay people.
- The need to separate out management from leadership and free leaders to focus on pastoral care issues, mission and charism and in general care of the sisters.

Following is a list of topics and the summaries that deal with them, indicated here by first author listed and summary number.

**WORKING MODELS WITH A TRACK RECORD**

Covenant relationships: excellent descriptions of all that it takes to form a Covenant Relationship (Croke 1, Connelay 2, Connelay 3, Schwartz 11, Ward 13).

Canadian PJP: good expose of what is being done in Canada (Morrisey 18, Miller 19).

**GOVERNANCE AND LEADERSHIP**

Focus on the Big Picture (Holland 25).

Sponsorship, elderly, transition leadership to non-members: practical guidelines canonical and civil (Hereford 9).

Providing Leadership in Aging Provinces: see questionnaire at the end of Wijlens’ article for a guide; detailed focus of what happens in European communities (Wijlens 16).

Need to be proactive: scenarios of different types of communities presented; emphasis on planning (Jarrell).

Leadership in aging provinces: points to options and flexibility in dealing with the diminishing number of younger members to provide leadership; practical suggestions – outside help, suppression, mergers, primarily referencing European communities, but applicable beyond Europe in many cases (Wijlens 17).

Governance of a religious institute: canonical and legal information for internal restructuring (Jarrell 6).

Shared governance between two different institutes – Collaborative Governance Project (CGP): practical, ensures autonomy and decision making capacities of participating institutes (Connors 26).

**TRANSITIONS**

Viability continuum: relationships key, internal and external; a more recent viability index would be helpful; current one is from 2000 (Bader 8).

Resources from LCWR, RCRI, NRRO: “Embracing a New Critical Juncture, Parts 1 & 2,” has many examples; emphasis on planning, communication, and transparency (Bader 4 & 5).

"Post-death" organizing: engaging individuals, refraining negatives into opportunities, value relationships, build confidence and capacity, ideas from the corporate world can be adapted to transitions in communal life (Bartunek 22).
Grief and loss in transitions: Kubler-Ross, John Bowlby stages (Mattes 21).

Aging members: goals of NRRO to assist with fundraising, planning, education, and helpful tools (Miller 15).

“Leading Today to Sustain Tomorrow”: planning for the future of mission and charism vs. operational issues, which others can do (George 10).

**COMPLETION**

Legacy (relationships, artifacts, culture, values, and charism): practical (Bartunek 24).

Focus on mission – faithful to God’s call: relationships, rituals, planning (Schwartz: 11).

“Leaders for the Journey” could be relevant under the topics of mission or governance (Holland 25)

“Explorations on the ‘Completion’ of Religious Institutes,” first section, “Art of Dying,” reflects examples from Holland (25); second section is related to dying and governance; questionnaire at the end could be helpful (Leys 14).

**MISSION & CHARISM: CRITICAL DRIVING FORCES**

Mission underlies whatever is being planned for the institute—it is the motivational factor. All can contribute to mission through prayer and suffering, if not active ministry (Holland 25).

Common good as a criterion for the future: upholding spirit and charism of founders; focuses on membership and accountability (Jarrell 7).

Religious life is living and God’s work: not about ministry or church, but about our life in the world; evolution of religious life is God’s work (Zinn 23).

“Honor the past with gratitude, live the present with passion, and look to the future with hope.”

– Pope Francis (Qtd. by Carol Zinn 23)

1. **“PLANNING FOR THE FUTURE: THREE PERSPECTIVES” BY PATRICK CROKE, HERTHA LONGO CSA, & DAN WARD OSB**


   **CONCEPTUAL SUMMARY**

   DVD 1 consists of four segments with presentations covering areas that congregations need to know and address in their own communities as they face diminishment of membership and financial, legal, and managerial implications for the care of senior members and of planning for completion and/or of forming covenant relationships.

   Included in DVD-1 are the following:
   1. “Introduction and Overview,” by Dan Ward OSB
   3. “Legal Options for Mission Completion,” by Dan Ward OSB
   4. “Finance Office Involvement: One Managerial Case Study,” by Patrick Croke

   In each presentation, one senses a great urgency for congregational planning. Practical information and helpful examples are used throughout.

   **MAJOR POINTS**

   1. “Introduction and Overview”
   Dan Ward OSB, Executive Director of RCRI, sets the context as he describes the current situation religious institutes are facing as their founding mission may be nearing completion or passed on to others. The need to plan now for their future and legacy is paramount—even if the institute will continue for some years. He also stresses the importance of living to the fullest until the mission of the institute is completed.

   Hertha Longo CSA, Congregational Treasurer of the Sisters of St. Agnes, addresses mission completion from several aspects: leadership, planning, membership, and resources religious institutes need for long-range planning. Her presentation covers a full-range of topics
Wisconsin Religious Collaborative: Executive Summaries

for planning and explains clearly the financial options that must be considered. Among these are: leadership’s responsibility for long-range planning; viability of the institute, mission, and ministry; engaging competent persons in finance office for information, trends, and projections in membership; reliable data, actuarials, tools for making projections for income, expenses, investments and risks involved in financial decisions. Other areas for study and/or decision-making presented are: effects of diminishment in the pool for leadership positions in the institute, possible collaboration to fill these gaps, retirement and long-term care for senior members, use of government programs in meeting health needs of elderly members, continuing the legacy of the institute, making decisions regarding the sale of buildings and property (as a source of income), options to consider for collaboration with other institutes, questions concerning maintaining sponsored ministries of the institute.

3. “Legal Options for Mission Completion”
In this segment, Dan Ward OSB describes the governance, leadership, and management issues for entering into a covenant relationship, which he defines as “a pledge between two institutes, between an institute and a diocese, between an institute and a management organization, or with associates.” This assists in the completion of the institute’s journey, while the institute remains autonomous. In a covenant relationship, the governance of the institute is gradually transferred. Ward presents a number of options regarding how the canonical governance of the institute may evolve or be assumed; how living arrangements are made; how resources for the care of members will be assured until the last member has died. He further discusses canonical leadership as we have known it as well as others who serve as leaders within some aspect of the institute’s mission or ministries. The management agreements deal with personnel, finances, ministries, property, and care of the members. Contractual agreements handle matters related to employees, finances, investments, maintenance, facilities, and use of resources.

4. “Finance Office Involvement: One Managerial Case Study”
In this segment, Patrick Croke, Director of Finance for Sisters of St. Joseph of Carondolet, St. Paul, Minn., shares the actual story of a step-by-step process of how RCRI is assisting a small community to enter into an agreement with another community. This video outlines for the viewer all the canonical, civil, financial, corporate, and practical issues that were and continue to be a part of finalizing this agreement. Any institute doing long-range planning will find this helpful in identifying all the areas that must be considered as it plans for the future and/or completion of its mission.

PRACTICAL APPLICATIONS
This DVD is a valuable planning tool for all religious institutes today as congregations face diminishment in number of members and financial assets. Material presented is based on adherence to canonical and civil responsibilities and on actual experiences with communities that are actually in the completion process. Their experience will be of help to all religious congregations who must plan for the future or have someone else do it for them!

GREATEST VALUE? FOR WHOM?
The presenters give complete and clear information. A study guide is available with the kit. It suggests who could benefit from the presentations: leadership teams, members, personnel (especially financial), associates, donors and other publics. There are clear directions for using the material presented, including suggestions to use during the viewing for pauses, reflection, questions, and discussion, along with detailed descriptions of processes to be used with groups.

OTHER COMMENTS
The speakers are articulate and easy to listen to as they share a wealth of information. It is evident that entering into a covenant relationship will take enormous amounts of time for planning and implementation as well as a significant amount of finances and consultative help in carrying out such a process.
Wisconsin Religious Collaborative: Executive Summaries

2. “COVENANT RELATIONSHIPS: PRELUDES AND PROCESSES” BY JOY CONNEALY ND, CAROLE SHINNICK SSND, & DAN WARD OSB


CONCEPTUAL SUMMARY

All life experiences life-cycles. Today religious life is at a critical time, “a time of pruning for new growth.” Leadership has as its primary responsibility to plan for 1) leadership and 2) the transition of the role of leadership. Covenant relationships are a vehicle for dealing the changes necessary for the viability of an institute.

MAJOR POINTS

The major purpose of covenant relationships is to sustain and care for the members of the religious institute. They are a way for religious institutes to deal with future management, governance, and legacy. Explanations of each of the processes leading to a covenant were given: context, stages, false assumptions, definitions, and an example.

PRACTICAL APPLICATIONS

It seems lots of work has been done over ten years (although this was presented three years ago). Handouts provided and available in the RCRI Toolbox provide a list of the essential elements that could be used not only for those planning a covenant relationship but for anyone involved in long range planning.

GREATEST VALUE? FOR WHOM?

Leadership interested in planning for the future would have a tool.

OTHER COMMENTS

Ward believes if an institute is to have a future it is essential that it has people capable and acceptable for leadership and five or six sisters under 60 willing to give up ministry and income to be a formative community for new members.

3. “COVENANT RELATIONSHIPS: HAVING THE CONVERSATION” BY JOY CONNEALY ND, CAROLE SHINNICK SSND, & DAN WARD OSB


CONCEPTUAL SUMMARY

In Part 2, Joy Connealy ND gave a detailed account of her community’s choice of a covenant relationship. She provided an overview of the processes, players, and phases needed to face their reality and plan for the future. Joy stressed again that the steps and processes for a covenant relationship could serve as guidance in any comprehensive planning. A basic question is how are you going to govern yourself – leadership.

MAJOR POINTS

Connealy’s talk gave a detailed description of her community’s journey toward the choice of a covenant relationship rather than a merger, refounding, union, dying with dignity, or doing nothing. They thought a covenant relationship was the best way to maintain their ND identity, allow them to focus on Gospel ministry, and share their legacy. She stressed the following: naming the issues, using consultants, using facilitators to lead the conversations, and including the membership from the beginning and repeating over and over again what was going on. She provided an overview of the players: leadership, finance, consultants for finance and property, and partners in ministry, associates, donors. Other points: realize future reality—awareness, name the issues, planning cannot get lost in money or ministry, role/tasks of leadership (see nine-point list in handout for Part I), some administration given over to focus on ministry.

PRACTICAL APPLICATIONS

The two sessions of the workshop stressed the responsibility of leadership to plan for the future now. (These were done in 2013!) They outlined the processes, stages, and players used for a covenant relationship that could serve as a guide for any long range planning.
Wisconsin Religious Collaborative: Executive Summaries

GREATEST VALUE? FOR WHOM?

A guide to elements that should be considered in long range planning by anyone involved in that process.

OTHER COMMENTS

The journey discussed by Joy is a long and difficult one, but it has given positive, renewed energy for mission to her community.

4. “EMBRACING A NEW CRITICAL JUNCTURE: PART 1" BY JANICE BADER CPPS, HELEN GARVEY BVM, & PANEL


CONCEPTUAL SUMMARY

This presentation is a recording of a complete morning session, which contains several different parts. Helen Garvey BVM speaks on “Leadership Evolving: Grace, Grounded and Free.” Janice Bader CPPS presents statistics from NRRO and a talk on “Active Hope.” A panel of Marian Durken CSA, Margaret Hickey ND, and Rose Dowling FSM speak on what is/was the critical juncture at which their community arrived and how they are responding/did respond. A question and answer period followed.

MAJOR POINTS

Helen Garvey BVM

Religious communities cannot ignore the realities of the future. The truth urges us to give conscious direction to the evolution of religious life. Principles to enhance the character of leadership: (1) Satisfaction/dissatisfaction. Elimination of dissatisfaction doesn’t create satisfaction; only purpose and meaning bring satisfaction. A community needs to look at its charism for that purpose and meaning. (2) Psychological safety. Leaders need emotional strength to absorb much of the anxiety that change brings with it and the ability to be supportive to the organization through the transition phase even though the members get angry. Complex issues desire assistance from sisters, other religious institutes and organization with expertise in a field.

Janice Bader CPPS

Lack of sufficient sisters to fill the leadership positions is the key issue facing religious institutes. Leaders must look reality in the face and communicate hope to the institute. Active hope is something we do, not just have. Active hope is taking a clear view of reality and identifying what we hope in terms of direction and then taking steps to move ourselves in that direction. The steps to active hope are: gratitude, knowing our plan, seeing with new eyes, and going forth.

Marian Durken CSA

Marian’s community is a diocesan order. She gave an overview of the process they went through, which started in 2006 in discerning what they wanted to do. Over a 14-month period they discerned to stand alone together as a community.

Margaret Hickey ND

Margaret’s community is an international order. Their process began with the 2002 Trends study. They wanted to stay strong in their mission and legacy. They also wanted to maintain their identity and their relation with their generalate in Europe. They called in professionals from NRRO and RCRI. In 2011 they discerned that a covenant with another community was their best choice. They have now (2013) begun dialogue with another community.

Rose Dowling FSM

In 2001 Rose’s group decided to focus on revitalizing their community and not to focus on vocations. In 2007 they sold their motherhouse. In making any plans they began by asking themselves what would this look like or be like in ten years. They have now changed it to five years. In 2011 they set a new focus or mission for their community. The process they have gone through has brought freedom to the community and a transformation. In 2013 they are now in the process of turning over governance of their sponsored ministries.
Religious institutions must look at the realities of the future. Each institute needs to discern with and be transparent with its members as they move through the process they decide to follow. Plans will change and evolve along the way. Let go and let be.

Parts of this may be of value to different people. Not all of the video needs to be watched.

Helen Garvey’s talk begins at 8:07
Janice Bader’s talk begins at 33:21
Marian Durken’s talk begins at 1:14:47
Margaret Hickey’s talk begins at 1:28:47
Rose Dowling’s talk begins at 1:38:42
Q & A begins at 1:52:16

5. “EMBRACING A NEW CRITICAL JUNCTURE: PART 2” BY JANICE BADER CPPS, JANET MOCK CSJ, & DAN WARD OSB

LCWR Pre-Assembly Workshop, 2013. Part 2 of a two-part workshop sponsored by LCWR, RCRI, and NRRO.
Video recording. Available in RCRI Toolbox (see LCWR13).

Presenters for this session are LCWR executive director Janet Mock CSJ, RCRI executive director Dan Ward OSB, and NRRO executive director Janice Bader CPPS. They discuss what their organizations are doing to help religious institutes at this critical juncture. The presentation is followed by a question and answer period that covers areas such as what there is to assist 50 and 60 year old sisters in a community, how associates are connected with this, and vocations.

Janet Mock CSJ
LCWR’s mission is two-pronged in working with religious institutes: (1) to continue the work of today and to help institutes receive the resources available to make good (2) to nourish religious life among its members.

Dan Ward OSB
1. Expanding and Limiting Possibilities: (a) Laws should follow life. (b) Be creative and then ask if it is possible or what adjustments need to be made.
2. There are no set models for covenant relationships.
3. Two major issues religious institutes need to change their notions of are: (a) Leadership is about pastoral care not about managing the institute. Managing can be farmed out. (b) Religious members don’t all live together when they are in ministry. Therefore, change the notion that they must live together in retirement.
4. Act before it’s too late. If a religious institute cannot make decisions on its own outside intervention will happen.

Janice Bader CPPS
NRRO has services to assist religious institutes that are struggling financially. NRRO will help with planning and implementation for the institute and not just provide monetary assistance.

Question & Answers
Q. Is there something out there to assist the 50- and 60-year-olds that have no one behind them in an institute?
A. The Collaborative Leadership Program works with religious members and associates.
Q. Is there any collaboration being done between LCWR and NACAR (North American Conference of Associates and Religious)? A. LCWR only deals with leaders. Dan Ward suggests being cautious with associate programs because Rome doesn’t understand them.
Q. Is the national vocation office working with what we are discussing about the future of religious institutes?
A. A religious institute must discern if it is able to support new members in a formative community throughout the years ahead. If not, the institute should steer anyone interested to one that is still viable.
Q. What does canon law say about receiving candidates and having a formation house?
A. Religious institutes are not required to receive candidates and have a house of formation.

Religious institutes must have the courage to take steps now because it will lead to real life in their mission.
GREATEST VALUE? FOR WHOM?

There are many resources available to religious institutes through LCWR, RCRI and NRRO to assist them in many areas.

6. “GOVERNANCE OF A RELIGIOUS INSTITUTE” BY LYNN JARRELL OSU & NANCY REYNOLDS SP


CONCEPTUAL SUMMARY

This video is a three-part PowerPoint presentation on the general and particular law of religious institutes, the role of leadership, and the reorganization of internal government structures within institutes as they adapt these structures to current needs and diminishing membership. Considerable time is spent discussing leadership’s responsibility in civil corporation matters, sponsorship duties, and relationship with different church officials, all of which are developing concerns for congregations as they face the need to hire non-members to fulfill certain congregational duties.

MAJOR POINTS

Part I provides a review of the definitions for governance, authority, and jurisdiction and their underlying values of subsidiarity, collegiality, collaboration, and common good. This may be repetitious material for leadership members.

Part II provides information on the proper law of governance for leadership, including leadership role in decision-making, in being faithful to the Church, in carrying out the duties of teaching, sanctifying and governing, and especially in furthering the mission of the institute.

Part III addresses the internal reorganization of government within religious institutes and shares specific examples of how this is happening in different ways in different institutes.

PRACTICAL APPLICATIONS

Some practical suggestions for how to work with Rome for structural changes are offered. Particular problems related to diminished pools for leadership or for other specific congregational roles, including how other people (laity, other institutes, etc.) could perform the duties without being members of the institute. A question and answer session deals with other specific questions from attendees at this conference.

GREATEST VALUE? FOR WHOM?

The canonical and legal information provided is the greatest value of the video to assist leaders when internal re-structuring becomes necessary. Responses to some practical questions concerning such issues as the appropriate ministries for members of a religious institute to assure the ministry is furthering the mission and charism, how to handle civil disobedience issues, concerns when members are not engaged in any ministry, etc. These are answered at the end of the video.

OTHER COMMENTS

Since only the PowerPoint slides are seen in the video with voice-overs of the two presenters, this video should be helpful material for review by leadership but may be difficult to use in a group setting. Concentrating on the material for 90 minutes is difficult because of the use of so many slides filled with words. There is some difficulty with the video because the volume seemed to fade.

7. “WEIGHING THE COMMON GOOD: CHOICES FOR THE FUTURE BY A RELIGIOUS INSTITUTE AND ITS MEMBERS” BY LYNN JARRELL OSU & NANCY REYNOLDS SP


CONCEPTUAL SUMMARY

Drawing on Vatican II’s definition and using the concepts for philosophers and theologians, Jarrell and Reynolds offer a very excellent introduction to “common good”
and how it relates to religious institutes as they identify the desired ends for guiding the institute’s responses to charism, origin, and nature of the institute. They speak of the “heart of common good” as the “sum total of social conditions which allow people (groups/individuals) to reach their fulfillment more fully and more easily in working toward the common good.” This workshop focuses on what is entailed in weighing the common good by the institute’s membership. The outcome of the collective common good consideration also provides assistance for appropriate choices by individual members who personally may be evolving to different positions in living the institute’s life.

**MAJOR POINTS**

Using a model of two fictitious institutes, the presenters develop (with the use of excellent slides) the key elements necessary for achieving the common good within the congregations. The serious commitment in the pursuit of the common good entails:

1. Developing an ongoing process of identifying and preserving the desired ends that are essential to the life of the institute;
2. Rejecting individualism for the sake of the life of the group;
3. Exercising prudence in weighing matters in all the complexities that impact the desired ends;
4. Recognizing that if the common good is not maintained, the group will cease to exist;
5. Accepting the fact that rights flow from first accepting responsibilities;
6. Calling members to be fully awake to appreciate interdependence; to live with a focus on life beyond themselves, and to remain in communion with the institute (members have been allowed to live on the fringes without accountability for the common good).
7. Assuming responsibility to pursue the common good, which comes from the commitment made at profession and lived in communal context.

**PRACTICAL APPLICATIONS**

Some practical ways of using the process of the common good to reach the institute’s desired ends are suggested: Concrete goals for members to set and implement which will avoid conflict within Church and public forum, prevent any upset between leaders and members, and gain support by the institute when addressing social justice issues. Considerable time was devoted to possible steps an institute takes when an individual or small group wishes to make a public stand on some issue. These would include personal and collective discernment, policies and processes of the institute, preserving members’ rights, developing informed conscience; upholding the spirit/charism of the founders, safeguarding members respect for the institute.

**GREATEST VALUE? FOR WHOM?**

Leaders of institutes will find this material a helpful review of the concept of common good and how it applies to religious institutes today. It will also reinforce the rights and responsibilities of both the individual and the congregation for what it means to hold membership in a religious community.

**OTHER COMMENTS**

This was one of the best 1½ hours I have spent on reflecting on the meaning of my membership and accountability for building up the common good – which must follow from my relationship to the other members, my responsibility to enter into the common life and mission more fully, and by living in a spirit of free choice to remain as a professed member of my congregation.

8. “IS OUR RELIGIOUS INSTITUTE VIABLE?” BY JANICE BADER CPPS & ANN CARVILLE OSF


**CONCEPTUAL SUMMARY**

Viability is on a continuum: viable-living, vital-passionate, alive, and dying. Each institute must decide on its own degree of viability. Difficult, honest conversation about who is available for leadership and new membership are essential elements related to viability. As believers in the Pascal Mystery, religious need to ask themselves what they must die to in order to come to new life. To be vital, religious must act, behave as if they are vital.
Both speakers stressed for viability: mission as the critical driving force, being people-centered with mutual purpose and mutual support, leadership is key, age and finances are factors but not determining ones, relationships both inside and outside are important, the entire membership must be involved in defining and articulating viability. Some questions: Are all moving in the same direction? Can we sustain life? What is the preferred future? Are we realistic about our current situation?

An instrument for assessing viability was developed in 2000. Another resource, “A Future Full of Hope: Planning in Religious Institutes” (2008) is a DVD available through NRRO. Ann Carville gave detailed practical explanations of lists of elements to be considered in assessing viability.

For anyone who believes assessing an institute’s viability is an essential part of future planning.

Since the workshop is from 2009 and the tool from 2000, maybe something newer is available


Religious life as an organization experiences changes in law as it passes through its life-cycle. The “methodology of law” can be a tool for helping a religious institute live the Gospel and in dealing with and responding to issues and challenges of its present situation. Planning should be done early when members have the energy and resources to implement a plan that will “ensure the legacy of service, spirit, and ministry” for the members for the future. Recognizing the reality of decline and planning for closure can be a source of peace.

Possibly 300 to 350 religious institutes are in the last decades of their life and need to address the juridical issues for this time in their existing life. Signs of decline are the majority of members are at advanced age, few younger members, and no new members. There are three critical issues facing a declining institute: its sponsored ministries, care for both the aging and active members, and leadership. An institute has three choices when dealing with these: do no planning, join with another institute, or use its final years to plan for outsiders to meet these responsibilities. The workshop focused on the latter choice, giving detailed steps for transforming sponsorship, providing for the elderly, and transitioning leadership to non-members. Sponsored ministries involve both civil and canon law. These ministries may be educational, health care, and social service institutions. Caring for the aging members involves facilities and financial assets. Communities have different ways of financing: financial planning, fund raising, placing assets in a charitable trust. Facilities may be their own, separately incorporated, licensed, and/or management given to others. Great detail was given about establishing a charitable trust to manage assets for care of the aging members. Whatever choice, it is essential to have clear communication and role descriptions to assure care. Transitioning administration involves the civil corporation, members of the board, its corporate articles and bylaws. The new non-members would oversee temporal affairs. Canonical leadership would carry out the canonical and pastoral care of the institute and its members. When an institute no longer has members for leadership and councilors, a choice of a canonical administrator is a possibility appointed by the CICLSAL. An institute could nominate choices. The pros and cons of the bishop as a canonical administrator were given – mostly con. A chapter of affairs for completion to discuss the four tasks and for “celebrating and memorializing its [the institute’s] life and entrusting its legacy to others” should be held when these tasks are advancing and giving direction for the future. This would be when the institute still has years to exist. Younger
members must feel that they are part of a still vibrant religious community.

**PRACTICAL APPLICATIONS**

A very comprehensive article for planning for decline. Pages of practical, detailed information are given to each of the four issues with reference to civil and canon law covering both legal and pastoral concern for the institute and its members.

**GREATEST VALUE? FOR WHOM?**

Leadership and all members who recognize the signs of decline, who believe in the need for planning now for closure, and who desire to live religious life and its mission with vitality into the future.

**OTHER COMMENTS**

Having watched four other presentations, I think this one seemed the most practical, comprehensive, and valuable as a tool for planning. Also it was the most difficult to decide what to include as major points. Almost each sentence could be seen as major. The author does not see covenant relationships as a realistic choice because there are not enough viable institutes with which to partner.

10. “LEADING TODAY TO SUSTAIN TOMORROW: WHAT AND WHOM ARE WE LEADING?” BY ERIN GEORGE & CAROL ZINN SSJ


**CONCEPTUAL SUMMARY**

In this workshop Carol Zinn SSJ and Erin George begin with a brief summary of how religious life has changed throughout history and in particular cultures, and that through all these changes it has maintained “a radical response to the Gospel.” They recognize that we are living in a time “out of balance” – personally, in our Church, and in society. The reasons for this and the concepts leaders need to address in planning for the future of their religious institutes are presented. They stress that planning for the future must be done from a wholistic approach (“the big picture”) based on the mission/charism of the congregation rather than from a management approach. Focused conversations for planning must always include why we want to make the choices we make. Using the U.N. Goals for 2030 as a model for understanding sustainability, the balance between understanding and managing in today’s culture is further described.

**MAJOR POINTS**

The shift in leadership planning today involves the work of planning for the future of the mission and charism (e.g. patrimony, ministry considerations, pastoral responsibilities) versus managing issues for operation and support of the institute (e.g. financial sustainability, human and financial resources, property and buildings, members’ needs. Visual charts are used throughout the presentation to further describe the tensions leaders face in balancing choices and decisions made for the institute. Too often time is spent to “manage, manage, manage” without going back to see what has changed in understandings – which could affect the choices made for the future.

**PRACTICAL APPLICATIONS**

1. How does a “sponsored ministry” further the mission/charism of the institute? Can the congregation trust the management of the ministry to lay persons who can continue the mission/charism? How can leaders involve members in understanding what we can no longer “manage”?

2. As many of our congregations have only 15% of their members under the age of 70, do we realize that decisions must be made now regarding management and governing in the institute? (The institute may have time for only two more general chapters!)

3. By focusing on the “Big Picture” – i.e., the mission and charism – members may begin to experience a new freedom that comes from the “letting go” that will be required of all of us. An example is used that by taking a “high dive” into the deeper waters, the freer we will be as we face the realities of our vulnerability, anxiety, fears, and risk and become free to move into the future.

4. Pope Francis reminds us to “honor the past with
gratitude, live the present with passion, and look to the future with hope.”

**GREATEST VALUE? FOR WHOM?**

Perhaps the greatest value may be the emphasis on the balance needed by leaders for focusing on the bigger picture of mission/charism rather than on the immediate decisions of management that require so much of their time. Leaders and members alike need to trust that others may do many of the management tasks of the institute. Perhaps leadership teams would benefit most from hearing the message presented by Zinn and George. However, all members could be enriched by reflection and suggestions on how to plan for a sustainable future.

**11. “WELL DONE, GOOD AND FAITHFUL SERVANTS: MOVING TOWARD COMPLETION” BY SANDY SCHWARTZ FSM**


**CONCEPTUAL SUMMARY**

There is a time for everything. Religious institutes are where they are now not because of anything they have done wrong or not done. Critical questions for religious to ask to direct planning: Where and how has God been with us in the past? To what is God calling us now? and How can we be faithful to God’s call? Even while being honest about the reality, how can religious live fully rather than choosing death and working toward it like suicide?

**MAJOR POINTS**

Schwartz gave the timeline of her community’s 1987 reunion with its original group and how after that until now it has been in continuous planning for completion. Leadership used the Assessment for Viability in 1999. In 2001 they decided to do no active recruiting but to focus on the reunion. They did a feasibility study on their motherhouse in 2006 and completed the move of sisters and administration by 2011. Through all these changes and planning the following essentials were explained using a handout: name and claim the reality; hire consultants who understand and can help members with communal discernment; use facilitators for fostering honest conversation; involve as many people who are able and keep everyone informed; use committees for action; rituals are important to deal with the emotional toll; address all the people who will be impacted – sponsored ministries, employees, donors, etc. The central consideration in all the planning is the mission of Jesus and how to free members for service to God’s people.

**PRACTICAL APPLICATIONS**

All the questions above would seem to be helpful as guides for any kind of future planning.

**GREATEST VALUE? FOR WHOM?**

Planners.

**OTHER COMMENTS**

All four videos I watched (NC13WS25, NC13WS29, NC09WS15, NC15WS28) focused on the following ideas: Planning for the future needs to be the priority of leadership now. There is an assessment tool for viability and other tools for planning are available. Covenant relationships (NC13WS25 is very detailed and thorough in this regard). Handouts listed essentials in multiple areas: capable, experienced, willing, and acceptable to the membership people for leadership and sisters under 60 willing to act as a formation community are keys to viability; all members must be realistic and involved or informed about the state of the institute; and discerning God’s call for now, the mission of Jesus, and caring for the members should be at the core of the planning.

**12. “CHOOSING TO BE PRO-ACTIVE ABOUT THE FUTURE: THE REALITY OF ECCLESIASTICAL INTERVENTION IN A RELIGIOUS INSTITUTE IN DIMINISHMENT” BY LYNN JARRELL OSU & NANCY REYNOLDS SP**

CONCEPTUAL SUMMARY

This presentation stresses the importance of religious institutes being proactive in planning for the future when reduction of membership, loss of capacity to exercise leadership competently, and/or lack of sufficient financial resources to sustain its members and their mission is evident. It answers questions about interventions and suppression and the role of the church in these situations. It also stresses the need for a community to determine the capacity of its members to continue making decisions and governing their institute.

MAJOR POINTS

1. When weighing the future of an institute one must first recall the institute’s origins and reason for existence. There are four stages for an institute’s existence: it has existed for a stable period of time; it is financially viable now and into the future; it has growing membership and a capacity and readiness to govern; and it presents a clear expression of the group’s charism, spirituality and apostolic work.

2. There are three areas that make up canonical governance: general superior, general council (at least three members besides the superior, and holding a general chapter.

3. Significant long-term diminishment in any of these three areas: (a) reduction in membership and accompanying loss of its collective quality of life and/or (b) lack of sufficient financial resources to sustain an institute’s members and mission, including lack of personnel for treasurer and those with financial expertise and/or (c) loss of an institute’s capacity to exercise governance competently.

4. If an institute isn’t proactive in its planning, an ecclesiastical intervention may take place if the life of its members and carrying out of an institute’s mission are significantly reduced. The initial action that may take place is a formal visitation followed by provisions for appropriate assistance. This may take a significant period of years.

5. Suppression is only done when there is a just cause that cannot be addressed appropriately and in a timely fashion.Suppressions can only come from CICLSAL, not from a bishop.

6. The choice to be proactive is completely within and institute’s power. The responsibility for proactive planning is the obligation of all three of these functioning together: leadership, chapter, and the entire membership. This planning needs to be done when members have the capacity to choose wisely and in an informed manner.

7. Proactive planning and decision-making is not a trigger for ecclesiastical intervention and/or suppression. This doesn’t give a diocesan bishop a role in the planning process or at the time of suppression.

8. Legacy is planning for an institute’s heritage when the institute no longer exists, which can include sacred items, formal name, charism, and archives. Legacy is not setting up a charitable foundation for groups to carry on an institute’s ministries; this can be done while the institute is still active. If an institute’s legacy is not planned for, it will be taken care of by the church. The legacy may also include what the associates of an institute may carry on into the future. Legacies can be done through trusts, foundations, dissolutions, and alienation.

9. An institute’s members need to recognize and own the facts of their diminishment in order for them to choose and engage in proactive planning. They need to choose to move through the fears and to focus in ample space and time to create the plan.

PRACTICAL APPLICATIONS

The presentation continually stresses the necessity for an institute to be proactive. Examples of religious institutes’ situations are presented with discussion on the importance for those institutes to begin planning for the future.

GREATEST VALUE? FOR WHOM?

Practical ideas for religious institutes of any size to be proactive in planning. Scenarios of different sized institutes are presented with questions and answers about whether that institute needs to be proactive or has passed the proactive stage and needs interventions.

OTHER COMMENTS

Difficult to hear Jarrell when she is speaking.
13. “COVENANT RELATIONSHIP” BY DAN WARD OSB


CONCEPTUAL SUMMARY

This five-page article in RCRI Bulletin No. 8 was published in conjunction with the DVD packet “Planning for the Future: Covenant Relationships.” Dan Ward has been instrumental in crafting the concept of covenant relationship as one possible means for a religious institute to complete its mission. The intent of the article is to examine how an institute can respond to the call of the Spirit to discern and complete its journey to completion.

MAJOR POINTS

1. A covenant relationship is defined as “a commitment between two religious institutes to face the future together. One is discerning and planning for completion; the other is willing in some ways to assist the other in its completion.”

2. The covenant is not a legal agreement but a commitment to work together and to discern what is required over the years to implement the relationship.

3. The relationship is described in three parts: management, governance, and legacy. Possible ways each of these could be part of the agreement are described, though not with as much detail as in the DVD.

4. Since a religious institute is both a canonical and civil entity, these two areas must be dealt with separately in the agreement.

5. Suggestions are given regarding the governance of the completing institute and the canonical and civil implications when it reaches the point of not having sufficient numbers or competent members to govern the institute.

6. Because of the time it takes to develop and implement the process for a covenant relationship, an agreement should be entered into when there is no crisis.

PRACTICAL APPLICATIONS

This article gives general concepts and principles for developing a covenant relationship. The practical applications are not as detailed as would be needed if an institute is seriously moving toward completion. Other practical models may have been better developed since this article was published in 2012 and these models might be more helpful for leaders of institutes to develop the practical aspects of covenant relationships. Ward does state that “the way in which a covenant relationship has been described here may change over time because there may not be enough institutes able or willing to be accompanying institutes for all those who are completing their journeys, and the process may require that lay persons provide the leadership and management of the completing institutes.”

GREATEST VALUE? FOR WHOM?

Leaders of religious institutes that are just beginning to investigate the concept of covenant relationships might benefit most from this article as an initial introduction to the concept.

14. “EXPLORATIONS ON THE ‘COMPLETION’ OF RELIGIOUS INSTITUTES” BY AD LEYS, THEO SPONSELEE CSA, & Cees VAN DAM CSA


CONCEPTUAL SUMMARY

This article is the second of three articles in RCRI Bulletin No. 8 published in conjunction with the DVD packet “Planning for the Future: Covenant Relationships,” a project of RCRI to assist members of religious institutes in decision-making and planning. At the end of the article, a six-page questionnaire is provided to assist with obtaining an overview of an institute’s present situation and for making arrangements for the future. All of this is from the perspective of the decline of religious institutes in Europe, particularly in the Congregation of St. Augustine in which both Van Dam and Sponselee were members. Leys was General Secretary for the Dutch Religious Conference (KNR) in the Netherlands.

MAJOR POINTS

The article is divided into two major sections, with each section having multiple subdivisions. Some pertinent ideas from each section are:
Part I. Aspects of the “Art of Dying” in Institutes of Consecrated Life

Already in 1977 Johann Baptist Metz recognized the decline and possible end of religious institutes. In a book published that year he “argued that religious institutes need to realize that the Holy Spirit called them into existence, but that this existence need not necessarily last for all eternity.” There is a need for religious congregations to accept that their special calling may at some point end. Living with this attitude is compared to living through Kubler-Ross’s stages of death and dying: denial, anger, negotiation, and depression, and finally acceptance. The end of an institute becomes most obvious when for a prolonged period of time no new people have expressed a desire to join. Current members are encouraged to live more freely in the present as they live through the pain of moving to completion. When the end of the institute is in sight, the institute as a whole needs to deal with all the practical matters such as privatizing institutions; settling historically, culturally, and financially significant objects obtained over the course of the years of existence; archives; cemetery, etc. When members develop an attitude of life rather than death they become open to the challenges and do not become rigid or paralyzed by dying. Things to consider carefully when discussing the end of the institute: how many mentally and physically capable staff members there are; whether new members could be offered appropriate formation; to what extent the institute is actively involved in society and is willing and able to adapt its apostolate to new needs; whether the institute has sufficient financial means to engage in new initiatives. As major superiors face declining membership, how can they provide for the care of members and find ways of handing over duties and property to others, etc.? The envisaged end requires thorough consideration of law, both canonical and civil.

What should the KNR do in response to the problems identified? The Congregation responded: Some institutes will unavoidably experience completion; if competent leaders for an institute are no longer available, a conference needs to help; mergers are not a real solution – only cosmetic. The KNR also asked itself three questions: How do we create prerequisites for a good religious and social life for current members? How do we creatively address the problem of an increasing lack of good leadership? How do we deal with the fading attraction to religious life as a vocation? In responding to these questions, the remainder of the article dealt with seven possible options that might be pursued for governance in specific situations, especially as these relate to the Netherlands.

The final five pages are titled: “Questionnaire to Assist Religious Institutes with Obtaining an Overview of Their Present Situation and Making Arrangements for the Future.” The questionnaire was developed by the KNR in 2002 to help institutes outline the current situation and plan for the future.

PRACTICAL APPLICATIONS

Some of what pertains to the Netherlands is also pertinent in any apostolic religious institute.

GREATEST VALUE? FOR WHOM?

The article itself is interesting, but much of it applies to what the Dutch Religious Conference could do to assist institutes rather than what an institute might do for itself. However, the questionnaire at the end might be very useful for any institute in the U.S. today as it faces similar issues in planning for the future of its congregation in moving toward covenant agreements and/or completion.

Part II. Governance as an Aspect of the “Art of Dying”

When the institutes in the Netherlands began to “see the writing on the wall” in the early 1990s, they knew this was a call for good planning and appropriate action regarding their future. As the of decline in members became more evident, a delegation of the Dutch Religious Conference in the Netherlands (KNR) reported their concerns and put an open question to CICLSAL:
15. “STATISTICS ON AGES AND NUMBERS OF MEMBERS OF U.S. RELIGIOUS INSTITUTES” BY DONNA MILLER & NRRO


CONCEPTUAL SUMMARY

This article is actually a series of four charts prepared for RCRI by the National Religious Retirement Office (NRRO) to assist religious institutes as they plan for the future of their congregations with realistic statistics regarding ages and numbers of members.

MAJOR POINTS

The article presents the four goals of the NRRO as an introduction to the statistical charts: to raise funds for retired religious; to help religious institutes realistically assess their current retirement needs and implement planning; to educate religious institutes to allocate assets realistically; and to develop educational tools, programs, services, and resource materials that enable religious institutes to address retirement wisely. Using data submitted as of 12/31/2011, the four charts include: Median Age of Religious Institutes of Men and Women, Number of Religious by Median Age of Institute, Size of Institutes with Median Age of 80 or Higher, and Number of Religious in Institutes with Median Age of 80 or Higher by Size of Religious Institute.

PRACTICAL APPLICATIONS

The statistics were done for the year ending 12/31/2011. The information would have to be updated by five years in order to serve the needs of institutes today. However, the facts of 2011 show very clearly what the trends are and should help leaders “get the picture” of what they are planning for.

GREATEST VALUE? FOR WHOM?

Important information for both leaders and members to know as they look at the future of their congregations. Numbers and graphs speak loudly of the truth.

16. “DIMINISHING HUMAN RESOURCES FOR LEADERSHIP IN RELIGIOUS INSTITUTES: A CANONICAL REFLECTION ABOUT THE SITUATION IN THE NETHERLANDS” AND “QUESTIONNAIRE ACCOMPANYING ARTICLE” BY MYRIAM WIJLENS


CONCEPTUAL SUMMARY

A realistic evaluation of the present conditions of a religious institute is a way to begin to plan for its future while leaders and members have the physical and psychological energy to do so. Before an institute no longer has members capable of local, provincial, or general leadership, it is wise for it to plan for itself how it will be governed in the future. Possibilities explored include mergers, religious from another institute, and non-members with an understanding of the charism. Clear role descriptions, channels of communication, and the understanding that these “coordinators” are not members of the institute are essentials.

MAJOR POINTS

The article as a whole was focused on the challenges of local, provincial, and general leadership of institutes in the Netherlands and how the Holy See is helping them face these. A second point of discussion was the need for an evaluation of the present state of the institute which includes topics such as: the purpose, spirituality, pastoral care, finance, accommodations for members, management, relations with the diocese, artworks, archives, and documents. Each of these was explained and followed by a detailed list of the duties of superiors with the hope of finding new ways to meet these at a time of diminished membership. The duties to be retained by a religious are those related to the vows. Other points: consideration of relation of civil law to the institute; treasurer not to be treasurer in the diocese or as many as three institutes; a juridic person with wide responsibility (e.g., Canada 2010); institutes do not exist for governing but for ministry.
PRACTICAL APPLICATIONS

Solutions discussed in great detail for each level could have application to institutes with local and provincial superiors and/or international connections. The questionnaire accompanying the article could guide evaluation of an institute’s present state.

GREATEST VALUE? FOR WHOM?

Leadership and members involved in planning for the future.

OTHER COMMENTS

Strong, detailed focus on what appeared to me to be situations in European institutes.

17. “PROVIDING LEADERSHIP IN AGING PROVINCES: A CHALLENGE TO GENERAL COUNCILS” BY MYRIAM WIJLENS

This fifteen-page article is from a lecture given by Dr. Myriam Wiljens, a canon lawyer and member of the Canonical Affairs Commission of the Conference of Major Superiors in the Netherlands. The article addresses the aging of community members, resulting in the lack of personnel for finance officer, for leadership positions, and for major superiors. It presents different options for pontifical right or diocesan right communities in dealing with these situations according to what canon law states.

MAJOR POINTS

1. On the whether the finance officer needs to be a member of the religious institute, a community must take a thorough look at its constitutions. The acts on the revision to Canon 636 decided that on this question it should be determined by each institute’s constitutions. Some possibilities for institutions could be:
   a. If constitutions do not state that a member must be the finance officer, then a non-member could be appointed. A non-member finance officer can never be a member of the chapter.
   b. If constitutions do state that the finance officer is to be a member, the institute could ask for dispensation from the competent authority. There would need to be a “just and reasonable” cause in proportion to what is being administered.
   c. Changes may be made to the constitutions for more flexibility if it is foreseen that provisions will be needed by several provinces in the future. The Holy See would need to approve this.
   d. Care should be taken to choose the right non-member, someone who is truly skilled in financial affairs and absolutely distinguished for honesty.
   e. Finance officers must be aware that in administration of goods a religious institute does not possess property, but as temporal goods.
   f. The finance officer exercises the task under the guidance of the superior, which could be a problem if an institute is having a problem finding a superior. It might be wise to implement Canon 1280, that every juridical person should have a finance council, or at least two financial advisors.
   g. A small institute might outsource or ask for assistance from a larger institute with financial/administrative tasks. This may result when provinces merge.

2. The number of councilors is determined by the constitutions. When an institute is considering changing that number these are some thoughts they need to reflect on:
   a. Would reducing the number of people create a heavier burden? It might be easier for more people to share the workload.
   b. Number of councilors relates strongly to the culture of decision-making of the institute. Are most decisions made by the major superior? Does the major superior have a hearing or obtain consent from the council, or does the leadership team make unanimous decisions?
   c. Amount of time of service may be changed; e.g., instead of six years a counselor may just serve three.
   d. Ask for assistance from the outside. For example, have a secretary or office manager prepare the meetings, write minutes, and assist in the execution of the decisions where necessary and possible.
   e. Appoint a counselor who is not a member. So far communities have only appointed religious or clergy from another community. In the long run, other
Wisconsin Religious Collaborative: Executive Summaries

communities may not have the personnel. Therefore, a conversation between the religious, the bishops, and the Holy See is needed to focus on who can be appointed. Important to distinguish between members and non-members, and not just between religious of other institutes – diocesan clergy on one hand and lay persons on the other.

3. Shortage of personnel for major superior. It often takes a long time before an institute admits that no one can be major superior. It often surfaces when the incumbent superior becomes seriously ill. Different options:
   a. Suppress the province and merge the different existing canonically erected houses that used to belong to the province into one house.
   b. Merge in time with another province.

4. Advantages and disadvantages of suppression:
   a. Former province remains a unit and interactions with outsider of other provinces is unnecessary.
   b. There are no language and/or cultural issues because there is no merger.
   c. Constitutions make provisions for houses under the generalate.
   d. Attention is to be made with regard to the interaction of the civil and canonical persons. Some countries require that there is a juridic person in canon law with its main seat in the country.
   e. In civil law it can be made clear that the change is merely an internal reorganization; therefore, no tax is due on the transfer from one juridic person to another. In canon law the transfer of property between parts of a religious institute is not considered alienation; therefore, there is no need for permission from the Holy See.
   f. Houses do not need to have a chapter.
   g. Change from a province into a house may not be in the best interest if the province has younger members that joined not to be in leadership but because of the charism and apostolate of the province.

5. Advantages and disadvantages of merging provinces:
   a. Need for less people for leadership roles.
   b. Provinces are much larger requiring more travel.
   c. Familiarity with the languages, differences in culture, and financial, fiscal, social and civil laws may result when merging with provinces from other countries.
   d. Initial leadership teams may be composed of representatives from different provinces but as time passes some provinces will have no one available to serve.

PRACTICAL APPLICATIONS

This article gives many advantages and disadvantages of the different possibilities for general councils to help provinces in the challenge to provide leadership. Wijlens concludes that there is no simple solutions and the situation differs from one place to another.

GREATEST VALUE? FOR WHOM?

Wijlens is mostly familiar with European communities and gives examples from their situations. The different solutions presented can also be used in the United States.

18. “NEW PJP MODEL ‘LEAP OF FAITH,’” BY FRANCIS G. MORRISEY OMI


CONCEPTUAL SUMMARY

This three-page article is a brief report on the Canadian Religious Stewardship (CRS), a newly formed pontifical public juridic person (PJP). Other PJPs only addressed continuity of ministries carried out by religious institutes. This article gives a description of the purpose and planned workings of this new undertaking by Canadian institutes that will address other needs of communities.

MAJOR POINTS

PJPs have been used particularly in the United States, Canada, Ireland, and Australia. It is more common for the church to establish foundations and trusts in other countries. Creative ways have been taken by PJPs to help the communities to ensure continuity of their ministries, but little has been done to assure the life and continuity of the institutes themselves or appropriate care for their members. The Canadian Religious Stewardship uses various civil entities, particularly a civil corporation
known as Canadian Catholic Congregational Management. A community can choose which services it wants to use and for how long. The Canadian PJP’s five purposes are (1) to assist religious institutes to manage and safeguard ecclesiastical temporal goods and assure proper administration according to canon/civil law; (2) to provide personal care programs and services to members; (3) to accept ownership of ecclesiastical temporal goods when the institute wishes to divest itself of property; (4) to accept governance responsibilities for health care, educational, religious and social service ministries supported by the institute; and (5) to accept sponsorship of an institute’s ministry with the consent of the local bishop. The PJP must establish good relations with the diocesan bishop. Members of the CRS need to complete an initial formation and participate in continuing formation. Clear annual reports will need to be sent to the Holy See since this is a new undertaking.

PRACTICAL APPLICATIONS

The article written in 2011 just gives the initial information about this model set up in Canada prior to it being implemented.

GREATEST VALUE? FOR WHOM?

The value of this article is to just inform about this new model, but it doesn’t go into how it is working once it was implemented.

19. “UPDATE ON CANADIAN PJP PROJECT” BY DONNA MILLER


CONCEPTUAL SUMMARY

This six-page article is an update on the Canadian PJP project reported on by Francis G. Morrisey that was published for Catholic Health Association in 2011. Pertinent information about this project was provided by Raymond Lafond and Faye Wylie, the driving forces behind the project. The article describes the different organizations that were set up to assist religious communities in dealing with five needs: managing and safeguarding ecclesial temporal goods according to canon and civil law, personal care needs/services of their members, ownership of ecclesial temporal goods, governance responsibilities for ministries, and sponsorship of an institute’s ministry. A corporate organizational chart is included in the article.

MAJOR POINTS

Canadian Catholic Congregation Management (CCCM) is a non-profit organization established in 2008 to support Canadian Religious Stewardship (CRS) in its assistance to diminishing religious congregations in their five basic needs. Catholic Religious Collaborative Organization in made up of three organizations: Canadian Catholic Congregation Management (CCCM), Catholic Religious Self-Insured Retention Program (CRSIRP), Canadian Religious Administrative Services, Inc. (CRASI). All these corporations are owned and directed collectively and independently by the member congregations. A recent development that CRS and CCCM has undertaken is a not-for-profit corporation, Foundation of Canadian Catholic Congregations (FCCC), to receive and maintain a fund(s) and apply all or part of principal and income to charitable organizations; support the establishment and maintenance of communities of religious men and women abroad; carry out projects abroad that (a) relieve poverty by providing food and basic necessities to needy persons, (b) establish and maintain educational programs and facilities to advance the education of persons, members of the community, and the general public to improve comprehension of the Roman Catholic faith, and (c) provide health services and education to needy persons. The FCCC will support CCCM in two particular areas: (a) stewarding financial assets of religious congregations and providing grants to qualified donees and (b) enabling the work of religious congregations abroad to continue. CRS and CCCM have established several inter-community living arrangements across Canada, such as Trinity Manor in Saskatchewan, where members of ten religious institutes, diocesan priests, and lay persons can live in independent and semi-dependent arrangements.

PRACTICAL APPLICATIONS

Although this project was intended for Canada, it may be helpful to the religious in the United States in their own pursuits for the future.
GREATEST VALUE? FOR WHOM?

The greatest value is seeing what is being done by the religious congregations in Canada. Although this is a fairly new project, updates on its progress will need to be followed.

OTHER COMMENTS

The article got confusing with all the different organizations that were set up (CCCM, CRS, etc.), but the organizational chart at the end is helpful.

20. “PRACTICAL GUIDELINES FOR AGING INSTITUTES” BY AMY HEREFORD CSJ


CONCEPTUAL SUMMARY

This seventeen-page article is addressed to institutes that are currently in their last decades and provides practical guideline for these aging institutes. It addresses three different areas: providing ongoing leadership for the institute, providing care for aging members, and providing leadership in sponsored ministries.

MAJOR POINTS

Planning for decline is based on the institutes average age, not the size of the institute. Hereford states that it is critical for an institute to begin planning while it has members, resources, and energy to implement the plan.

PRACTICAL APPLICATIONS

1. Transition of Sponsorship of Institutional Ministries
This could be done by transferring sponsorship to another juridic person, but there are few religious institutes capable of accepting sponsorship. A ministry may seek independent status as a juridic person, either a pontifical public juridic person or a diocesan public juridic person. Some institutes are questioning the need for ongoing juridical sponsorship, particularly for ministries that provide social service.

2. Providing Elder-Care
Most institutes do not have sufficient resources to care for their elderly. They may enhance their financial position by financial planning and fund raising. Institutes need to participate in Social Security programs to help fill the deficit. Retirement assets is one area of concern. Some institutes have placed retirement assets in a charitable trust to protect them from civil liability and ensure that the institute has a continued reserve for retirement needs. With membership declining trustees may need to be non-members appointed to carry out that role in a voluntary capacity with certain powers reserved for leadership. It is important to foresee the need for successor trustees. To alleviate the need for finding successor trustees some institutes may need to have paid, commercial trustees, but it is important to have the resources to pay for these services. A second area of concern is the facility for elder care. If the retirement facility is separately incorporated and is treated as a sponsored ministry, the institute needs to make plans for transitioning sponsorship. If the elder-care facility is an internal infirmary and not separately incorporated, the institute needs to determine how to sustain its elder care. It may choose to close and sell the facility and use the funds to care for members in another facility, incorporate it as a sponsored ministry, or transfer the responsibility for care and management of the facility to non-members in exchange for the transfer of the future value of the facility, such as a “reverse mortgage.”

3. Transitioning Administration
Institutes generally have established civil corporations. These corporations may be established as a membership corporation or non-member corporation. In either case the elected leadership serves as the board of directors. A declining institute may choose to appoint non-members to the board of directors while the leadership retains oversight through certain reserved powers, which could include appointment of directors, approval of budget, receiving the audit, amendment of the articles/bylaws, and dissolution of the corporation. For this change, an institute’s leadership (board of directors) would need to make revisions to the corporation’s articles and bylaws. Non-member directors of the corporation would have the task of overseeing the ongoing temporal activities of the institute and manage its temporal affairs. They would
complete the work of transferring or closing any activities of the institute that are not related to the care of members or to sustainable activities of the institute. They would manage property, sell any underutilized property, and consolidate/down-size the institute's infrastructure. As long as possible canonical leadership of the institute needs to continue to carry out canonical and pastoral leadership, such as the tasks of settling the institute's archives and cemetery, holding reserve powers for the corporation and retirement fund, and overseeing elder care. When an institute no longer has members with sufficient energy and competence to exercise these roles it must find alternative ways to ensure the needs are being met. There is little precedent for situations when religious institutions no longer have members for canonical leadership, but this may be the time for a canonical administrator or team. Appointment of such an administrator would involve derogation of universal law (Canon 623) and of the institute’s constitution. The appointment of a canonical administrator can be done by ecclesiastical authority, such as CICLSAL for pontifical institutes and the bishop for institutes of diocesan right. Declining institutes may nominate a person or persons to whom they wish to entrust this responsibility, which would assist the ecclesiastical authority in their appointment. It is important for institutes to give attention to succession of administrators and some forum of accountability for the administrator. Conferences of major superiors may be in the best position to provide the service of canonical administrators of religious institutes in their territories.

4. A chapter of affairs for completion is necessary to address the tasks related to the settling of the institute’s affairs (sponsorship, elder care, civil administration and canonical administration), celebrating and memorializing its life, and entrusting its legacy to others. An institute needs to start early in this process while there are sufficient members that have the energy to fully participate.

5. Covenant agreements are of great interest among institutes in the United States. These covenants can come in many forms. The simplest form is when a single smaller institute enters into a relationship with a single larger institute that can provide the range of services that are needed by the small institute, such as elder care, management and administration, and canonical leadership. Another form is when a smaller institute enters into various covenants and agreements with different institutes and/or commercial entities. One downside of this is that with the aging of all religious institutes it is likely that there will not be enough larger stable institutes for smaller institutes to make a covenant with. It may be necessary to build a network of institutes and commercial service providers for the support and assistance that is needed.

**GREATEST VALUE? FOR WHOM?**

This article is important for any religious institute that is in decline.

**OTHER COMMENTS**

It is important that attention is given to the pastoral needs of members as they experience grieving and a sense of loss. Particular attention must be given to members who are younger than the majority of members and are still active in ministry. Care must be taken to enable them to continue to live a vibrant religious life.

**21. “AN EXPERIENCE OF GRIEF AND LOSS IN AN ERA OF TRANSITION” BY RAY MATTES IHM**


**CONCEPTUAL SUMMARY**

This four-page article was written by Ray Mattes IHM, who serves as Administrator of Homecare for the Los Angeles Province of the Sisters of St. Joseph of Carondelet. This article describes the different kinds of losses and the stages of grief an individual or a community may experience. It also addresses examples on how to deal with loss and grief.

**MAJOR POINTS**

Losses and grief are experienced differently among individuals/groups depending on their ability to adapt to changes, relational support, and importance placed on what was lost. Grief follows loss, but the act of grieving
doesn’t follow a specified set of criteria or a specific timeframe. Kubler-Ross identifies five stages of grief: denial, anger, bargaining, depression, and acceptance. John Bowlby identifies the following stages of grief: feeling of shock/initial disbelief, searching to retrieve what was lost, disorientation over the loss, and recovery. The goal of grief work was traditionally to return a griever to the previous emotional state he or she occupied prior to the experience. Ongoing research has challenged this perception on its impact on individuals. Narrative in an integral part in searching for meaning among losses experienced. Narrative encompasses the totality of both the individual’s and the community’s lived experiences. There are two different types of grief within a community: (1) “Uncomplicated” grief, which can be noted on psychological, physical, social, behavioral, and spiritual levels. The intensity and frequency of an individual’s reaction to the loss wanes with the progress of time. (2) “Complicated” grief is when loss occurs as a result of sudden, violent or traumatic situations/events. This can include role structures no longer in place and lack of human and financial resources to provide support. Pauline Boss refers to complicated grief as ambiguous loss, which may emerge from experiences of loss where the relationship between what is known and unknown is blurred, unclear, confusing. Ambiguous loss cannot be mastered in a normal sense. Boss presents the following guidelines for communities undergoing multiple losses and addressing communal grief and loss: (1) Address personal, familial, communal identities – what the community was prior to the loss experience and what the community has become. Reconciling the two identities becomes part of the shared journey towards healing. (2) Create an environment where individuals may freely share their uncertainties and hear differing perceptions, understandings, facts, and clarification of information, which can help individuals to discover meaning within the loss. Discovery of hope, “belief in a future good,” exists when the community sees the loss as part of a larger narrative.

**PRACTICAL APPLICATIONS**

This is a good overview of different stages of grief and loss and gives some simple ideas on how a community can deal with ambiguous loss.

**GREATEST VALUE? FOR WHOM?**

The information Mattes uses from Pauline Boss’s book *Loss, Trauma, and Resilience: Therapeutic Work with Ambiguous Loss* (New York, 2006) has some basic information for communities undergoing multiple losses.

**OTHER COMMENTS**

A short informative article that is an easy read on grief and loss.

**22. “RISING FROM THE ASHES: APPRECIATING AND FOSTERING POST-DEATH ORGANIZING” BY JEAN M. BARTUNEK RSCJ & IAN J. WALSH**


**CONCEPTUAL SUMMARY**

This nine-page article was written to explore the phenomenon of “post-death organizing,” or the efforts of former members of defunct organizations to create and sustain new ventures of the former organizations, and how leaders can foster such efforts.

**MAJOR POINTS**

Many organizations that close still have valuable assets and capabilities around which new organization may be built. Understanding how and why post-death organizing can occur can better prepare leaders and other members in dying organizations to plan “better” deaths enabling their valued resources to be harvested and revived through new entities. Reasons why individuals engage in post-death organizing: (1) Conservative Impulse: a concern for reconstituting a shared past. Individuals will search for ways that allow them to reestablish the status quo and to continue working in ways that mirrored their lives before the disruption. (2) Continuing Bonds: Individuals want to stay connected with the organization’s valued characteristics. (3) Necessity Entrepreneurship: Individuals feel compelled to start a new organization because they do not perceive the availability of any suitable alternatives. The degree of social support from leaders can help individuals deal with and mourn over their loss. The four
approaches that leaders can take in fostering the founding of new organizations are: (1) Engaging individuals in the open discussions about the struggles that are happening within the organization and that all possible rescue options have been exhausted. (2) Reframing death as an opportunity for turning extant conditions into exceptional outcomes will help take individuals’ minds off their negative emotions, stress, rumor spreading, and interpersonal conflicts. (3) Allowing the members of the organization to interact and attune themselves to the characteristics of an organization from which they derived value. These valued characteristics may be relationship with other members of the organization or importance of organization’s artifacts, work, or occupations that are intrinsically important. (4) Finding ways to build former members’ confidence and capabilities to create and maintain new businesses by investing time in facilitating new connections among members and others that may be helpful to them and/or the leaders can create post-death organization of their own. Possible benefits of post-death organizing are leaving a legacy, helping economic recovery, and a creating a positive community identity. Forming and sustaining post-death organizations is no easy task or universal prescription.

PRACTICAL APPLICATIONS

The article gives encouragement to organizational leaders and members to consider post-death organizing as an opportunity for creative and life-giving ventures.

GREATEST VALUE? FOR WHOM?

Although this was written for business corporations, there are many great ideas that religious communities could benefit from.

23. “RELIGIOUS LIFE: YESTERDAY, TODAY AND TOMORROW” BY CAROL ZINN SSJ


CONCEPTUAL SUMMARY

This presentation points out the we live in holy times filled with challenges and graces. As religious we are called forth to remain faithful, hopeful, joyful, and peaceful through these evolving times. Religious life is a life and is God’s work.

MAJOR POINTS

Religious life is a life, it is God’s work. Religious life will go through the same changes as the cosmos because it is a life. Diversity is the key to ongoing religious life. Religious life is not static but ongoing, unfolding, and emerging. Religious life is a sequence of irreversible transformations. Religious life is not about ministry, not about the Church, but about life in the world. God calls just who God needs, when God needs them, and for what they are needed. Evolution of religious life: (1) Growth phase: over a long period of time some visual expression of a radical response to the gospel emerges. (2) Decline phase: over a short period of time there is a sense of ambiguity and wondering what this is all about, what is its identity and purpose. (3) Change-over phase: again over a short period of time a need emerges in history and culture. Religious must desire to be faithful to the God-of-the-Future and hopeful that what we are called to do is a contribution to the world. Religious must decide to be joyful by having a settled assurance that God is in control, a quiet confidence that everything will be all right, and make the choice to praise God in every situation, and they must decide to be peaceful by having a deep sense of calm and freedom from disturbances in what is happening around them.

PRACTICAL APPLICATIONS

Religious life is a life; therefore, it will go through changes and transformation. It is what it is – God’s work. Our task is to do what we have to do to allow God to do what God needs to do.

GREATEST VALUE? FOR WHOM?

The greatest value is to realize that religious life is going through the same changes that all living organisms go through. This presentation is a great reflection for leaders and for members of religious communities, especially with those that are struggling with the changes that are taking place.
24. “HOW LEGACIES MAY BE PRESERVED AND, INDEED, RESURRECTED” BY JEAN BARTUNEK RSCJ


CONCEPTUAL SUMMARY

In addition to planning for its conclusion, a religious institute should also plan who and how to preserve its “valued elements.” Leadership is responsible for planning for decline and conclusion. A small group, usually a few “angry” people, could plan for the preservation of the legacy.

MAJOR POINTS

Three major elements identified for saving are relationships, material artifacts, and the culture, values, and the charism of the institute. The open discussions and sharing with the members and non-members during the years of planning for decline and conclusion will help reveal the connections, memories, and influence of the institute that it wants to preserve. Museums, foundations, alumni clubs, and the creation of new organizations by former members are examples of ways to preserve and resurrect an institute. Each institute will use the relationships it has established to preserve in some way the contribution it made during its lifetime.

PRACTICAL APPLICATIONS

Great detail was given of how the vision, creativity, and energy and even the property of Studebaker have been saved. Study of this example and that of the Beguines, which was given with lesser detail, could be a practical help for this objective.

GREATEST VALUE? FOR WHOM?

Volunteers with creativity, knowledge, and love of the institute with the interest and energy for preserving its legacy.

25. “LEADERS FOR THE JOURNEY” BY SHARON HOLLAND IHM


CONCEPTUAL SUMMARY

In this 34-minute video Sharon Holland IHM shares insights on issues of governance in religious institutes when membership declines and plans for moving forward are being made. Holland recognizes that many institutes have already made changes in transferring oversight of ministry and finances to others outside their institute, while less has been done in the possible adaptations in governance. Her presentation looks at the history, practice, canon law, and constitution requirements, while sharing current and possible adaptations for governance when an institute no longer has sufficient numbers or competent members to perform this function.

MAJOR POINTS

Mission underlies whatever is being planned for the institute. “The building of a united community in Christ in which God is loved above all things and the mission of Christ is generously carried out” is the purpose of the institute, and every member contributes to this mission. Even the elderly contribute by their prayer and suffering. Questions to be considered when looking at governance issues: What happens when the institute can no longer call a chapter? What do the constitutions say or require about government? Can these be changed? How much structure and how many persons are needed to govern? Can terms of office be extended? Number of councilors? Who could serve on a consultative body or council? What parts must still be handled by the general government? If international, how can an institute overcome language barriers? What adaptations are already being tried by institutes? What is the role of the Holy See, or, in the case of diocesan institutes, of the bishop? Mergers and unions seem to be a thing of the past and are not being suggested today. In an institute’s final days, spiritual animation may be one of the final goals of the leadership of the institute, with all other areas being handled by others (ministry oversight, finance, final disposition of
assets, living space or housing for the members, etc.). How the institute ends may be the way it began – borrowing help from other institutes and persons for what the institute itself cannot provide. It is most important that members choose to be joyful and prayerful as we go forward!

**PRACTICAL APPLICATIONS**

In the final section of the video Holland speaks of the creative solutions that are already being tested by some communities. It seems that CICLSAL is beginning to understand the questions being asked by religious institutes today. The concept of a “commissary” was suggested by Holland as one way to govern that institutes could pursue. This person (not always a religious, but preferably a woman religious from another institute) would be named by the Holy See to hold the authority for the institute that has requested a commissary. Members within the institute could form the council or consulting body. Some “autonomous houses” could become the “official juridic person” or civil corporation to handle certain matters but would not be responsible for chapters, formation, travel, etc.

**GREATEST VALUE? FOR WHOM?**

This information is very timely for both leaders and members. It comes from a person who has been involved in all the forms of governance that have been tried, are being tried, and even might be possible solutions for the future as religious institutes move forward in hope toward their completion.

**MAJOR POINTS**

1. “Transformed to a New Way of Being” is a 47-page Word document that describes how the 2007-2015 FSM leadership teams identified and responded to challenges in their congregation. Part 6: Collaborative Governance Project (29-32), which deals with the genesis and development of the CGP, is of particular relevance to our initiative.

2. FSM and CPPS leaders designed the CGP with the assistance of canonist Kelly Connors. They drafted statutes and bylaws outlining the rights and responsibilities of the participating congregations, the role of the Members, the method by which additional congregations may join the CGP, etc. (see: CGP Statutes 0323315.doc).

3. The CGP will be a civil, not a canonical, entity and as such will not require CICLSAL’s approval. Nevertheless, the leaders asked Connors to go to Rome to inform CICLSAL of their plans. CICLSAL staff offered minor suggestions but had no objections to the overall concept of the CGP (“Transformed” 31).

4. The structure of the CGP is similar to that of a sponsored ministry, with Members, a Board of Directors, and administrative personnel coordinated by an executive director.

**CONCEPTUAL SUMMARY**

These documents taken as a whole provide a template for the kind of entity the Wisconsin Religious Collaborative is hoping to create. In November 2013 the Franciscan Sisters of Mary (FSM) invited the Sisters of the Most Precious Blood (CPPS) to explore options for a shared governance structure. The result of their deliberations is the Collaborative Governance Project, which they are just beginning to implement.

**26. “COLLABORATIVE GOVERNANCE PROJECT” BY KELLY CONNORS PM & ROSE DOWLING FSM**

This review is not of a single work but of the collection of documents provided to the Wisconsin Religious Collaborative Working Group by Kelly Connors PM and Rose Dowling FSM concerning the Collaborative Governance Project (CGP) entered into by the Franciscan Sisters of Mary (Bridgeton, MO) and the Sisters of the Most Precious Blood (O’Fallon, MO). These documents include: (1) “Transformed to a New Way of Being,” (2) CGP Statutes, Organizational Chart, and Explanatory Notes, (3) Job descriptions for the CGP’s Chair of the Members, Board Members, and Five Directors: Executive Director, Finance Director, Communications Director, Health Care Director, and Spiritual Care & Community Life Director.

5. The elected leaders of the religious institutes continue to direct the work of the CGP as long as they are able. When an institute can no longer supply its own leaders, it will ask its ecclesial authority to appoint the Chair of the Members (a religious) as its commissary (see: CGP Chair of the Members.doc and CGP Explanatory Notes.pdf 3).

**PRACTICAL APPLICATIONS**

The CGP model “ensures the autonomy and decision making capacities of participating institutes” (Connors, CGP Explanatory Notes.pdf 3). Decisions are made by the institutes, and the CGP carries out those decisions. Even when an institute is no longer able to elect its own leaders, it continues to appoint Members to the CGP as long as it is able. This principle of safeguarding the autonomy and wishes of participating institutes is one we can expect that institutes in LCWR 9 will also regard as essential.

**GREATEST VALUE? FOR WHOM?**

Congregations exploring the possibility of collaborative governance will find these documents helpful for their clarity and richness of detail. The CGP statutes and bylaws provide a place to start – without reinventing the wheel.

**OTHER COMMENTS**

The CGP is a collaborative effort of two religious institutes, whose needs and levels of commitment initially appear to be roughly the same. In this sense, the CGP appears to be a less daunting initiative than the structure we are attempting to create, since we are dealing with a variety of congregations and assuming that levels of participation will vary based on need.