

**XXXIV GENERAL CHAPTER  
SOCIETY OF MARY (MARIANISTS)**

**REPORT OF THE  
OFFICE OF TEMPORALITIES**

**EDWARD VIOLETT, SM**

**ROME 2012**



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## XXXIV GENERAL CHAPTER OF THE SOCIETY OF MARY (JULY 2012)

### REPORT OF THE OFFICE OF TEMPORALITIES

This written report to the Chapter will review the activities of the Office of Temporalities as articulated in the *Objectives and Strategies for Action 2006-2012*, offer information and commentary on the sharing funds administered by the Office and on the economy of the Society. A detailed financial report including a report on the investment portfolio will be given during my presentation to the Chapter.

As I recount the activities of the Office, I am reminded ever so clearly that the efforts are not singular. In order to undertake the responsibilities of the Office and to carry out the objectives and strategies with any modicum of effectiveness and efficiency one needs collaborators. And so it is with deep appreciation that I recognize and offer thanks to those who have worked directly with me in this effort over these five and half years: Bro. José Antonio Villapun, Bro. Remy Sandah, Bro. Giuliano Cortese, P. Romolo Proietti, Sig. Paolo Proietti, Bro. Michael McAward, Bro. Giorgio Arsuffi, Bro. José Eizaguirre, Bro. Ron Overman, Bro. Chola Mulenga, M. Antoine Hüe, Bro. Steve O'Neil, Bro. Robert Metzger, Bro. Dennis Bautista, Bro. Charles Henri Moulin, Bro. Tim Phillips, Fr. Charles Miller, and Dr. Steve Neiheisel.

## 1. ACTIVITIES ASSOCIATED WITH THE *OBJECTIVES AND STRATEGIES FOR ACTION 2006-2012*

### 1.1 *Actions completed, in process or initiated*

#### a. **Characteristics (principal elements) of Marianist Administration**

The idea of articulating some principal elements of Marianist Administration comes from the reality, that in recent years there has been progressive development in articulating our spirituality and the manner of our education and teaching; yet, there has been less development on administration, particularly administration associated with the Third Office.

Dr. Steve Neiheisel, a professor of Political Science with a specialty in administration and leadership, was invited to conduct the basic research. He began the inquiry and study into the characteristic elements of Marianist administration in the fall of 2007. The result of his research is a paper entitled *Characteristics of Marianist Administration* published in June 2009. This paper was distributed to the Unit administrations for discussion and feedback. It was also discussed in the General Council and in the Temporalities Committee. The paper has also been used as a resource in workshops given to school administrators as well as the leadership training programs for the brothers of the U.S. Province.

The *Principal Characteristics of Marianist Administration* that is presented as an addendum to this Report for affirmation by the Chapter is a redaction that incorporates Dr. Neiheisel 's original work and the feedback received. The aim of this document is to be a foundational articulation that would help form and inform our administrators in a broad sense, offer a basis for further amplification and for policies and actions, and hopefully be of use in crafting evaluations.

#### b. **Formation and Education Programs**

From 2008-2010, two training programs have been made available to our developing Units: Workshop for English and French Speaking Provincial Treasurers sponsored by the Association of English and French Speaking General Treasurers and Funding Workshops for Religious sponsored by the Centro Comunita Giubileo. Four brothers (France, Togo, and Ivory Coast) attended the French speaking Treasurers Workshop and four brothers (Eastern Africa, India and Bro. Remy) attended the English speaking

workshop. The grant writing workshop is only offered in English and we had four brothers (India, Eastern Africa, Philippines and Bro. Remy) attend.

**c. Re-structuring and Re-orientation in the Office of Temporalities**

**1. Personnel**

Following up on the stated objective to *“reorganize the areas of responsibility in the General Office of Temporalities so as to provide for more effective financial stewardship and administration and to allow for the Society’s regular participation in organizations (church related and secular) devoted to the promotion of justice, peace and the integrity of creation,”* the responsibilities of the Administrator were divided creating two positions: Administrator for Finance & JPIC and Administrator for the GA/Community. The appointments to the two positions were made for three years and both brothers upon completion of their mandate elected to return to their Units.

During the course of the mandate, the objective, by and large, was fulfilled satisfactorily. Our participation in both the JPIC forum and the General Treasurers association were regularized and active. The care for the temporal needs of the house was re-ordered and suitably administered. The accounting and personnel administration remained challenges throughout the mandate partly due to experience and training in these areas as well as the complexity of labor laws, legal requirements, and personnel difficulties.

In the summer of 2011, the two positions were once again brought together. With the generosity of the Province of Italy, P. Romolo Proietti was made available for the position. With a sense of service he gladly accepted and was appointed to the role of Administrator. Sig. Paolo Proietti has also been hired for several hours a week to assist with the practicalities of the financial accounting.

While understanding the limits of our personnel resources in the Society, it is clear that, as in the past, having Marianists available to work in the GA is a great advantage for the mission of the Curia as well as for the community life of via Latina. Going forward, it would be helpful to identify those brothers who would be willing to be of service at the GA.

## 2. **Financial Accounting**

With the aid of Bro. Robert Metzger of the Province of the USA, a new chart of accounts was developed in line with European/International accounting standards. The new chart recognizes the discrete operation areas of via Latina: the General Administration (Curia), the “House” and the Community, as well as separates out the Seminary. New multilingual accounting software was installed and with the assistance of Fr. Charlie Miller, we were able reconstruct the data into the new format so as to have a common financial picture of the GA from 2006 forward. This revision has allowed for a better financial picture of the GA as well as facilitated a better budgeting process.

Along with the financial accounting revisions, Bro. Metzger was able to help us develop a cost accounting process so as to better understand the room and board costs of the Seminary. A separate report on this will be made during the Seminary presentation.

With the changes to the civil recognition of the GA in Italy, as well as the changes in the functioning of the I.O.R. (“Vatican Bank”), further changes were made to the financial accounting system in 2011. These modifications recognize books of accounts that correspond to the “Curia” (with operations in Italy), to the “Society of Mary” (non Italian operations) and to the Seminary.

## 3. **Investments**

Our investments are currently managed by Morgan Stanley Smith Barney (MSSB, San Antonio, Texas), Pax Bank (Köln, Germany) and by OIKO Credit (Amsterdam – Social Responsible Investment).

Beginning in 2008, in consultation with the Temporalities Committee, the investment portfolio has been re-oriented to conform to a more conservative outlook whereby we would have no more than fifty-sixty percent of our assets invested in equity or equity-like instruments. The remaining portion of the portfolio would be invested in very “high” quality fixed investments. In tandem, a spending rule was implemented to conserve earnings and to help rebuild the corpus of the portfolio. The spend rate is set to a range of three to four and a half percent depending on the earnings and needs in a given year.

**d. Implementation of the General Finance Directory (GFD)**

At the writing of this report, four out of five Provinces and nine out of eleven Regions have established or revised a Provincial/Regional finance directory based on the GFD as part of the Directory of the Province/Region or as a standalone policy document.

The General Council in line with the GFD has established the Temporalities Committee of the Society. The members include Bro. José Eizaguirre (Province of Madrid/Spain, term ended May 2011), Bro. Ron Overman (Province of the U.S.), Bro. Chola Mulenga (Region of Eastern Africa), and M. Antoine Hüe (Province of France). The Committee has met annually since 2008 and has been a valuable resource for assessing the investment portfolio and finances of the GA.

In Section IV, Properties of the Society and their Administration, the GFD details the manner in which we comply with the *Rule of Life*, as it directs our acquisition and administration of our temporal goods, as well as how we observe ecclesiastical law with regards to these goods. Specifically, this section provides direction about how our goods are owned, the specifics of ordinary and extraordinary administration, the competent authority in this administration, the structure of permission, and direction on alienation of property and stable patrimony.

Taken together, the directives as stated in the *Rule*, in the GFD and in Canon Law call on us as a Society through our Chapters to establish a process of review and consent with regard to acts of alienation of property and extraordinary administration at the Unit level and a process of review and consent of Unit level acts at the General level. However, the 2006 Chapter did not explicitly formulate a mechanism that would initiate the process of review and consent.

So, in order to have an experience of what this might entail, in 2008 the General Council approved a set of provisional limits (maximum value for a single transaction) for acts of alienation of property, acts which jeopardize the stable patrimony and acts of extraordinary administration for the Society of Mary as well as forwarded the limits of the Congregation (CIVCSVA) whereby recourse to the Holy See would be required (acts of alienation). These limits were reviewed and discussed at the General Leadership Assembly (GLA) in 2009 and the Assembly agreed to comply with the provisional limits as well as encouraged an addition to the GFD that would

define the mechanism to set these limits. The proposition in this regard is at the end of this report.

In tandem with the property alienation and extraordinary administration study, a survey was conducted to solicit information on the properties owned across the Society. For the Units, the survey served as an impetus for the study of its property holdings, a review of the documentation of these holdings, where this documentation is kept, an examination of the accounting valuation (historical cost), and realistic estimates of market valuations of the holdings. The survey helped the GA to understand the property holdings in each Unit and to have a summary of the holdings for the entire SM, allowed us to understand the legal (in the civil sense) owners of the holdings and the value of the holdings, and helped update the archival record of the properties.

e. **Justice, Peace and the Integrity of Creation (JPIC)**

Over the past five years we have been well represented at the JPIC Forum of the USIG- International Union of Superiors General (women) – and the USG – Union of Superiors General (men), the organization in Solidarity with Southern Sudan, and with SEDOS (Service of Documentation and Study on Global Mission) by Brothers Tim Phillips and Remy Sandah.

Activities and resources to promote JPIC have included the Advent reflection booklet, *Praying with the Prophets for Peace for Peace and Justice*, the Lenten program of reflection, *40 días con los 40 ultimos*, produced by the Province of Madrid (Spain) and Fundación SM, annual prayer for peace, resources for initial formation (*Millennium Development Goals* by Caritas International and the *Compendium of the Social Teaching of the Church*).

In 2002 the World Council of the Marianist Family (WCMF) established the Marianist International Volunteers (MIV/VIM). Under the enthusiastic and able direction of José Luis “Perico” Pérez, over the years twenty three women and men were placed in works throughout the Marianist world. Many of these “works” were associated with the Society of Mary and the volunteers associated with our institutions. In December 2010, after a through process of consultation and evaluation, the WCMF made the decision to end the program due to financial and organizational constraints. Volunteer opportunities however are still available and ongoing in bilateral arrangements between our ministries and Units.

Also with WCMF we have made contributions to the *Friday Magnificat* and will be jointly establishing a webpage listing the “justice” ministries of the Marianist Family.

**f. Sharing and Raising Financial Resources**

The 33rd General Chapter, in detailing our fraternal and financial relationships, begins by reminding us of the characteristic of the first community of Christians in Jerusalem, that of sharing resources so that no one in the community went in need. With this reflection the Chapter asserts,

*This aspect of community life challenges and calls us to share our resources so as to build, enrich and participate in the Marianist common mission. It has to be understood that each Unit is called to participate in the larger mission of the Society of Mary, stretching a little more beyond our own Units. (MM 48)*

To this end, the Chapter outlines some actions for internal solidarity (sharing financial resources, personnel, training/education programs, mentoring), external solidarity (seeking financial resources/assistance beyond the Society) and for financial autonomy in the newer Units.

Over the last five years there have been some key developments in these efforts. In Europe, two new entities for soliciting funds and providing an educational platform have been initiated. The Marianist Family in Spain (the Society, the Marianist Sisters and the Marianist Lay Communities) has established an NGO called *Acción Marianista para el Desarrollo*. The organization seeks to “support development projects in different countries and to educate in the transformation of unjust social structures.” And the Province of France, in collaboration with l’Union Lorraine, established the *Fondation Marianiste* which “aims to perpetuate the work l’Union Lorraine and that of the Marianist Family in the promotion of the human person, the defense of justice, with the education as the primary means.”

Our newest Region of Eastern Africa has endeavored to establish a permanent “development” office that would help seek funds from outside agencies for its apostolic undertakings. Likewise, the Province of the USA has provided training workshops for the brothers both in Eastern Africa and India on fund raising and grant writing. Eastern Africa has also been studying the

possibility of commercializing one or more of its properties for income generation.

In West Africa, there have been efforts underway to establish income generation projects in line with our mission as Marianists. In Congo Kinshasha a superior technology institute was established with funding assistance from the Marianist Solidarity Fund. The District of Côte d'Ivoire has been investigating something similar as well as a commercial agricultural project.

During our visits to the developing Units, the GA has given particular attention to the issues of financial autonomy, solidarity and sustainability. Our recommendations follow the GFD about "living from the work of our hands". With sustainability in mind we have concretely called for increasing our earning capacity from the local economy, tying our manner of living (in formation and active communities) as close to the local economic situation as possible, and not to overdevelop infrastructure which adds significant operating costs thereby straining a Unit's limited resources.

Solidarity between Units has continued through our sharing funds (Marianist Solidarity Fund-MSF and Marianist Formation and Education Fund-MFF) and in direct twinning relationships. The GA has endeavored to coordinate and facilitate this process between Units so as to avoid overlapping requests and duplication of efforts. Further information can be found in the sharing fund section below.

The progress in this area over the last five years notwithstanding, some significant challenges remain. First, we need to realize that there is no quick fix that will bring about financial autonomy in the short term. The process is developmental and must be reflected in policies of the Units as well as in programs of formation/education and in the development of apostolic works. Fundamentally, we need to strike a balance between our apostolic mission, life styles, and what is possible, given the overall socio-economic conditions in which we find ourselves. Secondly, as a Society, our solidarity must be one of "inter-dependence" that is characterized in sharing that leads to autonomy. It cannot and should not be a sharing that results in chronic dependency.

**g. Marianist NGO**

The Marianist NGO is an officially recognized NGO of the United Nations (Department of Public Information). Brother Steve O'Neil is the Executive

Director. The Marianist NGO is a joint venture with Province of the United States. A separate report of the Marianist NGO is provided as an addendum.

## 1.2 *Actions and or Activities that have not been completed*

The following actions from the *Objectives and Strategies for Action 2006-2012* remain unfinished primarily because, as the mandate progressed, other issues and actions became more pressing and demanded more attention. My purpose in delineating them here is that I sense they remain important enough to our life and mission that they could be considered for carry over into the next administration.

### a. **Dialogue and reflection on “Globalization”**

The objective as stated called for a reflection on how we as a Society are affected by and respond to the phenomenon of globalization. The 33rd General Chapter spoke of our awareness of becoming/being an international community in a globalizing world but, as the economic and socio-political events of the last four years have demonstrated, we indeed live in a globalized world. This General Chapter, of course, has taken up the theme of our “global sense of belonging and of mission.” Quite possibly, then, future reflections on this topic beyond the Chapter will be required.

### b. **Developing Marianist characteristics for social development ministries of the Society**

Inspired by a presentation at the last General Chapter by Bro. Ray Fitz on his reflections about what makes a social development ministry of the Society Marianist, the objective called for a dialogue on eliciting some common characteristics. As has been illustrated by Bro. José María in the recent Three Offices on non-formal education, our efforts in education outside of a formal school setting, which forms all or part of the social development ministry, has grown and continues to grow in the Society. Going forward, how we strategically inculcate the Marianist spirit and identity in these ministries will undoubtedly require additional study and reflection.

### c. **Encourage yearly actions plans in each Unit to advance the issues of Justice, Peace, and the Integrity of Creation (JPIC)**

While JPIC can be promoted to the Society from the “General” level, most of this promotion is a “generalized” view of JPIC. The practical application and implementation to advance the issues of JPIC can be naturally more effective

in local situations; and if there were plans which encouraged, and possibly coordinated action in this regard at the Unit level, the efficacy would be enhanced. It was with this idea that the objective was crafted and calls for its consideration once again.

**d. Study and encourage action plans for vocation ministry and specialized formation programs for men called to ministries in the Third Office.**

While not directly addressed during this mandate as a separate topic, this objective has been considered in the discussions and deliberations on mixed composition. The issue has also been raised with some Unit administrations during the regular course of visitations. Given our tradition, we will continually be called to attend to this critical component of our Society.

## **2. THE FUNDS**

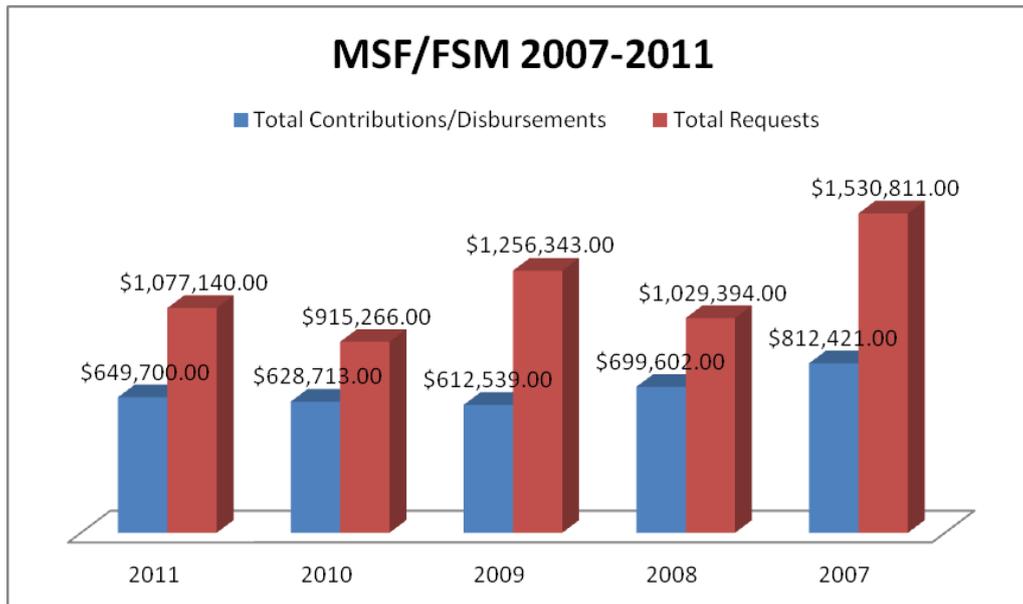
### ***2.1 The Marianist Solidarity Fund (MSF)***

The MSF has its origins in the Marianist Mission Fund for Third World Development dating from approximately 1987. The Fund is administered by the Office of Temporalities but the Extended General Council (EGC) decides on the annual distribution of the Fund. The re-articulated criteria as approved by the EGC in 2007 are:

- a. To share the financial resources of the Society of Mary so as to extend our corporate promotion of human development, justice, peace and the integrity of creation.
- b. To cooperate as a Society with persons and institutions that work to eradicate poverty in the poorest countries of the world.
- c. To support the development of Marianist ministries with persons who are poor in the new foundations of the Society.

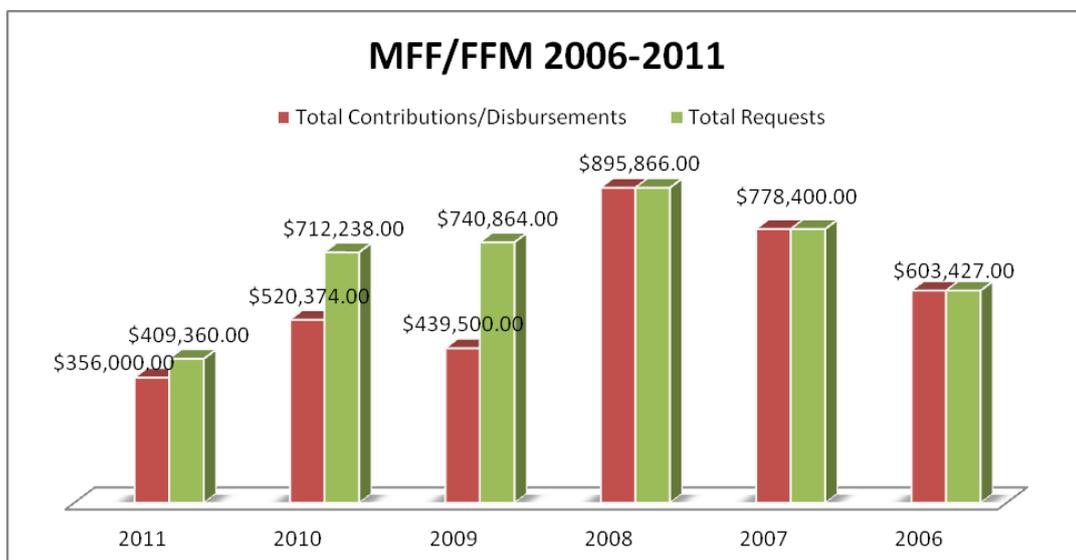
The first table below illustrates the antecedents of the MSF, and the second is a summary of the annual contributions/disbursements.

	<b>Marianist Mission Fund for 3<sup>rd</sup> World Development (MM)</b>	<b>Peace and Justice Fund</b>	<b>Marianist Solidarity Fund (MSF)</b>	<b>Marianist Solidarity Fund (MSF)</b>
<b>Dates</b>	1987 (?) – 2003/4	1986-1999	1999-2003	2003-
<b>Objectives</b>	Assistance to Marianist Religious Works in 3 <sup>rd</sup> World	Assistance to Marianist Communities/works & other causes to promote Justice & Peace	Cooperate with persons, institutions, that work in the poorest countries to overcome underdevelopment	
<b>Beneficiaries</b>	SM/FMI works not depend on the Marianist Mission (MM)	Marianist and non-Marianist Projects in any country	SM ministries especially in new foundations; Marianist Family Ministries (MF); Ministries connected to MF	
<b>Utilization of Funds</b>	Priority on new initiative	Same as goals	-Authentic Self - Development -Financial sustainability -Economic autonomy	
<b>Management of Funds</b>	Ass't Gen Temporalities, SM, FMI General Council decides	Ass't Gen Temporalities, GC Decides	Ass't Gen Temporalities EGC Decides	
<b>Sources of Funds</b>	5.5 % of Marianist Mission	Surplus + Contributions	Peace & Justice Contribution Donations	MSF + MM (4.5%)
<b>Application Procedure</b>	Through PAs	Through PAs	Through Unit Administrations	
<b>Implementation Report</b>	To PAs	None noted.	To Zonal Presidents	



## 2.2 Marianist Formation and Education Fund (MFF)

The MFF was created by the General Chapter of 1991. The funds come from the contribution of the GA (income from the portfolio), from “twinning agreements” between Units, and from Unit contributions. The funds are to be utilized for formation and education of members of the Society. Current “twinning agreements” include the Region of Austria’s support for the Region of Togo’s formation programs, the Province of Spain’s support for the Region of Colombia-Ecuador’s formation programs and the Region of Japan’s support for the Foundation of the Philippines and the Mission in China. The Horizon program has been funded through the MFF and the Charism Program of the Units in India and Africa has received partial support. The General Council determines the annual distribution.



### 2.3 *The Solidarity Fund for Haiti (SFH)*

As we know, in January 2010, the people of Haiti, and in particular those who lived in and near Port-au-Prince, suffered immensely as a result of a devastating earthquake. While our brothers were kept from physical harm, the houses in which they lived succumbed to severe structural damage, making them inhabitable.

In the wake of the earthquake and devastation, the General Council approved the establishment of a special Solidarity Fund for the Foundation of Haiti (SFH). The main purpose of the fund is to provide the financial resources necessary for rebuilding and re-establishing the Society of Mary in Haiti. The Council called on all Units of the Society to help the Foundation of Haiti rebuild itself by contributing to the Fund.

The response was extraordinary and contributions have exceeded two hundred and fifty thousand Euros. The funds are being held in a special GA bank account and the brothers in Haiti have been very judicious in the application of these funds. As of this writing, the novitiate house has been reconstructed, repaired, and furnished; there is now a rental house for the pre-novices and what was the reconstructed pre-novitiate now houses the scholastics. The former scholasticate will need further repairs and reconstruction in time.

## 3. PERSPECTIVES ON THE ECONOMY OF THE SM AND THE FINANCES OF THE GENERAL ADMINISTRATION

### 3.1 *The Global Economy*

Since 2008 the world's economy has been on a "roller coaster ride." For most of Asia, Latin America and parts of Africa this ride has been one of economic growth. For most of Europe, North America, and parts of East Asia it has been one of economic contraction and crisis. What is clear at the writing of this report is that there is no comprehensible direction and/or anticipated stability for the near term.

Pronounced economic volatility is *de rigueur*. In the midst of this volatility, I believe what I wrote in 2009 continues to be valid as we seek to manage ourselves in this era of uncertainty:

*...our Blessed Founder offers us an example of abundant prudence in dealing with financial resources. He counsels us not to live beyond our means and to keep the focus of the mission as our guide in making our financial decisions.*

*In this current economic climate not exceeding our means is the most basic and efficacious response that we can make...this entails a careful review of our expenses and making the necessary reductions to conserve financial resources, at the same time weighing what the mission requires of us and ensuring that the reductions we make do not harm our ability to respond effectively to God's call in our mission.*

### 3.2 Economy of the SM

In 2009, for my report to the General Leadership Assembly (GLA), I presented a “macro/generalized” view of the financial disposition of the Units of the SM. In this view I categorized the Units\*\* into four types: Self Financing- more than adequate, Self Financing- Balanced, Partially Dependent, and Mostly Dependent. The categorization took into account five economic elements of our life and ministry: Livelihood, Formation, Apostolic Work, Capital Expenses, and Health Care/Retirement. The table below illustrates this analysis and is updated to reflect the positions through 2011.

<b>Statistics</b>	
16 Independent Units	11 Dependent Units
7 are Self Financing – more than adequate	0 are Self Financing – more than adequate
5 are Self Financing – Balanced	0 is Self Financing – Balanced
2 are Partially Dependent on outside assistance	2 are Partially Dependent on outside assistance
2 are Mostly Dependent on outside assistance	9 are Mostly Dependent on outside assistance

Some observations from this financial view of the SM include:

- a. Fifteen out of the twenty seven Units are dependent to some degree on outside assistance whether that is from the SM (direct subsidies, MSF, Formation Fund) and or non-SM agencies.
- b. Most all of these fifteen Units “dependent on outside assistance” do not generate (and some cannot generate given the country situation and or the

stage of development of the Unit) sufficient income for their livelihoods from the local economy.

- c. Of the seven Units that are *Self Financing-more than adequate*, six have one or more dependent Units or are significantly contributing to other Units financially.
- d. We can conservatively estimate that those Units that are “dependent on outside assistance” will, in the next five to eight years, make up over a third of the members of the SM.
- e. The reality of ageing and diminishing membership are characteristics of the demographics in many of those Units that are “self-financing.” Consequently, income from “active” apostolic engagement is also declining.

*\*\*So as to include all “governance” divisions of the Society within this analysis, the term “Unit” here includes Provinces, Regions, Districts, Sectors, and Foundations.*

### 3.3 *Finances of the AG*

In February 2011 I published some further reflections on the global economic crisis. A section of those reflections was devoted to the finances of the General Administration. This articulation remains cogent as I write this report, so I include those reflections here in a somewhat modified form.

To begin, we need to recall that the GA budget is largely supported by income from the investments and from the annual contributions of the Units. As I will demonstrate in my presentation to the Chapter, the contributions form one-third of the income and the other two thirds comes from the earnings on the investments.

*Over the last two years the investment portfolio of the General Administration has seen an improvement in its market value following the more than thirty percent decline in 2008. In 2009, despite the wild swings in the market, the net return on the investments was four percent and for 2010 it was just under twelve percent.*

*With the advice of the Temporalities Committee and the consent of the General Council we moved to restructure the investment portfolio to a more conservative horizon. This process was finally completed this past December 2010. Coupled with not spending more than four and half percent of the market value of the portfolio annually, we should see modest but steady gains in the portfolio in the future, assuming that the market continues to perform well.*

*And while we have recovered some of our market value, are making returns once again and anticipate some stable growth, our finances are still delicate. The greater*

*than thirty percent decline in the market value of our portfolio that we suffered in 2008 translates into about three hundred and fifty thousand Euros in annual returns (income/revenue) lost.*

*We have been able to confront some of this annual "loss" in revenue with significant cuts in our expenses. Our expense budget is constrained by not making major contributions to the Solidarity and Formation Funds, economizing where and when possible, not funding depreciation, and by deferring major repair and maintenance needs. Because of the reductions in expenses we have just about been able to remain within a balanced budget over the past two years.*

*Despite the budget discipline and investment restructuring we have instituted, we must also recognize we have reached some critical financial limits at the GA. In terms of revenue, the GA's income is primarily derived from two sources: the returns on the investments and annual Unit assessments. We do have a revenue line in the form of room and board from the seminarians, but depending on the manner of calculating costs, at best this income is equal to expenses but in all likelihood it does not entirely cover expenses.*

*In considering income from investments, without a fairly significant increase in the corpus fund of the portfolio over the next several years, I do not see us realizing much more income for operations than the six to seven hundred thousand Euros that we now draw from the fund. Conceivably, we could see this range increase either because of market conditions or a change in our spending rule, but these increases most likely would be no more than fifteen percent. And while helpful, these increases would quickly be absorbed into those areas deferred in our budget reduction efforts. Further, a change to the spending rule beyond the four and half percent of market value, although seemingly helpful in the immediate term, in a longer outlook it would be detrimental, eventually seeing the corpus of the fund decline.*

*Looking at income from the assessments, the annual assessment currently stands at €290 per brother. It contributes one-third of overall revenues, which amounts to just over three hundred thousand Euros. The 2006 General Chapter authorized a range of assessment to €300 per brother and we have instituted modest yearly increases towards this ceiling so as to maintain the assessment at one third of overall revenues and to recognize annual increases in the cost of living. Although most all of our Units have, up to this point, been able to sustain the level of and increases in assessment, I believe that we have reached a plateau in realizing any substantial increase in this revenue line for the GA. There are two main reasons why I draw this conclusion.*

*First, the shifting demographics of the Society place the growing wealth of personnel of the Society in the developing Units. Most of these Units are financially challenged, in one manner or the other. Of those that are not dependent, two have great difficulty in meeting the current assessment requirement. It is my sense that further increases in assessment would add to the number of Units who would find it difficult to sustain the assessment rates. Subsequently, according to the current method of re-distribution of assessment reductions for the Units who have difficulty in meeting the required assessment, the economic burden would fall to the Units with aging and diminishing membership, thus creating other difficulties. Secondly, our system of assessment is based on the membership of the Society. Given our trend of overall diminishment, it naturally follows that our assessment revenue, unless radically changed to account for the decline in membership, will also eventually diminish.*

*Looking at the expense side, in our current budget regime there is little room to realize any further appreciable savings in the foreseeable future. In the last two years we have trimmed and reduced expenses by over twenty percent. This economization has helped greatly during these years, but to reduce more would risk cutting into the core functions and personnel requirements of the General Administration. The reality is that we will be required to attend to the deferred repair and maintenance needs beginning this budget year, thereby resulting in increased expenses. So, while we have reached a ceiling in savings from reducing expenses, we will need to plan for additional outlays in the near and immediate terms.*

*To confront these financial challenges, the General Council has been studying a number of options that would help us increase our revenue by either adding significant capital to the corpus of the investments and/or by developing new revenue sources. Some of the possibilities we have been studying are the commercialization of the property and buildings of the Curia at Via Latina, the location and financial structure of the Chaminade Seminary, and a new method of assessment not entirely based on membership. Because these matters are complex, involve significant patrimonial holdings and are, especially in the case of commercialization, intrinsically linked to market forces and government regulation, to date we have not reached a definitive conclusion.*

As I end this report, I am reminded of Fr. Hoffer's counsel to superiors and administrators to have confidence in God and in Mary as they take up their responsibilities and face the challenges of their offices. He quotes our Blessed Founder, Fr. Chaminade, recalling our intimate dedication to the Blessed Virgin:

*“Don’t worry yourself too much over the many responsibilities which you have. The assistance of our heavenly Patroness will not be wanting. Enjoy working for Her adorable Son and making Her known and loved wherever possible. If timidity, fear, and even diffidence enter your heart, think of the special protection with which you have been surrounded.”*

May we always remember this wise counsel especially as we consider the temporal aspects of our life and mission.

A handwritten signature in blue ink, appearing to read "Edward A. Violett, SM". The signature is fluid and cursive, with a small dot at the end.

Bro. Edward A. Violett, SM  
Assistant General  
Office of Temporalities

**APPENDIX I****Principal Characteristics Of Marianist Administration**

(This text is still in preparation. It will be sent to Capitulants as soon as it is ready)

## APPENDIX II

### Chapter Proposition as an addition to the *General Finance Directory (for "Limits")*

- 46 It is the responsibility of the Chapters at the different levels to set the maximum value of the economic activities which exceed ordinary administration. *The General Council, following the recommendation of the General Assistant for Temporalities, annually sets the maximum value of alienation or extraordinary administration by a given Unit in the Society. All such administrative action which exceeds this limit requires the permission of the Superior General with the consent of his Council.*



### Curia Generalizia dei Marianisti

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Assistant General  
for Temporalities

To: All Unit Superiors  
Unit Heads of Temporalities

Dear Brothers,

As you know the General Chapter of 2006 approved the *General Finance Directory on the Use and Administration of Material Goods in the Society of Mary (GFD)*. From previous communications you are also aware we have been working on implementing the directives of the GFD in the Society. This implementation has only been possible with your help and participation for which we are most grateful. In tandem with putting the GFD into operation we have also been engaged in organizing the mechanisms of compliance on the GA level as well.

One of the key temporal areas that the GFD expands on can be found in section IV: *Properties of the Society and their Administration*. In this section the GFD details the manner in which we comply with the *Rule of Life*, as it directs our acquisition and administration of our temporal goods, as well as how we observe ecclesiastical law with regards to

these goods. Specifically, this section provides direction about how our goods are owned, the specifics of ordinary and extraordinary administration, the competent authority in this administration, the structure of permission, and direction on alienation of property and stable patrimony.

In delineating the competent authority and responsibility for administration, the GFD states,

40 *"The Society as a whole and individual provinces [understood to include Regions since 2006] have the right to acquire, own, administer and alienate property. Other administrative units of the Society and the local community have this right only with the permission of the Superior General" (RL 107).*

45 *These acts of extraordinary administration go beyond the competencies of the treasurers and require the permission of the Superior and Council at the proper level (RL 7.57 k; 7.103 h).*

46 *It is the responsibility of the Chapters at the different levels to set the maximum value of the economic activities which exceed ordinary administration.*

Echoing Canon Law, it also describes the process of consent for alienation of property and stable patrimony:

47 *"For the validity of alienation and any other affair in which the patrimonial condition of a juridical person can worsen, the written permission of the competent superior with the consent of the council is required. Nevertheless, if it concerns an affair which exceeds the amount defined by the Holy See for each region, or things given to the Church by vow, or things precious for artistic or historical reasons, the permission of the Holy See itself is also required"*

Taken together, these directives call on us as a Society through our Chapters to establish a process of review and consent with regard to acts of alienation of property and extraordinary administration at the Unit level and a process of review and consent of Unit level acts at the General level.

In fact, in the ongoing examination of the Unit directories in light of the revised Chapter 7 of the *Rule* and the GFD, the mechanism for review and consent by the Unit superior and council for administration and alienation should be formulated and ultimately approved by the Unit Chapter. However, the mechanism that would prompt review and consent of the Unit acts at the General level was not considered nor framed at the 2006 General Chapter.

In order to advance our compliance with the GFD at the General level and to have some concrete experience of this compliance in order to be able to present a definitive mechanism to the General Chapter in 2012, I have drafted a set of provisional limits (maximum value for a single transaction) for acts of alienation and extraordinary administration for the Society of Mary. Thus, if an act of alienation or extraordinary administration is anticipated to exceed the limit provided (according to geographical area), prior consent of the General Council and permission of the Superior General would be required.

Earlier drafts of these limits and the explanation that accompanies them have been presented for review at the Extended General Council and at the meeting of Temporalities Advisory Committee of the Society. In our recent General Council meeting we reviewed the present draft being sent to you with this letter.

As I mentioned, we would like to institute the provisional limits prior to 2012 so as to have some experience of implementation before the next General Chapter. However, because what we propose is a new set of administrative procedures that will involve the Units and their apostolic works, we want to receive feedback on the draft plan from each of the Unit administrations and from the General Leadership Assembly to be held next summer.

From our discussions in General Council we are aware that there could be many questions surrounding application of the limits especially in the apostolic works. We would ask the Unit administrations to pay close attention to this aspect and conduct consultations with the directors of the works so to get their feedback as well.

As a part of your response to us please include a list of transactions of alienation and or extraordinary administration over the last 12 months that exceeded these draft limits for the Unit and for apostolic works. You may have to include a line or two of explanation if the transaction is not self explanatory. Taken together, these lists will allow us to assess actual data and make adjustments in the limits as necessary.

Please send all feedback to me by January 1, 2008.

As always, thank you for your cooperation. Know of our appreciation and prayer for your ministry of leadership in the Society.

Fraternally,



Bro. Edward A. Violett, SM

*DRAFT – JULY 2008*

## **Provisional Limits for the Alienation of Property/Stable Patrimony and Extraordinary Administration in the Society of Mary**

In this document, I outline key principles and definitions that frame our observance of the provisional limits. Sources for the principles and definitions include the Code of Canon Law (CL), the *Rule of Life* (RL), and the *General Finance Directory on the Use and Administration of Material Goods in the Society of Mary* (GFD). For a better understanding, I will use quotes from an article on alienation and administration written by Fr. Frank Morrissey, OMI, JCD, PhD. Fr. Morrissey was a consultant for us on the revision of Chapter 7 of the *Rule of Life*.

### **1. Actions Covered under the Limits**

The two areas of action with which the limits are concerned are the **Alienation of Property and Extraordinary Administration of Temporal Goods** of the Society of Mary. Alienation of property also encompasses acts (business transactions) that jeopardize stable patrimony.

#### **1.1 Alienation of Property**

The stable patrimony includes all immovable property (land, buildings), movable property of great value (religious/secular works of art, artifacts; goods that have significant historical value for the Church or the Society) and long term investments. Alienation refers to the transfer of ownership or usufruct or other acts that would “worsen” (put at risk, diminish) the stable patrimony.

In his article, Fr. Morrissey provides an elaboration of acts that constitute alienation for which prior permission is required from the Holy See if the transaction will exceed the minimum stipulated amount.

As described, these acts of alienation also constitute the acts in which prior permission needs to be sought from the Superior General and his council if the transaction will exceed the limits specified for the Society.

- *Transferring title to property to another person (for instance, a sale of land or of goods)*
- *Spending immobilized (assigned for a specific purpose) goods for purposes other than those for which they were originally immobilized*
- *Transferring or selling notable cultural works or relics*
- *Acts that could be a preparation for conveyance, such as giving a security, a mortgage, an option, compromise, or settlement*
- *Acts that subject church property to long-term burdens, such as easements*
- *Acts that establish a trust, since the goods are no longer at the sole disposition of the juridic person (however, some trusts can be established without alienating the property, provided the purposes of the trust are those for which the property was originally purchased or retained)*
- *Acts that would result in the withdrawal of Catholic identity by a bishop<sup>1</sup>*

## 1.2 Administration of Temporal Goods

The ordinary and or extraordinary administration of temporal goods is canonically regulated by “proper law,” that is, by the Society’s *Rule of Life and General Finance Directory*. For those acts deemed extraordinary, recourse to the Holy See is not required; however these acts do require the “permission of the superior and his council at the proper level” (GFD 45).

The following articles from the *General Finance Directory* define the terms of ordinary and extraordinary administration. As delineated, the acts of extraordinary administration that will exceed the limits specified for the Society require the prior permission of the Superior General with the consent of his Council.

- 43     *Ordinary administration comprises all of the economic acts and actions which are part of the everyday activity which covers the needs of life, work and mission in the Society, as well as the preservation and productivity of the patrimony.*
- 44     *Extraordinary administration refers to all the acts that, by their nature or dimension:*
- a) *modify the permanent patrimony:*
    1. *by increasing it: by accepting last wills, legacies, donations.*
    2. *by changing its nature: buying real estate, investments in the stock market.*
    3. *by decreasing it: losing by selling, donation, prescription.*

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<sup>1</sup> The article by Fr. Morrissey in which this list was published was an article written for Catholic Hospitals and Health Care Systems. While the question of maintaining the Catholic identity of a religious sponsored health care institution is immediately palpable especially in country contexts where health care is private or semi privately administered, it is also an important consideration in the divesture or transfer of other Catholic institutions such as schools, colleges and universities, retreat houses, publishing houses, and student/worker residences.

b) *or put it at risk:*

1. *by transmission of some rights on the goods: use and usufruct.*
2. *by passing on the possession of some goods: rent, loan*
3. *by giving them as a guarantee: mortgage, pawning, etc.*
4. *by assuming debts and obligations: passive securities.*
5. *by forgiving debts, by renouncing some rights.*

The following list from Fr. Morrissey serves as a helpful description of what constitutes administration and would not be considered acts of alienation:

- |   |   |
|---|---|
| <ul style="list-style-type: none"> <li>• <i>Spending free capital</i></li> <li>• <i>Transferring goods within the same juridic person</i></li> <li>• <i>Registering assets under a new title</i></li> <li>• <i>Assuming mortgaged property</i></li> <li>• <i>Transferring title for a similar title</i></li> <li>• <i>Using ecclesiastical property as collateral for a loan</i></li> <li>• <i>Making a loan</i></li> <li>• <i>Renegotiating loans</i></li> </ul> | <ul style="list-style-type: none"> <li>• <i>Selling furniture and equipment</i></li> <li>• <i>Observing the intentions of donors</i></li> <li>• <i>Curtailling property rights through negligence</i></li> <li>• <i>Refusing gifts</i></li> <li>• <i>Accepting foundations</i></li> <li>• <i>Involuntarily surrendering property</i></li> <li>• <i>Converting capital assets</i></li> </ul> |
|---|---|

## **2. Application of the Limits**

For acts that alienate property and or worsen (jeopardize) stable patrimony, the limits of the Society as well as those canonically constituted<sup>2</sup> by the Holy See apply to all “juridic persons” of the Provinces, Regions, Districts, and Foundations of the Society.

These “juridic personalities” are recognized canonically and include not only property and patrimony directly associated with the Units but with their apostolic works as well (unless an indult has been granted to an apostolic work relieving it of this requirement.)

For acts that constitute extraordinary administration, the limits of Society apply to all “juridic persons” of the Provinces, Regions, Districts, and Foundations of the Society.

<sup>2</sup> In my letter to the Unit Heads of Temporalities (March 2006), I incorrectly placed responsibility for the canonical limits with the respective Episcopal Conferences. Financial norms for bishops and dioceses do not apply to canonically erected religious institutes or societies of apostolic life. The competent authority is the Congregation for Institutes of Consecrated Life and Societies of Apostolic Life (CIVCSVA).

There are some of our works with significant (high value) economic activity that require amplified limits for extraordinary administration. Many of these works are located in our “legacy” Units and a separate set of limits has been provided in recognition of their level of economic activity.

### **3. Procedures for Permissions**

#### **3.1 For Alienation of Property:**

A petition addressed to the Superior General should include,

- the request,
- description of the act,
- rationale for alienation,
- valuations of the property (two independent valuations required) or business transaction,
- planned use of the proceeds and
- the disposition of the Unit Council.

In cases where alienation crosses the canonical limits an opinion of the local ordinary is also required.

#### **3.2 For Extraordinary Administration:**

A petition addressed to the Superior General should include,

- the request,
- description of the act,
- rationale for the act,
- planned use of any proceeds,
- financial plan (if applicable, to include projected repayment plan for loans and source of revenue) and
- the disposition of the Unit Council.

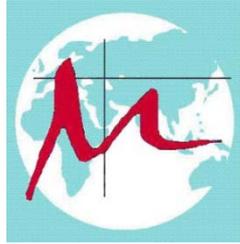
*All petitions for permission (apostolic works, Districts, Sectors, Foundations) should be routed to the General Administration through the respective Provincial or Regional Councils.*

**PROVISIONAL**  
**Limits as of July 2008**

	SM Limit		SM Limit		Holy See [CIVCSVA ] Limit			
	Alienation of Property		Extraordinary Administration		Alienation of Property			
	Extraordinary Administration		Works with high value economic activity		(CIC 1292 e 638§3)			
					apr-08			
Albania								
Argentina	150.000,00	USD	500.000,00	USD	300.000,00	USD		
Austria	800.000,00	EURO	2.000.000,00	EURO	1.500.000,00	EURO		
Bangladesh	30.000,00	USD			50.000,00	USD		
Belgium	800.000,00	EURO			2.000.000,00	EURO		
Brazil	400.000,00	USD			1.245.000,00	BRL	salario minimo	[2008
Canada	1.300.000,00	CDL			4.480.970,00	CDL	*3000	R\$415]
Chile	250.000,00	USD	500.000,00	USD	500.000,00	USD		
China	250.000,00	USD						
Colombia	150.000,00	USD			300.000,00			
Côte d'Ivoire	100.000,00	EURO						
Cuba	55.000,00	USD			55.000,00			
Germany	800.000,00	EURO	2.000.000,00	EURO	5.000.000,00	EURO	salario minimo	
Ecuador	100.000,00	USD			170.000,00	USD	*1000	[\$170]
España	800.000,00	EURO	5.000.000,00*	EURO	1.500.000,00	EURO		
France	800.000,00	EURO	2.000.000,00	EURO	2.500.000,00	EURO		
Haiti	100.000,00	USD			300.000,00	USD		
India	200.000,00	USD			10.000.000,00	Rs.		
Ireland	800.000,00	EURO			3.001.643,00	EURO		
Italia	800.000,00	EURO	2.000.000,00		1.000.000,00	EURO		
Japan	1.300.000,00	USD	5.000.000,00	USD	4.000.000,00	USD		
Kenya	100.000,00	USD						
Korea	250.000,00	USD						
Malawi	100.000,00	USD						
Mexico	250.000,00	USD			500.000,00	USD		
Nepal	200.000,00	USD						
Peru	150.000,00	USD			300.000,00	USD		
Philippines	50.000,00	USD			100.000,00	USD		
Poland	500.000,00	USD			1.000.000,00	USD		
Rep. Congo	100.000,00	EURO						
Rep. Dem Congo	100.000,00	EURO						
Suisse	1.300.000,00	CHF			5.000.000,00	CHF		
Togo	100.000,00	EURO						
Tunisie	100.000,00	EURO						
U.S.A.	1.300.000,00	USD	5.000.000,00	USD	5.341.000,00	USD		
Zambia	100.000,00	USD						

\*The limit for Spain is higher than the rest of the Eurozone to accommodate transactions of Grupo SM

## APPENDIX III



### REPORT ON THE WORK OF THE MARIANIST NGO (NON-GOVERNMENTAL ORGANIZATION) TO THE UNITED NATIONS, MARIANISTS INTERNATIONAL (MI)

STEVEN O'NEIL, SM

Catholic Social Teaching calls all the faithful to move beyond just prayer and financial contributions (although those are needed as well) to advocate with political institutions that can address the world's many injustices.

*The Church's commitment to global solidarity belongs especially to lay people. Catholics should bring their awareness of global solidarity to their diverse roles in business and commerce, in education and communications, and in the labor movement and public life. As teachers, broadcasters, journalists, and entertainers, Catholics can awaken a sense, not only of the world's problems, but also our capacity to respond. As citizens, we can urge public officials and legislators to seriously address the problems of the world's persecuted, poor, and displaced.*

(1997, "Called to Global Solidarity," Appendix A, United States Catholic Conference)

When Pope Benedict visited the United Nations in April 2008 he addressed the General Assembly saying,

*The United Nations embodies the aspiration for a "greater degree of international ordering" (John Paul II, [Sollicitudo Rei Socialis](#), 43), inspired and governed by the principle of subsidiarity, and therefore capable of responding to the demands of the human family through binding international rules and through structures capable of harmonizing the day-to-day unfolding of the lives of peoples. This is all the more necessary at a time when we experience the obvious paradox of a multilateral consensus that continues to be in crisis because it is still subordinated to the decisions of a few, whereas the world's problems call for interventions in the form of collective action by the international community. Indeed, questions of security, development goals, reduction of local and global inequalities, protection of the environment, of resources and of the climate, require all international leaders to act jointly and to show a readiness to work in good faith, respecting the law, and promoting solidarity with the weakest regions of the planet.*

The theme of this session of the General Chapter, "globalization," directly relates to the on-going work of Marianists International at the United Nations. Even our

congregational prayer in preparation for this year’s Chapter highlights the fact that the Marianists are part of a global family, **“Because we are a family, your family, help us to think, feel and work globally, motivated with one heart and one soul.”**

The Marianist Non-governmental organization at the United Nations exists as the direct result of the 1996 General Chapter. That Chapter document, “Partners in Hope,” called for,

*Having the World Council of the Marianist Family investigate the possibility of establishing a Marianist Family NGO<<Non governmental Organization>> which would allow the Marianist Family to participate at the international levels in discussions and projects of justice and peace. (P.25, “Solidarity with the Poor and Peacemakers”)*

That same Chapter was keenly aware of the growing levels of inequality and poverty in the world,

*We must seek to understand the structural causes of world poverty and to understand that local problems of poverty have structural causes which are both local and international. Solidarity calls us to collaborate with others to change and transform social institutions so that they promote the good of all. (P.41, “Discerning the New”)*

The Marianist NGO to the United Nations, Marianists International, is the result of initial work done by Bro. Javier Anso, SM, who was then General Assistant of Temporalities, in conjunction with the “Working Group UN,” part of the Justice, Peace and Integrity of Creation committee of the Union of Superiors General in Rome. The mandate for the NGO Office was outlined at the General Leadership Assembly of the Society of Mary in 2004, namely, “addressing those international issues impacting the lives of children and youth.” Our NGO Office in New York, Marianists International (<http://www.MarianistNGO.org>), was granted its official association with the UN in 2006 through the UN Department of Public Information. Bro. Steven O’Neil, SM(USA) has been the main representative of the NGO since its beginning. To date, it is jointly funded through the SM General Administration and the SM Province of the US with an annual budget of approximately US\$38K. The Marianist NGO has an Advisory Committee currently composed of five SM members and two Lay Marianists:

<b>Marianists International Advisory Committee</b>	
Bro. Stephen Glodek, USA	Richard Sroczynski, USA
Bro. Javier Anso, MA	Theodore Gorczyca, USA
Bro. Maximim Magnan, TO	
Bro. Brian Halderman, USA	
Bro. Phillip Aaron, USA	

We are looking for a FMI member and other Lay Marianists outside the US willing to join the Committee.

The daily work of the NGO office is mainly through collaborative efforts with other NGOs in various committees focused on specific issues. Marianists International regular participates in the following committees: social development, poverty eradication, family, financing for development, and human trafficking. Depending on intern availability the Marianists also cover the Working Group on Girls, migration, and the Committee on the Status of Women.

There are about 35 other Catholic religious congregations, both men and women, who have NGO representatives at the UN. The work of these committees is to influence the inter-governmental work on policy that takes place in UN system. This comes in the form of written and oral interventions at the various UN reports, meetings and conferences. Bro. Steve O'Neil of Marianists International has served on the executive team in a number of these committees. International NGOs like the Marianists are also expected to gather information from their constituents at the local level on the impact of various UN resolutions and conventions, as well as the national and local governments' efforts to implement them. This has been a challenge for the Marianist NGO Office. Any Unit leaders that have suggestions on how to improve this communication would be greatly appreciated.

The outline below gives some of the significant highlights of Marianists International's work in recent years:

- a. Marianists International publishes to its subscribed email list every 6-8 weeks an e-newsletter focusing on recent events and resources from the UN. These reports are also published on the NGO website:  
<http://www.MarianistNGO.org>.
- b. Lay Marianist, Richard Sroczynski, has been a regular volunteer associate at the NGO for a number of years focusing on the issues of financing for development and poverty eradication.
- c. Marianists International has also had a number of volunteer interns over the years. Currently a recent graduate from the University of Dayton, Abigail Lawson, is the intern focusing on issues of women and girls. There have also been interns who are in initial formation with the SM; contact Nhan Nyugen in 2009 and second year Novice Rayler Dominguez in 2008. We have also had one Marianist Volunteer from the US Marianist Volunteer Program in 2007, Cynthia Kaderli (nee Sias).
- d. **January 2012**; In preparation for the 2012 UN Commission on Social Development and member of the NGO Committee on Social Development, Marianists International has helped formulate and distribute a petition for

signatures calling for governments to initiate a “Social Protection Floor” in their country.

- e. **December 2011;** High-Level Dialogue on Financing for Development, UN General Assembly, Marianists International was one of three designated NGO speakers for Roundtable Three: “The role of financial and technical development cooperation, including innovative sources of development finance, in leveraging the mobilization of domestic and international financial resources for development.”
- f. **November 2011;** Bro. Steve wrote an article on the status of Millennium Development Goal Two calling for universal primary education for the Center for FaithJustice Blog:  
<http://centerforfaithjustice.wordpress.com/2011/12/06/educating-all-progress-of-millennium-development-goal-2-universal-primary-education/>
- g. **October 2010;** The International Day for the Eradication of Poverty (IDEP) was remembered at the United Nations on Monday, the 18<sup>th</sup> of October. The theme for this year was, **"From Poverty To Decent Work: Bridging the Gap."** Marianists International was involved in the planning of events as a member of the NGO Sub-Committee on Poverty Eradication. Bro. Steve was the moderator for the afternoon panel that focused on youth employment. Marianists International also presented a film on “Child Labor and the Cocoa Industry” to members of the International Catholic Organizations and students from Felician College of New Jersey.
- h. **September 2010;** Lay Marianists, Julie Aherne and Angela Talbot represented Marianists International at the 2010 NGO Conference organized by the UN Department of Public Information (DPI) in Australia from 30 August – 1 September. The theme was, “Advance Global Health: Achieve the MDGs.”
- i. **Spring 2010;** Marianists International hosted two students from St. Mary’s University who were attending a program organized by the Holy See Mission to the UN titled, “Freedom, Truth and Charity: Promoting Human Development as a Vocation.” MI also hosted a group of students from St. Louis High School, a Marianist school in Honolulu, Hawaii for an “alternate spring break;” where they learned about advocacy at the UN and direct service with a homeless project and a soup kitchen.
- j. **March 2010;** Marianists International, as part of the NGO Committee on Social Development, was part of a “steering committee” that coordinated a



research project funded by UN Department of Social and Economic Affairs (DESA) and examined the impact of the financial and economic crisis on NGOs and civil society. During the High-Level Dialogue on FFD, Bro. Steve O'Neil moderated a panel discussion on the results of that study with the project's main researcher, Ms. Eva-Maria Hanfstaengl.

[http://www.un.org/esa/desa/papers/2010/wp97\\_2010.pdf](http://www.un.org/esa/desa/papers/2010/wp97_2010.pdf)

- k. **January 2010;** Brothers Remi Sandah and Charles-Henri Moulin of the Marianist General Administration represented Marianists International at a two-day follow-up meeting of Catholic NGOs with the Forum for Catholic-inspired NGOs that originally met in Rome in December 2007. The meeting produced a summary document with goals and specific targets in the areas of Human Rights, Family, Health, Education, Environment & Development, and Migration. 
- l. **September 2009;** Bros. Ed Longbottom (district superior), Esteban Reyes Durán and Rigoberto Martínez Hernández of the District of Mexico represented Marianists International at the three-day DPI/NGO Conference in Mexico City with the theme, "Disarmament Now, Working for Peace and Development."
- m. **July 2009;** Bro. Steve O'Neil, SM of Marianists International and Bro. Bob Donovan, SM were awarded the National Brotherhood Award for Exemplary Ministry by the Religious Brothers Conference. The award recognizes brothers whose ministries contribute significantly to the meaning of brotherhood in the Church. Bro. Bob, a family physician, performs mobile medical treatment for the homeless in Cincinnati, Ohio. The awards were given at the National Assembly of the Religious Brothers Conference July 24 to July 27 in St. Louis.
- n. **March 2009;** Eleven college students (and two moderators) from the Marianist University, St. Mary's in San Antonio, Texas, attended part of the session of the 2009 UN Commission on the Status of Women.
- o. **February 2009;** Bro. Steve O'Neil, SM moderated a panel discussion at the UN that reviewed areas of concern within the theme of social integration and inclusion, as well as reviewed the work of the NGO Committee on Social Development to prepare for that year's Commission on Social Development. 
- p. **December 2008;** At the request of Bro. Charles Johnson, vocation director of the Marianist Province of the US, MI hosted a special meeting at the UN for a dozen potential Marianists contacts. Bro. Steve worked with brothers Brian

Halderman, Bob Donovan, Rev. Paul Landolfi and novice Ray Dominguez in planning the entire weekend for them with the focus on Marianist social Justice. The NGO portion included a tour of the UN and a panel of other Catholic NGO representatives.

- q. **October 2008**; Jim Vogt and Fr. Ted Cassidy of the Marianist Social Justice Collaborative (MSJC) and Ray Dominguez attended a three day workshop on global economics hosted by the Partnership for Global Justice, another Catholic NGO at the UN. Members of the Marianist family who attended the MSJC workshop on “Thinking Globally” (which Marianists International helped organize in May) attended the events at the UN around the International Day for the Eradication of Poverty, October 17th.
- r. **September 2008**; The DPI/NGO Conference on the 60<sup>th</sup> anniversary of the Universal Declaration on Human Rights was held in Paris. Three Marianist brothers attended for Marianists International: Bro. Charles-Henri Moulin and Bro. Olivier Glazier of France and Bro. Sandah Remy of Togo.
- s. **April 2008**; Bro. Steve was as a presenter with other Catholic NGOs at a workshop in Baltimore for the Francis Murphy Initiative on Peace and Justice to discuss the work of NGOs at the United Nations. Other Marianists from the local community in Baltimore also participated.
- t. **January 2007**; Bro. Steve and Bro. Charles Kimeu (EA) attended the World Social Forum in Nairobi, Kenya
- u. **March 2006**; Marianists International was invited to be a presenter at St. Mary’s University for the 3-day “President’s Peace Commission” with the topic “Trafficking in Humans.



I hope this provides you with a glimpse into some of the work Marianists International is involved at the United Nations and how we serve as a resource to the Marianist Family. I would like to close by listing a few ways other Marianists can be involved in this ministry and help increase its effectiveness:

- a. At least one Marianist in each Unit (such as the peace & justice coordinator) volunteering to receive the e-newsletter from Marianists International and distributing it, electronically or printed, to all the religious and lay communities.
- b. In our schools, the importance of the work of the United Nations, NGOs and Marianists International particularly could be a regular part of the curriculum. Please contact the NGO office for suggested classroom resources on various international issues.

- c. Marianists involved in various development projects, e.g., rural development, programs for street children, technical and trade schools need to communicate with the NGO Office on how they see government supporting/not supporting their work.
- d. More members of the Marianist Family could join with others in their local area and become advocates for the needs the people with government officials and then be in regular communication with the NGO Office on how national and international policies are implemented at the local level.
- e. Have more Marianists, particularly from developing countries, volunteer as interns or full time staff at the NGO Office or on the Advisory Committee.
- f. Bro. Steve O'Neil has been the Marianist NGO representative for nine years. It is time for another Marianist to step forward and assume the responsibility with a new perspective.