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Father General's XIIth Letter to the Congregation

The present global recession of the economy

**With a message from Father Rufus Whitley, OMI
General Treasurer**

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The present global recession of the economy

Dear Brother Oblates,

The economic crisis which the world has begun to experience over the last number of months, affects us all. We are speaking of a global recession, the worst in 50 years. Many basic goods have become more expensive, people whom we know have lost their jobs, and our own financial resources as a congregation have been cut by more than one forth.

The crisis is a complex issue to understand and we have many questions concerning it: How could it happen? Will we get out of it within a year or two? What should we learn from it? For now, nobody can present a full interpretation of this sign of the times but all people are affected and we need to respond the best we can. Some of our Oblate leaders have already offered a few analyses and suggestions. We are grateful for the attached memo of our General Treasurer, for the messages some Provincials have directed to their Provinces and for the exploration of the background of the crisis by Oblates working in Justice, Peace and Integrity of the Creation ministry and other concerned Oblates.

The General Council encouraged me, during its February session, to address the issue of the crisis in a letter to the Congregation, to which a word from our General Treasurer would be attached. My letter starts with a comparison leading to a short analysis, moves on to a reflection on the Gospel values, offers then some practical suggestions for everyone and finally, makes some concrete proposals for our provinces, delegations and missions.

1. A comparison and a short analysis

Since the issue at hand is complex and would require knowledge of the future which is not available, let me start with a comparison. The use of an image might help us to grasp the situation a bit more easily. Let us say we suddenly discover a lack of fuel for our vehicle at the petrol stations. Whenever such a shortage of fuel happens, firstly anyone who owns a vehicle will be careful with the way he or she uses it. One must avoid at all cost that the tank gets completely emptied out on the road and therefore one will take care to drive less kilometers. Secondly one tries to foresee for how long the shortage will last and tries to make provisions accordingly; the tank must be refilled at least partially before the last drop is depleted. Thirdly, not everybody owns a car but if there is a fuel shortage all are affected at least indirectly, for instance through lack of transport or consequences in the form of rising prices caused by the increase in fuel prices. Fourth, those who do possess vehicles have a duty of solidarity; they need to keep their cars and trucks running for the benefit of all, and assure at least the most necessary things like care of the sick, water and food supply and getting people to work or school.

The economic crisis the world is going through has effects similar to a shortage of fuel, and perhaps the comparison can help us to formulate a basic analysis.

- a) In the first place, the financial crisis requires from us, who are administrators of certain

financial resources, to be good stewards and to exercise foresight so that we do not run out of fuel during a crucial trip.

- b) Then, it challenges us to somehow find out how long the shortage may last. Many believe that we should at least make provisions to survive for two years at the present lower level of income. But for us Oblates, not only the acute financial crisis needs to be taken into consideration; there is also the broader issue of the gradual shift of our Congregation to poorer countries. Finally, we should not overlook that at this time of history the very ecological stability of the planet is threatened, and the present generation bears the heavy obligation to face it. Conclusion: The “shortage of fuel” might be a problem that will accompany us for some time to come.
- c) We must also recognize that we are “vehicle owners”. We do not own cars or trucks just for ourselves; our means are the “patrimony of the poor” (R 22a) and this fact calls us to responsibility on behalf of those most vulnerable.

After this very elementary analysis, before moving to action, it is convenient to remember who we are and take recourse to the Gospel values that are behind our vocation as Missionaries. This is a favorable time to meditate on Christ’s message, and on the section of our Constitutions and Rules dealing with the evangelical counsel of poverty.

2. A recourse to our values

What is required of us religious and of all Christians at this moment, is more than just quick fixes or superficial thoughts. What is required is the exercise of the virtue of poverty. The crisis prompts us to ask two fundamental questions, the first about our confidence in God and the second regarding our attitude towards the poor.

- As to our confidence in God, do we believe that God still maintains his covenant with us? Is God still our one and our all, or have we been worrying too much about material goods, leaving Him, His Covenant and His providence out of our considerations? Have we forgotten to contemplate “how the lilies of the field grow” (Mt 6:28)?
- If we think of the poor, we may use an image of the Bible. Lazarus lies at the door of humanity but the rich have not been caring; instead they have been feasting every day. Are we part of the rich? Can we switch to the side of Jesus who in turn invites us, through this parable, to stand with Lazarus himself?

Should we not then have something to offer to the poor, from the many Oblates who have been exercising the virtue of poverty in exemplary ways? The crisis invites us to rely on the faithfulness of God and it ties us in many ways to those in need. In my January Missionary Meditation I highlighted solidarity as the value we need to especially cherish in a time of crisis. Only solidarity can rebuild that severely damaged mutual trust which is the basis of the economy. As Oblates, we are already living this solidarity; we can even say that as Oblates, we find ourselves in a precarious financial situation because of our option to be the specialists in the difficult missions, to go in preference to places where we are in the midst of the poor and so hardly get paid for our work. Now, in this crisis, we should be even happier to find ourselves close to the poor and in solidarity with them; they are like our family whom we try to help and who also will sustain us in our mission when it comes to the worst.

Let us also be more aware that, as Oblates, we are not isolated from each other in such a time, that the Congregation is still one. In solidarity, we must help each other as much as we can. If we act

like this among ourselves, our example will transmit a similar message of solidarity to the people whom we serve.

3. Proposals applying to every Oblate

If a renewed faith in God's Providence, solidarity among ourselves and closeness to the poor constitute our answer as Christians and religious to the present situation, what does this mean in practice? The following suggestions are mostly based on observations made by fellow Oblates, thoughts which were collected here and there:

- This is a time to remember who we are as Oblates: a missionary society based on gospel values and concern for God's own cause, a society based on the apostolic poverty lived by Jesus and His preferential love for the poor.
- This is a time to recognize that the present system of globalized economy has brought us trouble; the reason is, according to some, that it has "failed to take account of two very important realities: the billions of people who are forced to survive on less than \$2 a day and the impact it has on the ecological system".¹
- This is a time to be realistic. To get back the financial means we have lost in six months may take six years. This means more poverty in some parts of the world. It also means less resources for our Oblate mission and that we need to cut our budgets and to look for new sources of income.
- While in every part of the world, the Oblates will have to face their own responsibilities, there might be some provinces that will need outside help in the form of professional guidance or material goods².
- Last but not least, we should take some small steps personally and in our local communities, even if it seemingly does not make a big financial difference. Small steps such as: less personal spending, less travelling, more environment-friendly behavior, more income-generating work and more courage to ask help from our benefactors.

Let me go so far as to say that the steps we can take personally and in our local communities are key to our response. Our faith and our Oblate values are real, only if they lead us to question our perceived needs; with time they will then bring us to a more simple way of life. Is this possible at all or have we got so used to a comfortable way of life that we cannot step down to a lower level? It will be possible if we find the right motivation for it. Changing our life as response to poverty it is not just a question of spending a bit less. Our motivation should not be "having less" but "being more", being more through growing in our relationships – becoming more respectful with God, with people, with nature.

Does not the next Chapter challenge us to conversion? Like Jesus in the desert, we too are tempted - unlike him we may have sinned and find ourselves needing a baptism of conversion. We are tempted

¹ Fr. Seamus Finn, OMI, in a newspaper article on "Catholic Social Teaching and the Financial Crisis". He further suggests: "The church can provide much needed moral leadership in the following areas: (1) the role of government in society, (2) the common good, (3) the option for the poor, and (4) telling the ecological truth."

² When launching, in May 2003, the Missionary Resource Campaign, we wanted to build on "the Gospel values of solidarity and responsible stewardship in the use of God's gifts", as well as on "greater self sufficiency".

by a comfortable and easy-going way of life that is totally distant from the sufferings of the poor and the victims of violence, and through conversion, we need to opt, with strength, foresight and courage, for a more simple way of life, closer to the poor and to God; having less and being more. Then our practice will match our preaching, and we will become true prophetic signs to a world that needs so much to see the values of sharing, compassion and sacrifice prevailing in action.

This crisis could be a golden opportunity and a providential moment to move from having more to being more. We would still cherish such a change of heart, even if material conditions should become better again. Even then, we still will have to challenge economic systems which exploit the poor and destroy God's creation.

4. Proposals to our Provinces, Delegations and Missions

Whatever we can do personally and in our local communities is of high importance and will help to transform the way of living of all of us. However, we have also to look at our Provinces and other Oblate Units. It is at this level that our mission, our care for the poor, including our families, the care for those of us who are sick or elderly and the support for our formation are coordinated. Let me highlight three things which of course also apply to any other larger financial organizations within our Congregation.

- The first is accountability. If the resources are scarce, there is more need than ever to let our confreres and our benefactors know about our income and our spending. If the financial crisis is a crisis of trust, we must build up mutual confidence, starting among ourselves, and that happens through accountability. Our Oblate financial resource is one of a common purse and of apostolic poverty. As a result, everything, including our helping the poor or giving emergency assistance to family members, needs to be discussed in community. A good method to achieve accountability is the use of the budget process.³
- The second refers to our spending. Right now we must start to cut our budgets by 8% to 10% or even more. For the immediate future, we should delay any major building expenses, avoiding as much as possible the depletion of our reserves. We must identify what is costing us too much: vehicles? Travel? Certain programs? An analysis of our spending will help us plan effectively.
- The third has to do with our income. Our General Treasurer poses three concrete questions:
 - a) Are there actions that may be implemented to increase the income derived from the pastoral and missionary activities of Oblates?
 - b) Are there actions that may be implemented to increase Local Fund Raising and support for the Oblate Mission?
 - c) Are there actions each Unit may take to increase its level of support from non Oblate sources?⁴

These are three of the four "pillars" of the revenue sources of a province or other Oblate Unit which need to become stronger now that the fourth pillar, investments, has been weakened.

³ The Treasurer General suggests, in the attached message, to "develop systemic budget processes at the individual Oblate, community, and Unit level with appropriate oversight and evaluation".

⁴ Cf. attached message.

To put these suggestions to the provinces into a short formula, one could say: “Present your accounts and cut the budget; get paid for work and ask for help”.

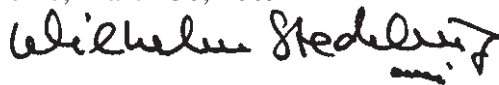
To conclude, let us recall once more where the source of our strength as missionaries lies. If our answer to the recession is connected to the deeper levels of our being, to living faith, unwavering hope and generous love, then we will have the courage to keep our eyes wide open, make the right options and carry through our decisions. Administrative skills, though important are not sufficient, this crisis calls us to put our trust in God. This is a time of renewal. The prophetic words of Jeremiah come to mind:

“Thus says the Lord: Cursed is the man who trusts in human beings, who seeks his strength in flesh, whose heart turns away from the Lord. He is like a barren bush in the desert that enjoys no change of season, but stands in a lava waste, a salt and empty earth.

Blessed is the man who trusts in the Lord, whose hope is the Lord. He is like a tree planted beside the water, which stretches out its roots to the stream: It fears not the heat when it comes, its leaves stay green; in the year of drought it shows no distress, but still bears fruit.” (Jer. 17:5-8).

May this financial crisis bring the best out of us, as the Missionaries of Mary Immaculate that we are. May the intercession of Saint Eugene and of Father Tempier, our first treasurer, assist us; may Mary who shared John the Apostle’s household give us peace of mind; may Saint Joseph help us trust in God’s Providence.

Rome, March 30, 2009

A handwritten signature in black ink, reading "Wilhelm Steckling". The signature is written in a cursive style with a prominent flourish at the end.

Fr. Wilhelm Steckling, OMI
Superior General

Appendix: Message from the General Treasurer

To: Wilhelm Steckling omi
Superior General

Fr: Rufus Whitley omi
Treasurer General

Date: 2-Mar-09

As per the request of the Superior General and Council, I offer the following observations regarding the financial crisis. I also offer some suggestions as to appropriate actions in the face of this crisis.

Introduction and Context

At the January / February session (2009) of the General Council, we were confronted with the pleas of several Units of the Congregation that are facing a financial crisis triggered by the current world economic turmoil. This turmoil has substantially affected their response for mission and formation.

This crisis affects not only the Oblates and other religious. Many Units, through their General Councilor, clearly enunciated the pain felt by the poor--suffering both the direct and indirect disastrous consequences of this financial turmoil, wrecking carnage. The toll of the crisis on families, through lost employment, services and opportunities overshadows every other consideration. It should serve as a reminder to us of the broader impact of this crisis, as we face our own internal difficulties, to concurrently acknowledge the broader effects of this crisis.

It is within this context that the budgets of the General Administration and the Trusts that support Congregational activities were reviewed and appropriate action taken. The entire context of mission and our charism challenges us as we face our own internal difficulties in responding to this crisis.

The Crisis is real:

Both the resources of the Congregation and the reserves of the General Administration have been significantly diminished by the crisis. This, as it does for all, presents both short term and long term challenges.

We must face and respond to the short term decline in financial resources in a way that does not destroy the ability of the Congregation and Administration to serve its mission, not only today but in the future. Apparently attractive and simple short term responses that will undercut long term viability must be avoided.

Response:

As we respond to the crisis we must be cognizant of Constitution 150 and the accompanying rules:

150. Since we are a missionary Congregation, the temporal goods of our Institute are, above all, at the service of the mission.

R 150a. While meeting the members' needs, through the income generated, we will look for ways to share what we have with others, especially with the poor.

R 150b. Since the placement of the Congregation's funds is not unrelated to issues of justice, particular care should be taken that our investments do not support enterprises which exploit the poor or damage the environment, but rather those which benefit them in some way.

This Constitution and the Rules identify three challenges:

1. To prudently manage our income and expenditures to ensure the financial viability of our Oblate life and mission, especially in support of formation and the elderly Oblates
2. To recognize the additional needs of those to whom we minister at this time of crisis
3. To respect our ethical responsibilities in our investment practices and procedures

To prudently manage our income and expenditure

All the data indicates that the current situation will probably not improve until the end of 2009 or even into 2010. Therefore, action is necessary now to prepare the General Administration and Congregation for the next two years. In light of this, the budget of the General Administration was reduced by 8%. The items that were significantly reduced or eliminated will require some Departments of the General Administration to either reduce or eliminate planned activities during calendar year 2009.

We also approved a supplemental grant for candidates in first formation so that the amount per candidate will remain at its current level.

As you know, the income of the General Administration derives from two sources:

1. Annual contribution of each Unit based on their category and numbers
2. Prudent distribution from the Tempier Trust

We reduced the budget of the General Administration to adhere to the prudent distribution from investments of 5% of the three year rolling average of the market value. We recognized that to waive this limitation, while helpful in the short term, would result in more severe budget difficulties in later years. We wanted to ensure that future members of the General Council would have the resources necessary to carry out the mission to which they are entrusted.

3. Respect our ethical responsibilities

The Congregation receives an annual report through the Major Superiors and Treasurers of investment activities, of both financial and ethical performance. The Superior General and Council re-affirmed the commitment to the ethical principles of investment directed by the General Administration:

- the exclusion of investments in companies or through institutions that violate the ethical principles of the Congregation.
- the utilization of our investments to challenge corporations and institutions, to change practices and policies which violate these principles.

Practical Suggestions- Short Term:

As you address a letter to our major superiors, mission superiors and/or treasurers, it is my hope that our process may assist the Units of the Congregation and each Oblate in responding to the crisis. The following principles may be helpful:

1. Investments: Adhere to the 5% distribution rate in terms of your income expectations from your investments (5% of a three year rolling average)
2. Budget:
 - a. Develop a budget that matches expenses to the income expected, recognizing that the budget for assistance to those suffering may need to be increased
 - b. Consider reducing total expenses by 8% - 10% or more, if required
 - c. Are there non-essential expenditures that may be avoided - use of vehicles, travel etc.
 - d. Implement or utilize a process to review your 2008 finances to identify areas of potential expense reduction or income enhancement
 - e. Delay programs or activities to future years
 - f. Delay the purchase of major items
 - g. Delay non essential capital projects and/or construction
3. Planning for income enhancement: review the four sources of revenue (Investment, Income earned by the Oblates, Local Fund Raising, Foreign Fund Raising)
 - a. Are there actions that may be implemented to increase the income earned by the Oblates?
 - b. Are there actions that may be implemented to increase Local Fund Raising and support for the Oblate Mission?
 - c. Are there actions the Unit may take to increase its level of support from Non-Oblate foreign sources? (Has your unit looked at its activities in terms of those that, with proper planning, would interest foreign donors; have you utilized the services of the Grant Director?)

The Missionary Resource Campaign and the Capital Sharing Program:

This situation reinforces the insight (a long range vision) of the Missionary Resource Campaign and the Capital Sharing Programs. Let us recall that this insight identified two levels of activity:

1. Macro Level
2. Micro or Unit/ Community Level

Macro Level

The Missionary Resource Campaign and the two Capital Sharing Programs, on a macro level, have almost fully achieved their goals. This, of course, is thanks to the Solidarity and Generosity of the Oblate Units.

Micro Level

The long term challenge highlighted by the financial crisis is the local level--both at the Unit and Community level. The Missionary Resource campaign challenged each Unit to evaluate its finances

in terms of self sufficiency, solidarity, integrity and the value of work. It was hoped this evaluation would lead to a more efficient and effective use of the resources available or potentially available. This may be the opportune moment in view of the financial crisis, the incoming requests for help and the cries we hear daily, to re-invigorate efforts on the local and Unit level to animate our efforts in service of the mission. Part of it has been mentioned earlier.

1. Implement and evaluate programs and activities to increase Local Fund Raising
2. Review and evaluate efforts to increase the income earned by the Oblates to support the life and mission of the Unit and the Congregation
3. Develop systemic budget processes at the individual Oblate, community, and Unit level with appropriate oversight and evaluation

It is only through the matching of the financial resources received from outside the Unit, either through the Congregation and/or other sources, with sufficient internal resources generated by the Unit, that the Oblate life and mission will be viable and flourishing over the next twenty years.

An additional consideration

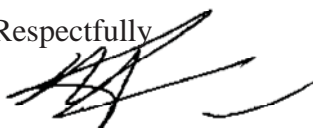
The financial crisis most acutely affects those with the fewest resources -- the poor. This also applies to Oblate Units. The financially dependent Oblate Units are feeling the effects more personally and dramatically than the more financially secure Oblate Units. However all Units are affected.

The financially secure will be unable to provide the same level of support to the Congregation and its Units that they have in the past--as they struggle with the challenge to maintain their own formation programs and commitments to elder Oblates for appropriate retirement and health care.

Conclusion

The challenge is clear. It is both a time of trial and a unique opportunity to use this moment of crisis to grow closer to the people and to enhance our Oblate solidarity and mission. Rest assured that if the General Administration is asked to assist your Unit in facing the special moment of life, we will do our best to provide appropriate support.

Respectfully



Rufus Whitley, omi

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of the General Adminstration of the Missionary Oblates of Mary Immaculate
C.P. 9061, 00100 ROMA-AURELIO, Italie
Téléphone (39) 06 39 87 71 Fax: (39) 06 39 37 53 22
E-mail : information@omigen.org