



Elements of a Community Pathway  
for Institutes of  
Consecrated Life in Canada

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## *By way of introduction*

The following is a “toolbox” that presents the steps for a transformative journey, a pathway for individuals and communities that includes:

- the transfer of works and responsibilities;
- a liberating approach for leadership, which is thus freed from administrative burdens to devote itself to its role of accompanying and supporting its members;
- resources to support the leaders and lessen the burden that this stage represents.

N.B.: the pathway must take into account the reality of whether the Institute is of diocesan or pontifical right, uniquely Canadian or international and, in the latter case, its vitality abroad.

The final section of the document identifies and presents CRC partners who can create and facilitate tailor-made processes to support each congregation. Ultimately, it is the congregations themselves who will find their solutions thanks to this professional support and accompaniment. These partners have resources and can refer congregations to other professionals.

## The stages of such a pathway

These stages are not necessarily experienced in a linear fashion, nor in the order in which they are presented.

1. Awareness of the reality
2. Entry into a forward-looking approach
3. The transformations to be considered
4. Partners for supporting congregations

## 1- Awareness of the reality

*A clear-sighted, lucid assessment of reality calls upon us to enter into a process of community transformation, and eventually to opt for structures of government and lifestyles capable of adjusting to an ever-changing reality. A journey to be experienced with the fullest possible participation of all members. We need to take a long, loving look at the current reality, such as it is.*

### The current situation : the vitality of an Institute

Being lucid requires seeking out objective data on the reality, appropriating those data and sharing them with the members of the congregation. To be viable, a congregation must meet certain criteria. (Can. 634; Perfectæ Caritatis 21; Ecclesiae sanctæ, 1966, II, 41)

1. Actuarial study (demographic and financial projections)
  - i. Median age (must be between 70 and 80)
  - ii. Recruitment (the last perpetual profession)

iii. Financial capacity to ensure the mission and care of its members until the death of the last member (Can. 114.3)

2. Ability to provide internal leadership — the two structures absolutely essential to the life of an Institute are the ability to hold a General Chapter and the ability to elect a Superior General and Council.

3. Internal autonomy to fulfill its mission (Can. 114.3): to have a sufficient number of qualified members, and the ability to respond to any requests for services from, for example, bishops.

## The decisions to be made

It's worth remembering from time to time that a lack of long-term viability does not mean an absence of membership vitality.

In the light of the current situation, decisions need to be made concerning:

- Recruiting new members
- Spiritual heritage
  - How can the members continue to embody the charism?

- God's call in these difficult times: passing from "roles" or doing to being — from roles to soul; continuing to be prophetic witnesses in this world. Consecrated life is first and foremost a LIFE.
- Apostolic works and ministries: to whom can we entrust their continuity?
- Governance (all the means an Institute uses to ensure leadership)
- The structures of government that make governance operational
- Member care
- Material heritage (temporal goods)
  - a. Properties
  - b. Finances
  - c. Archives
  - d. Cemeteries

## COMPLETION

When an institute notices certain major weaknesses (rapid numerical decline, lack of vocations, difficulty in assuming leadership on its own, or even economic difficulties), it is appropriate to conclude that it is facing, in the more or less short term, its completion.

What does that mean?

First of all, the term. Completion is derived from the Middle English verb to compleet, which comes via the Old French complir, meaning to complete an act, which in turn came from the Latin complere (to fill, to fill up). This gives rise to the following dynamic: completion is the act of completing or finishing; the state of being complete (the term accomplish comes from the same roots).

The etymology of completion opens us up to its full dimension, which, it should be noted, does not at first sight indicate the end, death.

Completion corresponds to satisfaction (of a desire, a feeling); the action of bringing a work to completion.<sup>1</sup> In everyday language, we could



say: don't throw in the towel before it's time, and continue to be fully responsible.

So, what exactly does the expression “an institute on the road to completion” refer to?

It refers to an institute that has taken the step of:

- identifying its reality;
- recognizing the precariousness of its human and financial resources;
- recognizing that the next generation has been non-existent for several years;
- taking into account the short-term difficulty, or even the impossibility, of assuming leadership responsibilities on its own;
- resolutely embarking on the process of reclaiming its spiritual, charismatic and missionary heritage — in short, all that its charism has engendered over the years;
- clarifying its intentions regarding the transmission of this heritage (community testament);

- entering into a creative process, open to other collaborations, to ensure that the administrative and governance services will enable it to remain in a “state of mission” until its extinction, and thus foster the serenity and fulfillment of its members.

<sup>1</sup> Centre national de ressources textuelles et lexicales (<https://www.cnrtl.fr>) (French only)

## 2. Entry into a forward-looking approach

*Rooted in the charism’s legacy from its beginnings to the present day, a forward-looking approach calls for **a creative dynamic of new life**. The risk of the status quo: since decline is inevitable, the day will come when others will make the decisions that were not made when the congregation was still capable of doing so, and these decisions will not necessarily correspond to what the congregation would have wanted.*

## **The journey's path will include :**

- A. A balance between personal and community development
- B. The spiritual and psychological dimension
- C. An ability to dream, to imagine, to discern and to decide to bring about our vision of the future that we are dreaming about for our congregation, for the charism, for consecrated life
- D. Confidence, daring and risk-taking

## **The spiritual and charismatic heritage to pursue**

The spiritual and charismatic heritage that has been embodied in its members and expressed in the mission is still alive. It is imperative to identify together in community (insofar as possible) the orientations to be given, the decisions to be made and the things to be done to ensure its continuity.

- The members live their Institute's own spirituality until the very end.
- The charism, a gift of the Spirit to his Church, is still alive and must be reinterpreted for its relevance in today's context.
- Continuity of the mission (embodied in apostolic works).
  - a. Transfer of responsibilities (management, administration, day-to-day operations).
  - b. Passing on of the spirituality and values to laity, who will carry on the mission.

## Defining orientations

In order to define orientations, it is first of all important to establish clearly what belongs to the congregation's canonical entity and its civil entity, and to establish a clear distinction between the governance of our institutes and their temporal administration. We will then be able to define orientations or guidelines for:

- The destination of temporal goods for the continuation of the mission.
- Options for governance, government, administration and facilitation, in order to foster the serenity of an ever-flourishing life for the members.
- Options to support the life of members (accommodation, health care, pastoral care).

The board of directors of the civil entity must adopt a policy by-law on orientation in which the congregation will set out its intentions regarding:

- Choosing a type of accommodation for members;
- The choice of a host community, if applicable;
- The contract for accommodation, care of the sick and end-of-life care
- Concession contract (cemetery);
- Allocation and distribution of assets, especially those that will remain when the civil entity is dissolved.

WHEN WE LOOK AT THE SITUATION CLEARLY, THE NUMBER OF DECISIONS TO BE MADE AND THE PATHS TO BE FOLLOWED, WE HAVE TO ADMIT THAT WE NEED HELP, THAT WE CAN NO LONGER “SUCCEED” ON OUR OWN.

## LAST WILL & TESTAMENT

Congregational directives related to the congregation's patrimony

One of the purposes of the process of completion of a religious institute is called "last will and testament". What exactly is it?

The completion process is based on a realistic assessment of the situation of an institute that is experiencing a variety of major weaknesses.

The institute has already embarked on a journey to name its reality, to assume it, and to set out in search of renewed governance and transformation. Services already exist, and each institute must remain creative so that, during its reflection, solutions surface.

The community's last will and testament is the result of this comprehensive undertaking.

Throughout the process, the legacy of each institute's charism becomes clearer.

Considering the institute's vulnerable situation, the transmission of this charismatic heritage becomes essential. It is truly a time of great intensity, a moment turned towards life, a *kairos*. With open hands and open hearts, the institute seeks to identify when, how and to whom it wishes to bequeath what the institute's charism has generated. We're talking about its spiritual, missionary, communal and financial heritage.

The adoption of a last will and testament concludes an institute's commitment to its process of completion. While its various elements become clearer during the process of reflection, its adoption, a real milestone for an institute, expresses its desire to keep alive the charism it has received as a gift by offering others the opportunity to make it grow, as illustrated in the parable of the talents. This process enables an institute to fully accept this

time of vulnerability, still living it as an act of mission.

When an institute can no longer provide for its own governance until its demise, the help of others is required. A commissary, assisted by councillors, is then appointed by Rome in the case of a pontifical institute, or by the local bishop in the case of a diocesan institute. The importance of the last will and testament rests in clearly indicating the institute's intentions to the commissary, whose task it is to respect the institute's wishes. Care should also be taken to ensure that the administrators of the civil entity adopt corresponding by-laws so that they too are able to respect the institute's intentions.

Writing a last will and testament means not only expressing one's last wishes, but also placing oneself at the heart of the ongoing movement of a gift received to be offered anew so that the work of the Spirit may continue.



### 3- The transformations to be considered

*It is crucial at this stage to remain in a creative dynamic in which each Congregation listens to God to imagine and create its own future and, in so doing, the future of consecrated life — the solution won't fall out of the sky and it won't come from Rome!*

#### RETHINKING GOVERNANCE IN TERMS OF TRANSFORMATION

When some people have problems, they go into “solution-seeking” mode. How can the situation be remedied as quickly as possible?

Others, faced with a problematic situation, seek to identify the cause or causes, clarify the path that led to the emergence of a particular difficulty, and question whether it is temporary or recurrent. The dynamic is then transformed: it is less a matter of finding an immediate solution (although this may be temporarily necessary) than of entering into a much deeper process of transformation with a view to adapting to the real situation.

When it comes to the governance of our religious institutes, we have to recognize that the same two alternatives apply. Experiencing the lack of personnel to take on the various tasks of leadership, we spontaneously go into “solution” mode. What can we come up with in the short term to solve, if only temporarily, our problem?

What the current situation of Canadian religious institutes calls for is a thorough rethinking of governance, from the perspective of adapting it to our reality.

Think of a series of circles getting smaller and smaller towards a central point. At the moment, the leaders are focusing their attention on the situations they have to deal with: a destabilized world; a collectivity that no longer corresponds to the values advocated by our religion; the virtual world that is turning people’s relational universe upside down; a complex — even explosive — social reality in some places; the Church and its values and practices that are increasingly contested, if not ignored; national difficulties in various respects, a rapid decline in

religious membership; the effects of abuses committed by religious; for certain institutes, economic difficulties and so on. As a result of all these factors, the scope of our gaze is narrowing, and immediate problems are capturing all our attention and becoming the sole focus.

In that context, an institute facing serious problems and wishing to engage in reflection and a transformation of its governance is doing exactly the opposite of what is described above: an extension of circles from the one closest to reality to the one furthest away. As a result, it's less a question of looking for the immediate solution, but it is rather a question of situating oneself in a universe that goes far beyond the limits of a given institute's existence, to enable it to identify, both now and in the future, what is major, what brings real adaptation, and what is secondary. By way of example: it is no longer the survival of this or that institute that is paramount, rather it is the dispositions enabling us to ally ourselves with the Spirit acting in our world in order to grasp the future

of consecrated life in Canada... in profound transformation. Another example: it is less a question of investing to save our works than of embracing a mission that corresponds to this time in our world, on our planet.

Ultimately, an institute that commits itself in the short term to finding solutions to its leadership problem is one that wants to adapt its model of government. Rethinking its governance in terms of transformation means agreeing to commit oneself to a demanding process that will enable them to identify the present situation, foresee its evolution, pinpoint its causes and, in a perspective of attention and openness to the reality of our rapidly changing world, define the model or models that will foster a governance adapted to the lives of women and men religious. This calls for a change of mentality that is part of the universe of fidelity to what we are called to live and become.

## GOVERNANCE

### Options offered by canon law

The Code of Canon Law offers various options to Institutes facing a leadership renewal problem and moving towards its completion; these options are listed below; their consequences or implications must be well understood.

**N.B. :** These options only seem viable in the short term for many Institutes in Canada; in the medium and long term, we need to move towards alternative (collaborative) arrangements.

- A. Suppression cf. Can. 120, 123, 584, 634
- B. Agreggation (clustering) cf. Can. 580
- C. Federation cf. Can. 582
- D. Union cf. Can. 121, 582
- E. Merger cf. Can. 121, 122, 582
- F. Commissary (or apostolic administrator)

For many congregations in Canada, completion will eventually mean the dissolution and disappearance of the congregation in the country. A number of modalities can be envisaged for the transition period.

- i. Reconfiguration (Can. 114-117)
- ii. Modification of the constitutions or juridical character of the Institute (Can. 587, §2)
- iii. Dispense with holding a general chapter — hold rather an assembly
- iv. Management of the institute (Commissary + council) appointed by the bishop for an Institute of diocesan right, or by the Holy See for an Institute of pontifical right

Whichever option you choose, you'll also need to consider any members "separated" from the Institute without having requested or received a dispensation or the Indult of Separation. These are often delicate situations that need to be handled with great care. It would be wise to consider consulting the canonical support services to deal as appropriately as possible with these sensitive situations.

### The Generalate

The Generalate usually includes the General Council's place of residence and its administrative centre.

Two options to consider for an international Institute whose generalate is in Canada:

- A. Keeping the Generalate in Canada — you'll then need to analyze the difficulties inherent in obtaining visas if you need to bring in leaders from abroad, the challenges associated with their integration and interculturality, and the impact their departure has in their country of origin.
- B. Moving the Generalate elsewhere while the Institute can still find leaders within its own ranks — in this case, you'll need to consider issues involved in transferring financial support from Canada to other countries.

An Institute could consider separating the administration (administrative offices) and the place(s) of residence of the members of the General Council, a formula already tried out by some Institutes. For example, you might opt for:

- “Relocating” the General Council: the Superior General and the Council no longer live together (each can live in their country of origin).
  - The reference address becomes that of the administrative centre.
  - Adapted operating procedures are put in place (for example, holding some meetings by videoconference and others in person).
- The administrative centre remains in Canada or is also relocated, but not necessarily where the members of the General Council live.

Modalities that are creative, alternative *ad experimentum*

Beyond the solutions often required in the short or medium term, an institute may choose to rethink its governance and organization with transformational change in mind. In this case, the focus will be on finding the models that best correspond to what members are experiencing.



Modalities will be chosen in which collaborative stewardship and governance provide complementary roles in assuming congregational leadership. Here are a few examples:

- Management entrusted to an organization (PJP—public juridic person) recognized by the Holy See;
- “Covenant” relationships between congregations; changes to constitutions and relevant approvals may be required. Different forms exist in the USA, Canada and the Netherlands;
- Accommodation or lodging contracts (may be part of a covenant, aggregation or federation) with shared services and assumption of healthcare costs:
  - a. One congregation with another congregation (civil agreement, not canonical);
  - b. Inter-community housing bringing several congregations together — canonical autonomy preserved.

In the longer term we might feel called to create new ways of relating (between congregations,

with dioceses and with the laity) and new models of collaboration to perpetuate consecrated life. With this in mind, we could draw inspiration from the document produced by the Dicastery: *New Wine in New Wineskins* (2017).

The Dicastery's meetings with the religious conferences from various countries in 2022 and 2023 suggest that it is open to researching and experimenting with new forms of governance under the following conditions:

- A. That this research and experimentation be carried out in consultation with the local bishop, the Canadian Religious Conference and the Dicastery.
- B. That the entire process be transparent, with frequent communication with the Dicastery.
- C. That the spirit of canon law be respected.

## ADMINISTRATION AND MANAGEMENT

### Impact on civils entities

Changes to the canonical structure will have to be reflected in an adaptation to civil law, as the civil entities of the Institutes are subject to federal and provincial laws. The Institutes will take care to include in the official documents of the civil entity all the provisions expressing the orientations (concerning lodging, care of the sisters, burial, cemeteries, archives, devolution of residual goods, etc.) that they wish to see respected by the leaders of the civil entity when no member of the Institute will have the capacity to sit on the board of directors.

### Temporal assets

Sound management of ecclesiastical assets requires us to consider the procedures for alienation of temporal assets, including current assets and those that may be inherited in the future. Resources can be found in the documents produced by DICLSAL: Guidelines for the Administration of the Assets in Institutes of Consecrated Life and Societies of Apostolic Life (2014) and Economy at the Service of the Charism

and Mission (2018). Canonical references: Can 1254; 1257 - §1; Can. 634; Can. 635; Can 670

### **Elements to think about:**

- Succession (or destination) of assets (cf. Can. 120 and 123) — distribution plan for financial resources
- Debts and contingent liabilities:
  - Pensions payable to retired employees
  - Current civil lawsuits
- Contingency and works funds
- Fixed assets vs. asset disposal (alienation)
- Solidarity between congregations to support those less well-off

### **Others aspects to consider :**

- A woman or man religious from another community (possibly a lay person) as **treasurer**
- **Cemeteries** (Can. 1241 & civil laws), concessions and perpetual care
- **Archives**
- **Employees**

## 4- Partners for supporting Congregations

### At the beginning of the process

These pathways include capturing the objective data of reality, the decisions to be made, the ways of continuing to embody the charism and how to pass it on.

### **Réseau Compassion Québec**

Website to be announced

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### **Canadian Religious Stewardship (SRRC/CRS)**

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T: 613-858-3092

### **CRC theological commission**

[secretariat@crc-canada.org](mailto:secretariat@crc-canada.org)

### Canonical questions

### **Center for Canonical Services, Saint Paul University's**

[https://ustpaul.ca/fr/faculte-de-droit-canonique-centre-de-services-canoniques-csc\\_2016\\_872.htm](https://ustpaul.ca/fr/faculte-de-droit-canonique-centre-de-services-canoniques-csc_2016_872.htm)

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Governance issues

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Management and administration issues

**Association des trésoriers et trésorières  
des instituts religieux (ATTIR)**

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**Association of Treasurers of Religious  
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Transfer of works

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## **Réseau Compassion Network (Manitoba)**

<https://reseaucompassionnetwork.ca/>

T: 204-410-4960

## **Catholic Health Alliance of Canada (CHAC & its PJP member)**

<https://www.chac.ca/fr/>

T: 613-567-1200

## **Catholic Congregational Legacy Charity (CCLC, en Ontario)**

<https://chco.ca>

T: 416-740-0444

