



Year XVI - Number 804 | 30 OCTOBER 2023

SPECIAL EDITION

MARIST NEWS

MARISTS OF CHAMPAGNAT | GENERAL HOUSE | ROME | WWW.CHAMPAGNAT.ORG

INTERNATIONAL MEETING OF MARIST BURSARS

FROM LA VALLA TO L'HERMITAGE SUSTAINABILITY, LEADERSHIP AND INNOVATION

This special edition of Marist News is dedicated to the Meeting of Bursar of the Marist Administrative Units, that took place from October 9 to 13, at Notre-Dame de l'Hermitage, in France, under the theme "From La Valla to the Hermitage - sustainability, leadership and innovation".



The meeting had the following objectives:

- Spirituality and resources: to deepen the spiritual experience that Champagnat lived from La Valla to L'Hermitage and to nourish ourselves with it.
- Sustainability of the Mission: promote reflection on the viability and vitality of the Marist mission at the various levels of the Institute.
- Strategic and servant leadership: reflect and motivate on strategic and servant leadership that promotes vitality and

professionalization in all areas of the mission ensuring the continuity of the Institute.

- Challenges, changes, and options now and for the future: to reflect and dialogue on the emerging realities of the Institute to establish horizons for the future.
- Good practices and innovation: to share experiences and processes that help the development of existing realities in the administrative units to enrich each other.



Organized by the International Council for Economic Affairs (ICEA), the meeting brought together 63 participants from all the Administrative Units of the Marist world. Brothers Luis Carlos Gutiérrez and Ben Consigli were present on behalf of the General Council. From the Economat General, together with the ICEA team, Brothers Jorge Gaio and Goyo Linacero, as well as Flavia Angi participated. Brothers José Luis Grande, Josep

Lluís Martí, Luis Sobrado and Teófilo Minga helped with the translation.



The International Council for Economic Affairs, which organized the meeting, is made up of: Alfie Custodio (East Asia), Bernard Kenna (Star of the Sea), Br. Goyo Linacero (General Economato), Ivo Cadaval (Brasil Sul-Amazônia), Br. Jorge Gaio (Econome General), Br. Lucky Paul (Nigeria) and Br. Xavier Giné (L'Hermitage).



From La Valla to L'Hermitage

Sustainability, Leadership and Innovation

Logo of the meeting

OUR IDENTITY TELLS A STORY

With inspiration, collaboration, and long-term vision, we will shape a thriving and sustainable future for Marist life, mission, and the children and young people we serve.

A 200-year legacy

The Hermitage was built by the hands of Champagnat and the first brothers, generating a spirit of hard work and brotherhood, which forged the Marist way



The connection between the past and future

A place that connects learning from the past with visions of the Future, bringing life to children and young people in diverse contemporary realities



A vision of the future

Charismatic life develops and generates new horizons and perspectives for all Marists of Champagnat



The presence of Marcellin Champagnat

Together, Brothers and lay people continue to animate the Marist life and mission around the world in a sustainable and innovative way



The spirit lived at the Hermitage generated the identity of the Marist charism of the first Brothers: love of work, a Marian spirituality, family spirit, and formation to work in schools.

9 OCTOBER

REMEMBERING THE MARISTS ROOTS AS PEOPLE FACE THE CHALLENGES

The Vicar General, Br Luis Carlos Gutiérrez, welcomed all those present on behalf of the Superior General and his Council. The focus of Luis Carlos' presentation was on the reasons for the General Administration calling the Administration Units' Bursars to L'Hermitage. Remembering the Marists roots is considered an important aspect as people face the challenges of the present and the future. Most importantly, the concept of "servant leadership" was stressed "... to promote an open and trained servant leadership to address the emerging realities of our institute and the world." These concepts were further promoted by the General Bursar, Br Jorge Gaio as leader of the Financial Team. Br Michael Green took time out of his Third Age Programme commitments, in Manizana, to introduce the participants to an

understanding of the background and operation of Marcellin in the economic and financial spheres. Br Michael's presentation titled Spirituality and economy a thoroughly researched and interesting paper presented the two major concepts to Marcellin's modus operandi, risk and prudence. A consideration of Marcellin's upbringing and an appreciation of his actions as he sought to set the institute on a solid footing advanced the participants' understanding of these two key ideas.



"I am going back to home with some new ideas on investment and management. New approach to issues and things. I learnt a lot. The results will be evidence in the future"

"This meeting was an important moment to retrace the paths traveled by Champagnat", says Brother Jorge Gaio, Econome General of the Institute. And referring to the meeting place and its construction 200 years ago, he adds, "It was not only a physical building, but all the mysticism and fraternity generated in the process, which marked that historic moment and the future of the Institute."

10 OCTOBER

SUSTAINABILITY OF MISSION

The second day of the International Meeting was opened with a prayer led by Br. José Sánchez, the Director of the Secretariat for Education and Evangelisation. After the prayer, the participants reviewed the events of Day 1 and were given the opportunity to share the strongest impressions they experienced. The final step in the introduction to Day 2 was again to examine "The Beginnings" and the resourcing issues and solutions of the early Brothers.

Br. Jorge Gaio, Econome General, gave a presentation centered on a series of videos on the changes that businesses are experiencing in the global marketplace. The groups at the tables were invited to reflect on the strategic characteristics that help organizations achieve sustainability and that can be inspirational in fostering vitality and viability. The main elements identified were: having the customer at the center; innovating and adapting to market movements and, if possible, anticipating new solutions; establishing a long-term strategic vision; qualifying the management of cost, profitability and results processes; establishing cooperation, alliances and synergies; and professionalizing management and governance.

The Matrix of Resources and Mission formed the basis of the presentation by Br. José Sánchez, director of the Secretariat of Education and Evangelization, and Br. Jorge. The axes of Vitality (Mission) and Viability (Resources) gave rise to the four quadrants: unsustainable, strategic, tatic and sustainable (Vitality, Viability and Sustainability some thoughts for reflection. 2022. Ben Consigli). Based on the article "Aministrar para la Misión" (Fernando Torres, Revista Vida Religiosa - Monográfico 2, 2020), a set of evidences was presented and on the practical experiences lived in the Marist world, always correlating with the mission, the resources and the aspects of intersection.

After the reflection at the tables, each group identified three elements that can help to achieve sustainability in the Administrative Units and also three elements

that hinder such development. These were then presented to the plenary and finally the participants identified the priorities. At the end, the priorities identified to help the sustainability process were: professionalization of management; communication and collaboration between the Economato and the mission area; integrated strategic planning; transparency in management and governance; leadership development; defi-

nition and monitoring of economic-financial and educational indicators, among others; innovation in management and education processes; advice from competent professionals. On the other hand, those aspects that limit the development of sustainability were indicated: lack of communication between the various areas; resistance to

change; need for leadership development, monitoring, evaluation, and establishment of a succession plan; absence of planning and modernization of educational and management processes; confusion between governance and management; fragmented vision; obsolete management processes; slow decision making and sometimes clinging to the past.

The afternoon focused on socializing best practices. Participants formed different groups to share and reflect on different experiences in areas related to economic-financial aspects.

The topics covered were: financial vehicles, governance and management, strategic planning, civil and canonical structures, real estate management and crisis management.



"The meeting has helped me to learn from other Administrative Unities some of the good things which have made them to be where they are and some other things which have helped them and still helping them to sustain themselves. Another important aspect is that of having having one mind and thinking as one family"

11 OCTOBER

STRATEGIC AND SERVANT LEADERSHIP

The third day had as main theme “Strategic and Servant Leadership”. During the morning, the presentations were organized by Br. Ben Consigli, General Councilor.

Br. Ben, recalling the Institute’s history, highlighted that Superiors General over the years, since 1903, provided ample evidence that challenges and crises in the Institute are not something new. The solutions applied to these crises over the generations provided ample evidence that the Marists have been, and continue to be, blessed with good leadership structures. Leadership in such situations is strengthened when the following characteristics are present: understanding, resilience, ingenuity, hope and giving heart to others and gendering confidence in promising opportunities.

During the presentations, the participants were reminded that the functions of Economic and Financial Leadership, while

"The experience helped to understand the uniqueness of sustainability not only with regard to the financial perspectives but also to the mission and life. From the point where we stand, we have the opportunity to make the CHANGE that we desire to achieve sustainability in all the areas"



having the same characteristic requirements, must be based on service to the charism, mission-focused and reliant on good stewardship. The ‘doing’ requirements of financial leadership revolve around planning, organizing, leading and controlling. It was also pointed that Servant Leadership has recognizable characteristics: listening (to both what is said and not said), empathy, healing and compassionate, awareness (of self and of the signs of the times), persuasiveness in reaching consensus, conceptualization, foresight, stewardship, and ability to cultivate followers and supporters, and a focus on building community. Br. Ben provided a questionnaire to give to the participants some appreciation of where they personally stand with regard





to Servant Leadership. It was suggested that the questionnaire might be shared with colleagues and others to allow them to provide the participants with peer assessments. Strategic Leadership focused on using the collective skills and vision to help team members and the organization achieve long term goals. The significant steps to achieving this are anticipation, challenging what needs to be challenged, interpreting data, deciding on actions, aligning others and learning. Transparency and sincerity were emphasized. The “how” requires visualizing destination, strength-based leadership (utilizing the skills of others), modelling servant leadership, and allocating about 25% of the own time to reflection and data gathering.

A final section of the morning focused on the importance of succession planning at all levels of the organization’s structure. In the afternoon session Brothers Jorge Gaio and Goyo Linacero, from the General Economato, presented the several Initiatives that are carrying on, on different sides. Among these initiatives are: the process of developing the plan for financing the life and mission of the Institute, with a view to the vitality and viability of the Administrative Units and the General Administration in the medium and long term, by means of contributions and the creation or increase of funds; joint financial investments; the mapping of the real estate patrimony, its development and creation of value; the preparation of the new Administrative Guide; the strengthening of the sustainability project in Africa and Asia; the creation and operation of international legal structures; the accompaniment of the Administrative Units and the meeting of Bursars of the Regions; the systematization process of a formative itinerary to promote management and governance.



"To know and feel the place where a great man as Marcellin gestated a great dream is inspiring. After this meeting I am a better person both spiritually and professionally"

12 OCTOBER

CHALLENGES AND HORIZONS OF THE MARIST INSTITUTE

The last day, coordinated by Bernard Kenna and Alfie Custodio, began with a review of the previous day, complemented by a video of all the activities produced by experts. The participants also reviewed the answers to the questions of the third day.

Brother Luis Carlos Gutiérrez, Vicar General, was unable to lead the reflection, as planned, due to family bereavement. The task was admirably covered by the members of the team of the International Commission for Economic Affairs (ICEA) who, using the resources Brother Luis Carlos had prepared, addressed the theme of the day.

During the presentations, participants were asked to reflect on two questions:

What do you consider to be the three most important challenges in your Province or Region?

What do you consider to be the most important options for the future in your province or region?

In the presentation, the Vicar General identified seven "tensions" that will continue to challenge the Institute: adaptation, generativity, innovation in mission, integral sustainability, structural, leadership and hope.

Each of the tensions was addressed separately. Numerous data identifying the current situation and projecting the figures into the future were presented. After sharing this information, each tension was developed under four headings: challenges, changes, options, and contradictions.

At the end of the session, the groups at the tables were encouraged to reflect on: what are the three most important challenges and three most important options for the future of the Institute, including its Administrative Unit or Region? The ICEA team then grouped the different aspects. After that, the important points considered by the participants were presented. They could then discuss and reflect in the large group.

"It seems to me that seeing the progress that is being made in each of the provinces helps us to see our own paths. It is essential to continue walking as a global family, thinking globally"



Final Celebration

The day concluded with a celebration.

The team thanked for the dedication and commitment of the Community of L'Hermitage, the workers of the house, as well as the members of the International Commission for Economic Affairs.

Br. Ben Consigli, General Councilor, addressed a few words to the participants.

He said: "It is through the dedicated work of our bursars and their teams that his mission is sustained.

The role of the bursar, often unsung yet invaluable, is not only to ensure that the financial aspects of our institutions and AUs are managed but upholds the Marist mission and allows it to flourish. The exchange of ideas and experiences during this meeting is a testament to the crucial role of the bursar and how their work directly serves the Marist mission."

At the conclusion of the 4-day meeting, Br. Jorge Gaio, Econome General, reminded the participants: "we are the face, the hands, the heart of Champagnat today in different parts of the world, in order to create hope for children and young people". And he added: "with a renewed spirit, after experiencing these days of encounter, let us continue to build

"They were days of much learning, very enriching and now I know many practical experiences to apply in my province, to unify processes in order to achieve greater effectiveness. I believe that it is vital to try to innovate in every way, with many challenges, as well as to establish long-term strategies"

a new Hermitage in the world, capable of responding to our times, with enthusiasm and audacity. Let us be able to take risks with the necessary prudence".

In the evening, to celebrate the 4 days of meeting, there was a festive dinner.



In the course of this dialogue, five essential points emerged to guide the development of the Economato at all levels of the Institute:

- **Leadership:** create formation programs that consider both the charismatic and professional dimensions, accompaniment, succession planning and cultural transformation to promote change and innovation.
- **Co-responsibility:** strengthen the processes of co-responsibility between brothers and laity to generate life in the different instances of the Marist mission.
- **Vitality and Viability of the Mission:** to establish forums and instances of collaboration so that the Economato and the different mission areas contribute significantly to the development of the mission, according to their competencies and responsibilities.
- **Sustainability, Governance and Professionalized Management:** to promote sustainability initiatives at all levels of the Institute, creating efficient legal structures and professionalizing the governing and management bodies. Use qualified indicators to support decision-making and develop strategies to improve the quality, profitability, scope and expansion of the mission, seeking to respond to the evolution of internal and external circumstances.
- **Collaboration:** promote collaborative actions at the various levels of the institute, strengthening networks and administrative bodies to reinforce the vision of the Global Family, share resources and improve efficiency processes and economy of scale.

These points highlight the way forward for Marist Bursars and their role in contributing to the development of the Institute's mission, its current and future success.

On the morning of October 13, the participants visited some Marist places: Marlhés, Rosey and Le Palais. The afternoon of this day and the following day were dedicated to regional meetings.

BEST PRACTICES

DURING THE MEETING OF BURSARS, THE PARTICIPANTS SHARED 16 “GOOD PRACTICES”, WHICH SERVED AS INSPIRATION FOR THE ENTIRE GROUP. AFTER THE LIST, YOU FIND DETAILS OF 4 PRESENTATIONS.

1. Financial vehicles at interprovincial level: Norandina and Ibérica | Br. Alfonso Fernández and Br. Libardo Garzón
2. Development of strategies for real estate use: Compostela - Br. Eduardo Montenegro
3. Management and governance in a multi-country situation: América Central - Br. Manuel Matilla
4. Management of schools based on strategic indicator: Marist Network of Brazil - June Cruz (On-line)
5. Joint negotiations: Nigeria | Br. Lucky Paul
6. Offering new educational services: Mediterránea - Br. Juan Miguel Anaya and Javier Sanz
7. Design and development of the strategic-financial plan: Editorial Edelvives - Javier Cendoya (On-line)
8. Reputational crisis management and institutional communication: L'Hermitage - Br. Andreu Sánchez
9. The change of strategy and economic positioning of the Brazil Centro-Norte Administrative Unit: Brasil Centro Norte - Br. José Augusto Junior
10. Governance and management model of an international province: Star of the Sea - Bernard Kenna and Paul Burges
11. Strategies for leadership development. People development: Brasil Centro-Sul - Br. Vanderlei Siqueira (On-line)
12. Sustainable development of the University of Mérida, a path taken in the long term: México Occidental - Br. Melesio Tiscareño
13. Separation of civil and canonical entities at the various levels of the De La Salle Institute: De La Salle Christian Brothers Institute - Br. Martín Rocha Pedrajo, Bursar Brother of La Salle (On-line)
14. Real estate management: Brasil Sul-Amazônia - Br. Lauri Heck and Ana Cláudia Roliano
15. Master plan for disinvestment to strengthen the mission: Brasil Centro-Sul - Br. Delcio Balestrin
16. New juridical architecture to address the future reality of the province: Santa María de los Andes - Raquel Cecilia Monje Vergara



ASSET MANAGEMENT - PROVINCE OF BRASIL SUL-AMAZÔNIA

BR. LAURI HECK AND ANA CLÁUDIA ROLIANO

When it comes to the management of provincial assets, we believe that it is essential to create a culture among the brothers and also among the lay people who help us to administer them, to legalize each of the assets we acquire with the authorities or, when we sell them, write them off. We should not leave outstanding debts because this could cause us difficulties in the future when we think of selling any of our assets or using them. It is always best to legalize assets immediately so that the next administration will be able to carry out good financial management.

We have many properties in our provinces that we use for our main activity; education, such as schools, social units, houses for the brothers, support housing, and others, but we also have a large number of properties that were used in the past and are currently not being used and could be available to generate income, to make the mission viable and sustainable. It is an alternative source of income to help support the Province. In this sense, we have to look very carefully and take advantage of the best opportunities offered by the market so that these assets can generate income and not be a burden, an extra expense in maintenance and upkeep. Alternative income generation can be an important

source of sustainability for the mission, or to generate funds. Partnering with companies, especially in the real estate sector, can help us to make these properties more profitable.

When we have properties to generate income, it is important to make a proper follow-up, with occupancy indicators, and income of each property and to make an annual evaluation of what we sell and what we acquire.

In terms of best practice in asset management, it is important to carry out a market valuation of properties at least every five years, so that we have a real idea of what they are worth in economic terms. In addition, external audits and monitoring through modern asset management systems are necessary, not to mention the constant updating of public agencies on changes in real estate structures. Estate planning is a set of best practices aimed at caring for the institution's assets to ensure their protection, growth, longevity, and sustainability.

Good wealth management allows us to identify and manage assets correctly today, tomorrow, and in the future.

When we talk about the management of the institution's assets, we must always keep in mind how to optimize the available resources in the best possible way for the sustainability of the mission.



SUPPLY OF EDUCATIONAL SERVICES - PROVINCE OF MEDITERRÁNEA

JAVIER SANZ AND BR. JUAN MIGUEL ANAYA

First of all, focusing on education, our Marist Province of Mediterránea has a collegial presence in three countries: Spain, Italy, and Lebanon. This means that educational legislation differs from one country to another. In Spain, there is a regulation on the charging of fees for formal education, as our private schools are not “regular”, but charter schools, receiving a subsidy from the region. However, this does not cover our total expenses, which makes

the income from this type of activity, for which we do have the power and freedom to establish the fee to be charged. Beyond the Spanish reality, these revenues represent a very important source of economic resources in the three areas of the Province.

We can divide this additional source of resources into three blocks: extracurricular activities “in general”, extracurricular sports activities (sports clubs), and other sources of financing.

Extracurricular activities are those that take place outside the student’s school period. These activities fulfill the demands of families, where both parents work full-time. Examples of these activities include robotics, judo, dance, languages, chess, gymnastics, and other activities...

In our case, we have developed these activities in three different formats: self-management (expenses and income are managed and organized directly by the school), mixed



management (income managed by the school and expenses on behalf of a third party that organizes the activity), and external management (income and expenses managed by a third party, with the school obtaining an income through a lease contract formalized with the organizing company). The Province promotes and encourages the implementation of the third model in all schools. We see how the advantages (management of personnel, payment collection and returns, lack of success of the business...) outweigh the disadvantages (mainly the lower revenue to be obtained from the profit that the organizing company takes). In the case of external management, the rental contract (which is always annual and can be reviewed every year) is formalized by the Institution, not by the school, since the school is the owner of the property. This also allows for greater control at the provincial level of these activities carried out at the school. We try to look for prestigious

companies that add value to our education and make it more attractive to attend our schools.

Regarding extracurricular sports activities a handover process has been followed for the sports clubs. Previously, these activities were loss-making, and the income was not adapted to the reality of their expenses, so it was necessary to have a third-party (sports club) management to make it effective, efficient,



and profitable. The club has its tax identification code, its labor, tax, and legal advisors, and its staff, and complies with its tax obligations. Despite this, it is not a third party detached from the Institution (Marists Sports Club "X"). It is supervised at the local level by the Management Team and at the provincial level by a person in charge of its follow-up. The profit that reverts to the school from the club is derived from a lease agreement for the use of the facilities (would be a similar case to the external management).

The third point would be other sources of financing, such as the sale of books and didactic material, the sale of sportswear and uniforms (unique design for all schools, with the Province's logo, avoiding stocking problems, and formalizing a contract from the Province (with an external company who will carry out all the management), and rentals of other school spaces (canteen, chapel, assembly hall...). The aim is to obtain resources using the means at our disposal.

MANAGEMENT OF AN INTERNATIONAL PROVINCE

PAUL BURGES AND BERNARD KENNA

Paul Burges and Bernard Kenna presented the establishment, on 8 December 2022, of the new Province of Star of the Sea. The presentation focused on 5 main areas of Governance and Management.

1. The Marist International region of Oceania becoming one Province of the institute

This provided geographical context for bursars from other regions of the institute.

2. Our journey to the new Province

This journey was explained providing the timing of change commenced in 2010 from 3 Provinces and 1 District to 1 Province -The Star of the Sea in December 2022

3. Planning, Process and Structures

The various Planning committees were explained such as the Province Development Committee, Executive Committee, and the various working groups. The Finance and Business Services working Group was used as an example to explain in more detail the terms of reference, Committee membership and the reporting requirements of the group.

4. The first six months

This provided the early actions and approach taken as the new Province took its initial steps such as the established 15 new Commission that covered the various Ministries of the Province.

5. Future stages and Developments

The increased level of communication, information gathering, exploring differences, and finding similarities was discussed.

The understanding of Various computer systems, the range of finance & Administrative skill sets, the different pressures and priorities and the tension between decentralisation and centralisation were highlighted.

The data collection process for the establishment of the new 2024 Province Budget was explained and a hope for the future of an objective for financial sustainability of Ministries within the region over the next 5 years.



FINANCIAL VEHICLES

BR. ALFONSO FERNÁNDEZ AND BR. LIBARDO GARZÓN

At the meeting of Provincial Bursars, two experiences of creating and organizing financial vehicles were presented: the first vehicle, explained by Brother Alfonso Fernández, is an initiative of the provinces of Europe, in which the bases are established for the creation of a financial vehicle in Luxembourg. On the other hand, Brother Libardo Garzón presented the joint proposal of the Provinces of Central America and of Norandina, established in Puerto Rico with UBS Bank. In these financial vehicles, there are already common agreements, and a common investment policy has been established. There are currently other Provinces that have shown interest in joining this latest initiative.

In these experiences of joint management of financial vehicles, multiple advantages have been identified: The first is the need to have clearly defined governance and



management bodies, which facilitate their transparency; a policy that allows strategies to be employed in accordance with the needs and objectives of the investments, as well as mitigating risks. Finally, by generating a larger volume, it allows for better economies of scale in negotiations. These experiences, although they are just beginning, allow us to glimpse a joint path, in which we will continue to build a global Marist family.



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