

**Second Meeting of Provincial Treasurers of the CM**  
Casa Maria Immacolata – Rome 4-9 November 2002

*Chronicle*

*by Hugh O'Donnell, C.M.*  
*Province of China*

**Basic Foundations**

The first day evidently has been designed to lay a broad and solid foundation for the work of the days to come. The Gospel of Luke today at the Eucharist gave us the evangelical challenge of inviting the poorest of the poor to our tables, which symbolically went to the heart of the matter. Fr. Robert Maloney presented four fundamental convictions of St. Vincent and nine principles of responsible stewardship drawn from the Constitutions and Statutes. He added a few comments touching on sensitive matters, stressing in particular the need personally to accept responsibility for the oversight and decisions involved in the office of provincial treasurer. The confreres were left with the impression of how solid and rich our tradition is in the important work of administering the patrimony of the poor. Fr. Elmer Bauer then shared with the confreres the broad lines of his responsibilities as Treasurer General. His sharing on the International Missions was especially specific and enlightening. He added five practical suggestions, which touched on real life situations in the province.

The afternoon's presentation by Fr. Philippe Lamblin emphasized the spirituality that is integral to the work of the provincial treasurer. He used Martha and Mary to reveal the dynamic poles of the treasurer's incarnational challenge. He then showed how concrete were the questions which Vincent addressed with Mathurin Gentil who was the first treasurer of Saint Lazare.

**Investments — Finance Committee**

The presentations by Brother Joseph Hess in the morning and the panel in the afternoon were clear and stimulating, based as they were on the actual experience and performance of the four provinces represented. The discussion groups and the general sessions revealed large differences among the provinces. Some provinces invest in the market, have well developed structures and procedures and rely on the advice of experts. Quite a few provinces have alternative investments principally in real estate and rental properties. Some provinces are able only to meet current expenses and perhaps also depend on support from the Curia, other provinces, funding agencies or benefactors. This last group was encouraged and challenged to begin to set something aside for future needs, no matter how modest the sum. These provinces also wondered

about the possibility of investing as a group through the Curia in Rome. Fr. Bauer said this possibility already exists.

The afternoon presentations by Frs. Cyril Mbata, Stefano Angiuli and Bernard Meade on the role and function of the Finance Committee seemed to address a vital issue for the provinces and were met by evident appreciation. The scope of the Committee's responsibilities and the mode of operation seemed especially useful.

Brother Hess ended his presentation in the morning by highlighting the importance of diversity in investment strategies. The events of the day underlined the correspondingly diverse situations of the provinces themselves.

### **Accounts — Reports**

The theme for the morning was “Record Keeping, Accounting and Accountability” presented by Fr. José Luis Fernández. Each confrere received a booklet that corresponded to the presentation and can be used as a handbook and guide at home. The material as presented was thorough and professional.

In the afternoon Fr. Meade explained the *Provincial Report to the General Curia*, which was followed by discussion in language groups. The Report has a chart of accounts that is considered realistic and appropriate to the situation of the provinces. There was a full discussion of the use of software programs for bookkeeping, accounting and reporting and how to introduce and use them effectively. Some have used software programs that are set up to relate closely to the demands of the annual report to the General Curia. The experience shared by the participants seemed to have been very helpful.

### **Health Care/Retirement Issues — Relationship with the Visitor**

The schedule was adjusted for today, so that the two presentations planned for the day were made in the morning to free up the afternoon for visiting Rome. Fr. Victor Groetelaars presented the experience of the Dutch Province on the topic of “Health Care, Social Security and Retirement Issues.” The Netherlands has excellent social and medical insurance programs available through the government on condition of paying the premiums. The Dutch Province has a distinguished mission history and they care for the missionaries returning from these missions as well as for the confreres living in Holland. In collaboration with the Daughters of Charity, the Dutch confreres have renovated their old seminary to care for elderly and sick Vincentians and Daughters. In this facility they are also able to provide temporary care up to a total of 600 days. They recognized the problem they would face with their aging population and early on took up the challenge. They worked creatively and steadily to provide for the

elderly and returning missionaries and in this way have set a standard and example for others. The discussions which followed in small groups showed the by now usual difference between young and old provinces. This question is not yet an immediate and pressing concern for the younger provinces. Notable in the reports was the theme of resistance to retirement and to entering houses and facilities provided by the provinces for sick and elderly confreres.

At the end of the morning Fr. Jaime Vergara presented the theme of the Relationship of the Provincial Treasurer with the Visitor and his Council. It is clear that the Provincial Treasurer has a proper office and is not just a vicar. He is responsible for the administration of the goods of the province. The Visitor certainly is the one ultimately responsible for the well-being of the province and for the decisions that govern the province. Communication is essential and so is mutual trust. In the discussions that followed, the informal reports indicated general support for a *Practical Guide for the Provincial Treasurer*, but there was also a consensus that most of the work may already be done by other communities and they should be consulted. There is some feeling that the treasurer should be a member of the council, but if he is not he should be present for all important decisions. No serious difficulties between the treasurers and Visitors surfaced in the informal evaluation.

### **Applying for Aid — VSO**

Brother Allen Sherry FMS was invited as an outside expert to address the theme, “Applying for Aid, Fund-Raising.” He is the Director of the International Bureau of Solidarity as a service to the Marist Brothers Worldwide. His expertise and fraternal openness in sharing his experience and suggesting practical guidelines was met with enthusiasm on the part of all. He particularly emphasized two points: first, be realistic, recognize and accept the procedures, guidelines and peculiarities of each donor, because they have the money which we are seeking; and, secondly, be aware of the crucial importance of communication, personal relationships and ongoing contact with the donors on the progress and status of the project.

Against the broad background of Brother Sherry’s presentation, Brother Peter Campbell, whom Fr. Maloney recently appointed as Administrator of the Vincentian Solidarity Office, presented the reason for establishing the VSO and explained the procedures and guidelines it would follow. It will also have its own website. Its purpose is to help poorer provinces obtain funding for specific projects from donor agencies. In this regard Brother Peter identified the operational criteria for submitting projects. English is the language to use in submitting projects and in subsequent communications. The interest level among the treasurers indicated that this is a needed and timely initiative.

In the afternoon Fr. Bauer explained how to understand the report he sends to each province, including the key concept that a positive total on the report indicates what the province owes and a negative total on the report indicates the amount credited to the account of the province.

### **Local Treasurers — Provincial Patrimony**

Fr. Marceliano Oabel's presentation on the theme, "The Relationship between the Provincial Treasurer and the Local Treasurers and the Formation of Local Treasurers" was clear, concise and thorough, and was backed up by an impressive PowerPoint presentation. He said that the provincial and local treasurers share the same vision of "involvement," namely, a provincial commitment to the integral liberation of the poor, which led them to a sense of managing the goods of "their masters." Formation of local treasurers takes place on a regular basis and is complemented by training high school graduates as bookkeepers. This has been a valuable initiative for the province and offers a model to others. From a relational point of view, Fr. Oabel emphasized the value of *listening, witnessing and care*. In the small groups confreres mentioned difficulties in two areas in particular: receiving surplus funds from the houses and receiving reports on time. Regular communications with the local treasurers and a pattern of consistency have helped provincial treasurers in some provinces. In general, there was a sense of ongoing and significant progress wherever the provincial treasurer communicated regularly with the local treasurers.

In the afternoon Frs. Philip Robson and Roberto Lovera spoke on the conservation and alienation of patrimony. Each spoke of the development and care of the patrimony of his own province. It was clear that the unique history, the decline in vocations and the changed actuarial situation of each province have given prominence, if not urgency, to the question of patrimony and underlined the pressing importance of attending to the patrimony of the province. Key elements mentioned were: actuarial studies, a board with professional members, care of all relevant documents, a strategic plan and renovation of buildings to insure income. Attention to patrimony and its central importance for the future mission of the provinces and Congregation has moved to the center of community consciousness in recent years and this afternoon's presentations gave patrimony increased importance. The following discussion was lively and interesting. In particular the issue of the historic patrimony of the Congregation as contained in letters of St. Vincent and other invaluable documents (which are sometimes neglected, sold or lost) was raised. Tangentially the crying need for attention to the documents in the Archives in Paris was touched upon as perhaps a responsibility of the whole Congregation.

The final session dealt with evaluation and recommendations. The participants and organizers were all thanked for their contributions to the success of the meeting.

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