

## **Managing Communal Commitments: Models and Mergers 2023 CMSM Post-Assembly**

### ***Summary Notes***

*Fr. Frank Donio, SAC, introduction:*

The focus is on “models and mergers” because many communities are recognizing - see CMSM’s CARA study - that communities don’t have the personnel to do the same things they have historically done. But, there is also a recognition that the old ways may not be the best ways. In the models section, we will have three speakers discussing ways people can closely collaborate in mission.

Mergers. Unlike many of the women’s communities, men’s communities are still going through mergers, and not just in the US. These mergers may include areas outside the US and/or larger entities that are recognizing it’s time to come together. International communities are also influenced by generalates that may give a prompt to look into merging. In contrast, women’s communities do not necessarily do this, but are focused on completion, which will pick up pace in the next few years.

### ***Models Panel***

*Fr. René Constanza, CSP - Paulist Lay Leadership Board*

I will speak about lay leadership - how do we involve laity? This discussion started with our general assembly where we had strong input from members who wanted more participation from laity in governance. Some wanted women in our general council; others suggested we have them at our assembly. We settled on having a Paulist Lay Leadership Board (LLB). This advises the leadership of the Paulists. It is comprised of laity representing areas the Assembly decided were priorities. That was the Assembly’s direction. But it was the President’s board that was tasked with making it happen.

The LLB was started this past January [2023]. We are learning as we go and we continue to evaluate it. What were we looking for? 5-8 people that come with a strong background in the particular areas of focus for the next four years. LLB would also be diverse - women and men, but also diverse points of view - it is easy to get people who think like us. Also, it’s good to have people engaged in evangelization, media, women and leadership, and at the peripheries.

Ended up with three women and two men - all five had a pastoral interview. As President [superior general], yes, I have to manage resources and so on, but first and foremost I have to seek what’s best for the brothers. Hence the pastoral, relational aspect was very important. We also wanted the five to represent areas where we may be weak. I come from a background of administration and management, so I need people in the LLB to be strong in the areas of

relationship/empathy, reminding us it's first of all about the people, rather than finances or similar.

So how do we engage with the LLB? We are still in the experimenting phase and will evaluate in December. We meet quarterly, usually a week or two before the General Council meets. This helps us to know what resources and ideas we need and so they can engage their networks to help us with issues. So this is our model, how we include lay voices in our governance.

*Fr. David Colhour, CP - The Passionist Family*

Thanks to Fr. René - some of what he said is similar to what we do in our province. Our model is incomplete and in development, but it started 20-25 years ago. Our province's primary work is retreat centers, and so we started asking whether we need only ordained men in retreat work. We don't. So started inviting others, such as people with MDivs, CEOs and so on who aren't ordained.

Now we have a whole group of laity who have been living the charism, who consider themselves Passionists and have asked to be heard, and we consider them to be filled with the charism.

Charism is not just a gift, but a verb - it belongs to the Church, not just the community, and can inhabit anyone.

About 12 years ago we started a process called "appreciative inquiry." More and more laity got involved, asking how to partner with us and ensure our future is bright. We tried many models and wanted it to grow organically. We found ourselves diminishing in ordained members and growing in laity - the Passionist Family.

So how does a provincial council, designed to deal with vowed members, deal with a charismatic family? Lay people have grown into ownership of the charism and apostolate - they said they "wanted a place at the table," which shook some of the vowed members up. The laity had new ideas. So we asked how we do this? We responded by creating an extended council, starting with three people. When we invited them to council we started to listen to each other differently.

How do I listen to the voice of a woman in the Church who feels like she doesn't have rights? Experiences like that change the way we see ourselves and work together. Laity does not have a canonical voice. But when it comes time for bigger questions, we allow them to vote. For issues dealing with the Passionist Family, they vote.

We have grown in racial and cultural diversity, which challenges us. We have also struggled with *Laudato Si'*, which is asking for change and to embrace the poor; it is easy to minister to the middle class.

We hope the synodal church we're being called to by Pope Francis is developing organically across the province, especially in this extended council. Charism is the very heart of where we started; laity call for more and more formation. It is a joy to share charism, because when we teach someone we learn it ourselves.

*Tom Southard - Christian Brothers Conference*

The Christian Brothers Conference (CBC) is the regional office of North American LaSallians - prior to me, it had three different directors, each with different responsibilities, but that changed to better unify the work of the conference when I joined.

At one point in our recent history, large numbers of non-consecrated men and women were leading ministries. In France, leadership saw the diminishment of the power of the brothers. So the next general chapter wanted the brothers back in, non-consecrated out, etc. In the 1970s we were at the highest number of brothers - 2700 - now at 500 in North America, which is a significant change.

With that diminishment, there is this idea of sharing the charism. So I want to talk about lay formation and sharing the charism.

We have about 500 brothers in ministry and about 10,000 LaSallian partners - ranging from CEOs to janitors. This number is wonderful, but we have just sort of called everyone partners. What about their formation? So, we came out with a handbook for formation. Everyone should be able to find themselves in it and chart their formation. Starts with induction, belonging, commitment, co-responsibility, and ends at wisdom (from [The Pilgrim's Handbook](#)).

We started talking about formation for ministry; this helped us understand how to work with partners better.

We also provide formation programs that partners can enroll in. But we depend on them going back to their ministry and being engaged as partners. Buttimer Institute is a 3 year journey over each summer. Johnston Institute is a 2 year cohort model, where people can think about the documents of the institute and put it in the context of working with brothers. These programs used to be all brothers; now there's just a few per cohort.

Administrators of LaSallian ministries have started insisting that partners go through formation - if you don't understand what it means to be LaSallian, you aren't going to run a good LaSallian institution.

We have also changed governance models to better engage partners. We started mission councils for each district [province], which have to be composed primarily of non-brothers. They advise on mission and ministry, anything except the life of the brother.

A number of mission council members were invited to our general assembly in 2020, where they provided wonderful ideas and a number of their points were taken up. This invitation is now being made more permanent as they will meet with general leadership twice a year.

The local district and mission council hold meetings together and vote together except for canonical matters. Because of this, lay leaders feel valued. They own being LaSallian partners. Ministries have grown. Despite diminishment of brothers, we have added 12 new schools, because we have been able to engage lay partners.

An issue has arisen. Partners say something is missing: sharing in the charism is good, but spirituality is missing. They have said they need better instruction on this. We are creating a spirituality group in the Conference to better understand the founder's spirituality and how to apply it when not living in community.

#### *Initial large group Q&A*

Q: What do you communicate to potential lay partners about time commitments? *Colhour*: We are trying to figure out the structure. Lay people said no structure is needed; they don't need induction and resist formalized structure. *Constanza*: From the beginning we said the LLB is a working group; we need a group who understands who we are. We meet with them quarterly, a week or two before. *Southard*: Each mission council meets three-four times a year.

Q: Can you give a specific example where advice of laity has steered you in a different direction? *Constanza*: The discussions around the decision to leave foundations. The LLB was good at giving us resources on this; also very helpful in networking us with good resources. *Colhour*: Migration committee. When migration problems began, 4-5 people were big on it, but we couldn't commit vowed people - so the laity said they'll do it themselves. So now we have new ministries.

Q: Many communities are 1-50 members. Can these structures work with small communities? Do you do this on the local or national level? *Southard*: Most of our partners work in schools. Structures work to bring them together to engage on ministry. Works for us - others have tried, but it doesn't work for them. Each needs to find their own model that works. *Constanza*: What we do could work for a community of 50 - but depends on the reality of each community and where you need assistance. We meet via Zoom - come from different parts of the country, which is very efficient.

Q: Passionists have retreat centers; LaSallians have schools; what is the attraction of an extended governance structure for the Paulists? Sounds like the Paulists also wanted this rather than vice versa. *Constanza*: Our charism, the way that we evangelize. We emphasize that people belong, and that sense of belonging helps. Media helps too. Do have associates, but they don't help with governance - the LLB does.

*Donio*: 15 minutes of small group discussion - What are your models, especially around governance, especially around councils? What do you use or are considering?

*Large group sharing:*

- Q: Can Tom Southard comment on board membership? Not governance, but who gets on boards and what do they do? *Southard:* We have 95 ministries that need boards - some need a certain number of brothers, but now have started to change that to “qualified LaSallian,” which is hard to define and thus a big problem. So, we have decided it’s really at the decision of the provincial. We are now six years into this process. For a while we had brothers who only did board work and eventually asked if that was the right way to go. So, we decided that if you’ve done a certain amount of formation, that makes you a “qualified LaSallian.” We don’t have associates; some ask for that. Other countries have fraternities; don’t want that in the US. “Qualified LaSallians” is working but needs to be revisited.
- Q: What do you admire from the other models that you don’t have?
  - *Colhour:* Haven’t ever imposed another model - it’s growing, in flux. One of the issues we have is the replacement of lay people on the extended council, which can’t be a popularity contest. Instead, it has to be a discernment process.
- Q: How do you help people understand charism and spirituality?
  - *Colhour:* one of the benefits of COVID was Zoom. It forced people to stop thinking in silos. We started to understand that all locations belong together as a province and to think that way. We started doing educational pieces. This has helped us in formation.
  - *Constanza:* I’m taking from this discussion the importance of formation. All of us are in need of ongoing formation.
  - *Southard:* We have set, standard formation programs. We surveyed partners; they told us spirituality was important. We also found out some things that might have otherwise been hard to believe, such as: women didn’t feel belonging in the charism the way men did. About 40% of partners are women - but weren’t fully engaged. Ran programs specifically for women to address this. Hearing from the partners is so important for the brothers to hear; it creates room for change.

### ***Mergers Panel***

*Donio:* Some communities are still navigating ramifications of mergers from 25 years ago. Just because something comes together does not mean there’s still not lots of work for successors in leadership many years later.

*Fr. Jeffrey Kirch, CPPS - Missionaries of the Precious Blood*

Missionaries of the Precious Blood came to the US in the 1840s. By 1960 we had grown to 600 - by far the largest region in the congregation. So, in 1965 we decided then to split into three provinces, which was a five year process. We lost lots of members almost immediately because of the times.

When we went to merge back together, there was still lots of knowledge from when the province was one. The older guys were all formed together and knew each other. All formation was still done together. All went to CTU. There's a lot of sharing - shared ministry, personnel, lay associates. You would think that this would make coming together easier - but it didn't. Over 50 years people came to think that each province was completely different, with different cultures.

Efforts to come together started in the 1990s. Our moderator general emphasized "re-foundation." At the time there were three provinces in the US, and the merger process was first spurred by the need of the Pacific province to merge because of financial difficulties, but it didn't happen. We started again about 12 years ago and designed a process - gathered to talk about mission, spirituality, and so on. When I was elected, within a year the other province had a new council and all said they didn't want to be in leadership, but got elected anyway. This created problems - other leadership didn't necessarily want to come together or have skills to help with the process. Personalities of the leaders matter in this process. Some wanted to wait until we knew each other better. I argued we do relational work while working on nuts and bolts. Eventually, we got to the point where both assemblies voted to come together, overwhelmingly. COVID happened in the middle of this and complicated matters.

Overall it worked out, with lots of hair pulling. Everyone is basically happy. What we had to attend to was a size difference - my original province was twice the size of the other. We had to make the point that this was a creation of something new rather than an envelopment.

Two other points of advice: you can't wait to come together until everyone is done. Business offices are still working through getting names changed on accounts. There's always something else that comes up. Second, we would be in a totally different situation if we started in 2003. We would have been younger and with more vitality. Now we again have a choice: manage our decline or make some radical changes.

*Br. Peter Zawot, CFC - Edmund Rice Christian Brothers*

I entered CFCs in 1975; we had 3500 brothers worldwide in 13 provinces; three in the US/North America. We were founded by Blessed Edmund Rice in the early 1800s and followed English-speaking immigration. We came to Canada in 1876 and down to NYC in 1906. There was one province for about 60 years; then Canada separated and then the US was divided into two.

In 2002 we started on "restructuring" - didn't want to use "merger." Provinces were encouraged to explore this process. Held three simultaneous chapters and then stayed for a joint assembly. This was the start of the restructuring process. It was well planned and facilitated. During the time of the Assembly, a committee was established that met to continue to work on what this new entity would look like.

In 2004, signed a declaration for our “common future together.” This created the US province. There was concern about the size of the old provinces and equity. Each former province elected three to new leadership.

Everyone was invited to participate, not just delegates in the restructuring process. Since the provinces split, each had developed their own culture. That had to be respected. Finances, eldercare, among other things - each had their own way.

We maintained three civil corporations despite coming together as one canonical entity.

For the older members, who had gone through together as one province, it was like a family reunion. For the younger members it was different.

Our latest buzzword is “thinking congregationally,” and we are moving toward sharing resources and personnel.

*Fr. Larry Ford, OFM - Order of Friars Minor*

Picking up on Kirch - if you're going to bring people together, you are creating something new and you have to hold that out as your reason for doing it. Many reasons can be cited - aging, ministries, etc - but we're all about conversion, about becoming something more. It's not something you have to sell, but you do have to preach it.

We took a lot of lessons from women religious, but we are different. We can learn things from others but it's wisdom, not a roadmap - you have to do it your own way based on what else you have learned.

Many people thought the women's religious orders were a roadmap, but it's not. It's something new and fits into your roadmap as something new. We have tried to stay away from “mergers” and have instead focused on “renewal,” which is part of our documents, language, and history.

Language matters - I'm a Guardian of the process - that language [Guardian] matters to Franciscans - it's a capital-G word. Picking someone to do this with a pastoral spirit matters.

Experts and consultation matters - you don't have the expertise and time to do this on your own. You need to train your consultants. You need to onboard them. You may know that we hired a consultant - hired them aspirationally - got frustrated with them. So, we had to make a shift. To bring systems together, help is required. But consultants only know about you what you teach them. We incorporated some synodality into the process. We learned you need to invest time upfront in consultants.

We work with Grant Thornton. It costs money. We also need to set some limits for what they do. Not all members will be comfortable with the amount of money spent on the process.

For a merger to work, you need to find someone to do this full time. How can we manage all this change? By having someone think about it full time.

It's important to know where you're going - what you want to do and what the vision is. Go back to the rules - canons, etc - once you know that. The Minister General said that he wanted a list of things that we needed to change in the Constitutions to make this process more friendly and easier in the 21st century.

When we changed consultants, we refocused on restructuring. Better fit for us as men - originally wanted to focus on renewal. But what we could handle was restructuring; once we started on that, renewal followed as part of the conversation.

### *Large Group Q&A*

Q: Merging is not on our radar, but I am interested in leading brothers through transitions. Practically, how do you stay connected to charism/spirituality? *Kirch*: Through our process, the goal is to live the charism better. How do we become better CPPS? Keeping that in front of us helped to keep focused on the spiritual dimension. *Zawot*: I don't leave my room without some recollection. That focus is very important as a leader. The brothers also help me to focus. *Ford*: I readily admit I struggled spiritually at times with this. I have been on the road so much, never sleeping in the same place very long. One thing that happened was that I got more comfortable talking about spiritual things in business meetings, and got more and more comfortable with the brothers and with consultants doing this. Formation at the guardian level is something we're looking at - difficult conversations, etc.

Q: Restructuring - did it have implications for local ministries, such as turf wars?

*Ford*: Yes, This has happened - people defend turf in face of change.

*Kirch*: Went into process with the attitude that everything is on the table. We have been returning parishes to dioceses slowly - people know we can't do everything. We have also made basic commitment to core ministries - but there's even more succession planning.

*Zawot*: Originally we had some territorialism - but when people started to move around different provinces and talk to each other, it brought insight and knowledge that wouldn't have been there otherwise.

Q: [to Fr. Ford] You said you "hired consultants aspirationally" - what does that mean? *Ford*: We were emphasizing renewal, spirituality and thought we could get guys to talk about it. We brought in a consulting firm who has experience with religious - supporters of *Laudato Si'* - focused on our best values of fraternity, minority, and so on - but had no infrastructure in place and everyone struggled. We had great house chapters with those consultants, but no action came out of it.



It was a very hard decision to change consultants. You have to be willing to change along the way. In this process, there's so much ambiguity - no job description - we had to figure out what we were doing.

*Donio:* Let's move to small group discussion - what fruitful practices have come of managing communal commitments?

Q: We have two provinces; one is a lot smaller. We don't seem to have much movement, and not sure how to get the process going.

*Kirch:* If you have no clear reason for merging, I'm not sure why you would do it. For us, we did get pressure from Generalate. In South America, a smaller province was formed to create room for it to grow. You need a clear reason like that for why you are changing. How does it help you grow? Improve community life? Etc.

*Donio:* Lawsuits also impact mergers. If one entity has legal problems, that often stops mergers. Sometimes this can even be taken as a form of completion.

Q: 13 years ago we merged and we would not have done it on our own without generalate intervention. He said, this is the date you're a new province and it worked.

*Ford:* This was important for us - having a date gave everybody something to focus on and made us move.

*Kirch:* Having a date is good; but not everything will be done. Work continues even after the merger.