

**BROTHERS OF THE CHRISTIAN SCHOOLS**

**Circular 460**

**September 2009**

**Towards  
self-sufficiency**



**General Council  
Rome, Italy**

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**General Council**

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## Preamble

The 44<sup>th</sup> General Chapter challenges the Brothers and all Lasallians to search for self-sufficiency at all levels of the Institute. This is not only the reflection of our last General Chapter but goes back to our very beginnings as we can see in the life and decisions taken by our founder, Saint John Baptist De La Salle, in order to ensure the efficacy of the “Schools of the Poor” and the welfare of the community of Brothers. Self-sufficiency was not a current word in our Founder’s time. While always relying on God’s Providence, in the letters De La Salle wrote to different Brothers and benefactors, we can see his concern for the sustainability of the community and the mission.

The Rule reminds us that “*the life of an Institute is a continual challenge to be creative while remaining faithful to its origins.*”<sup>1</sup> In the General Council we are aware that the search for self-sufficiency requires the active participation from each one of the Brothers and not only of those who serve in Districts or Communities as bursars.

It is in this context of mutual collaboration and common concern for our future, that the Secretariat of Solidarity and Development has taken the challenge of moving forward the quest for sustainability in the whole Institute as directed by the 44<sup>th</sup> General Chapter. Along with the members of this Secretariat, we offer now this circular not only for personal reading, and community sharing but also as a reference for practical guidelines that will undoubtedly help to reach the goal

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<sup>1</sup> Rule 149.

we have set for ourselves to achieve self-sufficiency by 2014.

The challenges each District has in order to reach this goal are different. Aware that “*The need for this Institute is very great*”<sup>2</sup> we believe that in each District and at all levels the establishment of a sound policy for self-sufficiency, understood and accepted by every Brother will make the difference to ensure our educational mission for the service of the poor.

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<sup>2</sup> RC, Chapter 1.

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# 1. Introduction<sup>3</sup>

## ***a) Mixed messages***

A few years ago, a missionary Brother who taught English to non-native speakers told a story about one of his students. This student, the typical smart kid that challenges his teacher's absolute knowledge, told the Brother quite straightforwardly after class that he could not continue in the course because he was always changing his discipline policies without any logical explanation.

Puzzled by the student's remark, the Brother asked him to explain himself more clearly and to give an example.

"Well," the student said, "yesterday during your lesson, I was checking my dictionary to find out the meaning of something you had just said; you scolded me in front of everybody for not being attentive while you were speaking. You told me, 'Do not look it up in the dictionary; ask me!'"

"So? What is the problem?" the Brother said.

"Today," the student said, "again I wanted to know the meaning of a word I did not understand; I raised my hand and asked you. And... what did you tell me? 'Do not ask me. Look it up in your dictionary!'"

## ***b) Solidarity and self-sufficiency***

This story might recall times in our own lives when it seemed that we were asked to operate under two apparently different and contradictory policies.

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<sup>3</sup> Any reference to "Districts" in this paper is to be applied equally to "Sectors", "Delegations" and other collective entities within the Institute.

Since the late 1980s, and especially after the 43<sup>rd</sup> General Chapter, it has become increasingly clear that the main objective of the missionary policy of the Institute is the grounding of the local Institute as a financially self-sufficient entity with qualified staff.

*“The mission received from the 43<sup>rd</sup> General Chapter is to promote the main objective of the missionary policy of the Institute: Implantation of the local Institute (self-sufficiency in qualified staff and in finances) and of the Lasallian Educational Mission of Association for the educational service of the poor.”* (Superior General’s Report to the 44<sup>th</sup> General Chapter)

The last Chapter is even more explicit and has proposed clear directions to address self-sufficiency.

*“The following matters need to be taken into consideration and require searching for solutions:*

- 2.1 Economic self-sufficiency at the Institute, Regional and District levels.*
- 2.2 Economic management in solidarity that avoids maintaining the dependence of certain sectors with regard to others.*
- 2.3 Research for and obtaining sources of finance external to the Institute for works and structures at the service of the Mission.”* (44<sup>th</sup> General Chapter 8 II, 2, 2.1-2.3)

In the 1960s, the Declaration spoke of “solidarity” long before that word became popular. In doing so, it emphasized the underlying sense of belonging not only to a local community or a specific District but also, as belonging to an international community. From then on, virtually all Lasallian documents stress the importance of living in solidarity.

*“The community of the Brothers extends beyond the limits of the house where they live. The community embraces the District and the whole Institute; the Brothers are aware of their solidarity with those among them who are suffering, who are undergoing persecution, or who are seeing their work destroyed by outside forces.” (Declaration 21)*

*“We recognize that in the Lasallian network our educational responses to the needs and necessary economic resources are unequal. We are challenged to find effective strategies of solidarity for equity and educational equality.” (44<sup>th</sup> General Chapter 4, 3.1)*

However, our recent history shows that while solidarity has been assumed by almost everyone, there are many individuals who have been slow in assuming the need for self-sufficiency. In a way, we find ourselves like the smart kid in the story we just read. The teacher – the Institute – invites us to strengthen the bonds of solidarity and at the same time it tells us to do so without others, to be self-sufficient.

Although we are “associated for the mission” in a single movement to respond to God’s call as Religious Brothers, it should be noted that community and mission belong to two different areas of action. To put this in financial terms, **community** and **mission** are two different enterprises; two different investments; two different bank accounts. Because we tend to forget this, we can easily fall into the trap of confusing the standards we use for school business with issues related to our internal, community matters, as Brothers.

## 2. History and tradition

Our very beginnings show us that De La Salle organized the communities of Brothers autonomous of Church welfare. There has always been something independent in our being Brothers. We have taken pride that as religious men, we have not become dependent on the clerical hierarchy for our own needs.

In many ways, the successful story of the establishment of Lasallian communities outside France and, especially in developing countries, has been a “short treatise” of good practice. For those who think ourselves as missionaries it is inspiring to recall those Brothers of the past who left their home countries and went overseas knowing that they would not be able to return; knowing that there would be no easy way to find help and security in case their mission became difficult. They found security and help in their new environment but only after they themselves worked for it.

In some areas and from their earliest days, the Brothers worked towards self-sufficiency with little external support. In other regions, the Brothers became dependent on external aid due to many social and religious factors. In reviewing the evolution of these trends, a key factor has been the issue of ownership of the schools. Many missionary Brothers, invited by Bishops, accepted the invitation to either build their schools on church land or work in church schools.

Generously helped by their “home” Districts both financially and in personnel, the Brothers saw little need for recruitment or for financially ensuring the future. Over the years, this process favored an unhealthy attitude of dependency on

external sources of support.

When new Districts were established and local candidates joined the Institute, the local Brothers continued working alongside the missionaries in church schools. In many cases, thanks to their efforts and at their own expense, the Brothers continued expanding the Bishops' schools.

As a result, after decades of generous and selfless service, some Districts own very little property and/or few institutions. The schools, some provincial houses, and centers of formation were built on church land. Even today, these properties still belong to the Bishops. In most cases, the Bishops have no desire to give these properties to the Brothers despite the fact that the Brothers built, maintained and supervised these structures. Furthermore, in some cases, the Brothers are obliged to follow the Bishops' policies regarding the day-to-day administration of the schools.

In countries where the Brothers owned most of the schools, they were able to control and diversify their institutions. Faithful to the tradition of the Institute, they established some income-generating schools which were twinned with poor schools while also contributing to the running costs of the Districts. Accordingly, they achieved a significant degree of self-sufficiency. They succeeded in balancing the policies of self-sufficiency and serving the poor.

In other areas, the Brothers established schools primarily for the upper and middle classes. In their effort to make these institutions also accessible to the poor, they kept their fees low but the wealthy and the middle class students remained the main beneficiaries. In such schools, the poor have remained a small minority. Furthermore, these

schools, due to their low fees, contribute very little to the running costs of the Districts.

### **3. Why self-sufficiency?**

#### ***a) It is a matter of human dignity, freedom and responsibility***

Human beings are born dependent and continue being so for many years. Notwithstanding, there is a time in a person's life when independence becomes a matter of dignity. Just as persons mature, accept the challenge to stand on their own feet, and walk away from their parental home to live on their own, the same applies to institutions. For a number of reasons, however, there are people (and institutions!) which are not courageous enough to do this.

This metaphor concerning personal growth and institutional growth is both complex and compelling. Omitting any judgement regarding such growth, it is a matter of historical record that a number of administrative units in the Institute continue to depend on outside resources.

One way to measure the level of freedom and dignity in all of our institutions and administrative units is to ask a simple question: Where does our money come from? The day we can answer this question with a healthy sense of pride (because we earned the money from our own efforts rather than relied on the kindness of others), we will be truly free. We will be more convincing to ourselves first, and the people for whom we work. This might well become the best lesson on empowerment we could ever teach.

In 1998, an Institute circular called “*Reflection on the Missionary Policy of the Institute*” was published which dealt with the issue of dependence as opposed to dignity for the first time and with striking clarity:

*“There is nothing glorious about living permanently on the proceeds of begging, or depending on others to provide the basic necessities of life. It is a question of respect and human dignity.”* (Circular 443, p. 25)

Pope Benedict XVI, during his recent pastoral visit to Luanda, Africa, in his speech on 20<sup>th</sup> March 2009 encouraged the audience to take charge of their destinies. He said, “*African men and women themselves, working together for the good of their communities, should be the primary agents of their own development...*”.

### ***b) It is also a matter of survival***

Recently, a Mission Coordinator of a well-known religious congregation explained the challenges his Institute was facing. In the 1970s and 1980s, the wealthier provinces (80%) of the congregation were able to support the poorer provinces (20%) both in money and personnel. Due to diminishing personnel and financial resources, the realities of the day have turned the statistics around. Today, the wealthy provinces represent 20% while the poor provinces represent 80% of the congregation. As a result, the wealthy provinces are severely strained to adequately help their poorer provinces as in the past. The congregation now faces a crisis for survival.

As far as our Institute is concerned, the following statistics reflect a challenging reality:

Region	Brothers			Average age
	Perpetual vows	Temporary vows	Total	
French sp. Canada	166	0	166	80
RELEM	2250	26	2276	71,6
USA/Toronto	743	7	750	69,9
Total	3159	33	3192	71,6

RELAF	244	124	368	44,3
RELAL	785	238	1023	55,5
PARC	399	84	483	57,4
Total	1428	446	1874	46,1
Grand total	4587	479	5066	62,2

According to our Rule, *“The establishment of a District presupposes a certain number of bonds among the communities that are called to compose it. To serve as a guarantee, there must also be a well-founded hope that the District will have at its disposal in the near future sufficient resources in personnel and material goods to be able to provide for the animation of the communities, for the formation of the Brothers, and for the development of the activities for which the District has charge.”* R 125a. And then adds, *“If a District can no longer meet the conditions mentioned in article 125a, discussions should be initiated between the District and the Region to which it belongs. Brother Superior and his Council then take whatever measures are necessary, ensuring always that everything is done with respect for the persons involved.”* (RC 125e)

The Superior General, in his official report to the 44<sup>th</sup> General Chapter, raised the issue of self-sufficiency:

*“Some administrative units of the Institute could be more involved in implementing the principal objective of the mission-*

*ary policy of the Institute, by avoiding too great a financial dependence on overseas help by implementing projects which are hardly well adapted to local resources in terms of qualified personnel and finances.” (Superior General’s Report to the 44<sup>th</sup> General Chapter)*

## **4. Principles**

### ***a) Community based efficiency***

It is said that some African tribes worship the serpent because its whole body touches the ground and it must, therefore, know all the earth’s secrets. It knows them with its belly, with its tail, with its head. It is always in close contact or mingled with Mother Earth.<sup>4</sup>

When we think about our Institute, this image seems very appropriate. As an organization in touch with the people we serve and the mission we pursue, it is not only our feet that must be in contact with the ground but our whole being. In our own management structures we need to re-discover that in order to be efficient, we need the talents of all the Brothers and young men in our formation houses, independently of the age, assigned jobs or formation stage.

As a community of Brothers in search of self-sufficiency, we should not be birds of the air who only rarely are in touch with the earth; we should be the snake that always touches the ground. Only by being aware of this, will we be able to know the reality of our limited resources, and the potential that these resources have in their own right.

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<sup>4</sup> Cfr. Kazantzakis “Zorba the Greek”.

This image of the snake reminds us, also, of Matthew's Gospel when Jesus invites his disciples to be "as shrewd as snakes and as innocent as doves." *Mt 10, 16*. This is one of the few occasions the snake has a positive role in the Bible. Here we find the image of cleverness and intelligence. It is interesting to note that the context of this piece of advice from Jesus happens when He calls them and empowers them to be His ministers.

### ***b) Prophetic Realism***

Besides the corporate mentality that a sustainable future is the responsibility of each single member of the group, the other basic guideline in our pursuit of self-sufficiency is "Prophetic Realism."

Without realism, life becomes anxious and stressful. Without realism, utopias and visions lose their transformative capacity and become spectacular but not dynamic. Ronald H. Stone<sup>5</sup> proposed the expression "Prophetic Realism." Practicing this principle, we need to find the right balance between two different forces that ask for different policies. Shall we have absolute trust in Providence or pursue fundraising and savings? Shall we follow our charism or institutional norms? Shall we focus on inspiration or production?

The principle of "getting real" asks from us, on the one hand,

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<sup>5</sup> RONALD H. STONE is the John Witherspoon Professor of Christian Ethics at Pittsburgh Theological Seminary. Bibliography: "The Ultimate Imperative: An Interpretation of Christian Ethics"; "Professor Reinhold Niebuhr: A Mentor to the Twentieth Century"; "Christian Realism and Peacemaking: Issues in U.S. Foreign Policy" and others.

not to look for projects that exceed our capacities. On the other hand, it asks us to exploit all our capacities and pursue all the possibilities we have.<sup>6</sup> To be consistent with our role as “realistic prophets” we need to start by looking to those seemingly impossible projects with our eyes set upon simple and modest steps. These steps eventually will lead us to the more complex and ambitious goals we desire. Only by knowing, accepting, and working within our own limits will we be able to go beyond them.

There are some small and modest challenges which, when well taken, might lead to a very bright future for the Brothers and their partners. Let’s explore these possibilities.

## **5. Challenges**

### ***a) Role of Central Administration of the Institute***

We are aware and supportive that in the spirit of working towards self-sufficiency, our Central governmental structures must also be in communion with the entire Institute in this challenge.

Programs and strategies must be actively pursued by our Central government and services in order that all the Brothers throughout the world will see it as a model of sustainability. As the Brothers strive to create a new future for the Institute in this time of transition, it becomes even more significant that we can depend on a self-sufficient Central administration to be a sustainable presence in the support of the Brothers and their mission throughout the world.

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<sup>6</sup> Cfr. “Profecía de la vida religiosa Hoy”, José Cristo García Paredes, 2008.

## ***b) Role of District Administration***

In order to move towards reaching realistic goals in our quest for self-sufficiency we need to start by setting up a committee that will assist the leadership team.

### ***b1) To establish a Development Committee at the District level***

It is a modest challenge to form a small Development Committee which can serve as an efficient team to support the Visitor and the District bursar. Self-sufficiency is not the bursar's responsibility alone. The Visitor needs to be involved along with a person, not necessarily a Brother, who is knowledgeable in financial matters. The first challenge is to form a dedicated, talented team.

This Development Committee should be used for planning, consultation, deliberation and discussion of economical issues. It should be a committed team which is always ready to assist the Visitor and the bursar.

Think about the financial decisions which have been made during the past few months. Was the decision reached after broad consultation? What kind of discussion preceded the decision? Does this decision have a concrete set of identifiable action steps which will guarantee its implementation? How will the success of this plan be measured and evaluated? Failure to anticipate reasonable and prudent answers to these or similar questions may underscore a lack of realism in self-sufficiency goals.

### ***b2) To ensure that Development Committees work with the Brothers***

The Development Committee must not work **for** the Brothers but **with** the Brothers and lay associates. A team that works in isolation is destined to suffer disaster because it is not in contact with the constituency it seeks to serve. A Development Committee that works *for* the Brothers but not *with* the Brothers will never be effective.

Only by working together with the Brothers, will the Development Committee be able to:

- Determine the real needs and a rational situational analysis.
- Produce a reasonable inventory of possible resources.
- Design a sensible project that responds to the already seen and considered needs and possibilities.
- Produce a sound action plan to realize the project.
- Determine a concrete and realistic timeline based on the circumstances of the Brothers and their communities.
- Elaborate a coherent budget that comes not from the expectations of someone not familiar with the local needs but rooted in the sensible application of the previous steps.
- Encourage a healthy monitoring which will not produce suspicion and distrust between supervisors and supervised.
- Facilitate a convincing evaluation that will lead to better and more efficacious outcomes.

If this Development Committee lacks connection with “the ground” – like the snake of our previous allegory – its members might wrongly think that “*the others*” do not care about finances. This apparent indifference breeds resentment in the team members, reinforces its isolation, and heightens its self-perception as a group not accepted by the others.

If the Development Committee is already in place, it would be good to consider the following questions: Does the Development Committee have a plan to connect with the Brothers? Who is the link between the Brothers and the Development Committee? Who communicates the suggestions of the Development Committee to the Brothers? How is it communicated? If these and similar questions cannot be answered, it might be time to consider again the lack of realism in the District's self-sufficiency goals.

### ***b3) To involve people in the same formation program***

Despite one's very best intentions, a development program that is focused on inspiring people to apply new approaches can fail if it has not been vetted throughout the organization and properly communicated. If members of the organization have not been involved together in the same formation program, they may resist efforts to change.

The challenge is to ensure everybody participates in the same formation/information program together. This effort should obviously include a proper and coherent formation program on these issues for young Brothers in their different stages of formation. Oftentimes young Brothers who join regular community life after their formation years have never been exposed to the realities of the economic strains that their Districts have been through in order to ensure them a quality education. Both principles of community based efficiency and prophetic realism need to be well understood and practiced by each Brother during his formation days.

When the Brothers and Lasallian Associates go through a program together, they emerge with a consensual view of the

opportunities and problems they all have in reaching self-sufficiency. Through collaborative dialogue, each community and educational work, along with each Brother and Lasallian Associate, will creatively explore the best way to tackle the problem. The result will be a faster and more effective change of attitude and a healthier sense of pride and dignity.

***b4) To remember continually that people are more important than structures***

In any program, there is always the danger of attaching more importance to structures than to people. While the establishment of an efficient Development Committee, working with Brothers and Associates is an important step in the right direction, it must not be forgotten that people are more important than structures. When dealing with finances, it is important to see the faces of the people behind the numbers.

When thinking about a District's future, it is normal to have a big-picture perspective. Leaders use this kind of big picture to imagine a better future, create ways to improve the present, and encourage new thinking within the group. Such planning will only be effective, however, if one's vision is balanced by remembering the people who in their day-to-day business will be implementing it. These faces will give key information about the priorities in the plan and the challenges District leadership will need to assume.

As leaders take charge of operations, they are in a position of influence. Through such leadership initiatives will be taken, directions issued, and the enterprise will move forward. While leaders may call individuals to be accountable for the expectations policies have on them, this dialogue between

leaders and their constituencies provides opportunities for sharing the dream and encouraging individuals to give their very best to the collective effort.

When an exciting prospect is clearly articulated and the benefits are well-communicated, people will want to participate in achieving the goals associated with it. Indeed, there is no stronger an engine driving an organization forward than a collaborative group of talented individuals dedicated to a commonly held vision.

## **6. Practical guidelines towards reaching self-sufficiency**

There are some practical ways in which effective leaders will help their areas advance. Listed below are a few of those ways:

### ***6.1 In order to better use the district properties effective leaders need to:***

- 6.1.1 Have a list of the properties.
- 6.1.2 Know the deeds of the properties.
- 6.1.3 Make an evaluation of the use of properties.
- 6.1.4 Make concrete recommendations for improving the better use of properties.
- 6.1.5 Follow up the implementation of these recommendations.

### ***6.2 In order to better use the district financial resources effective leaders need to:***

- 6.2.1 Have a list of investments in endowment funds, bank accounts.

6.2.2 Make an evaluation of the returns of these investments and bank accounts.

6.2.3 Make concrete recommendations for better returns.

**6.3 In order to better administer the financial resources of the communities effective leaders need to:**

6.3.1 Analyze and evaluate the budget and balance sheets of each community.

6.3.2 Make concrete recommendations for the improvement of the financial situation of each community in line with the reality of life and of the socio economic situation of the country.

**6.4 In order to better administer the financial resources of the educational institutions effective leaders need to:**

6.4.1 Analyze and evaluate the budget and balance sheets of each educational institution.

6.4.2 Make concrete recommendations for the improvement of each educational institution in line with the reality of life and of the socio economic situation of the country.

**6.5 In order to better administer contributions from diverse sources of income (contributions from educational institutions, communities, properties, investments) of the District effective leaders need to:**

6.5.1 Find ways to guarantee self-sufficiency in daily expenses and operational costs in communities and educational institutions.

6.5.2 Establish a system that ensures funds for pension, for

health care, for initial and on-ongoing formation, and for contingencies.

**6.6 Ensure a concerted approach that involves all the Brothers, especially Brother Visitor and his Council and the District Bursar, in the implementation process of the District Development Policy**

**6.7 Establish a Development Committee under the following directions:**

6.7.1 The Development Committee is presided over by the District Bursar.

6.7.2 The main objective of the Development Committee is to draw up the general District plan for self-sufficiency. This plan must be set in the context of the District master plan which in turn must take into account both the service of the poor and the requirements of self-sufficiency.

6.7.3 This plan for self-sufficiency will be submitted for approval to the Visitor and his Council.

This plan should:

- Identify, describe and analyze the reality of the District.
- Examine its technical and financial feasibility.
- Develop the necessary procedures to convert an opportunity into a concrete project, always keeping with the mission of the Institute.
- Remind Governments of their obligations to make education available to all children.
- Be a guide for the District activities.
- Be an instrument for fundraising.

6.7.4 The Development Committee facilitates, supports and surveys the implementation process of the District Development Policy:

- a. In order to guarantee that it reaches all levels of the District.
- b. In order to unite and coordinate forces involved in it as Brothers, professional experts, benefactors, contractors.
- c. In order to keep up a sense of responsibility and of accountability among all agents involved in it.
- d. In order to make sure that everything is done in line with official rules and regulations spelled out by the Law.
- e. In order to guarantee the flow of official information among the Brothers.

## **7. Recommendations**

In times of rapid change, the only organizations which survive are those capable of transforming themselves, eliminating whatever no longer works well, and adapting to new needs in the social environment.

Similar to many non-profit social organizations, Districts find it difficult to abandon what they have been doing, even if it is no longer adequate or effective. Districts should ask themselves: *“If we had to start from scratch today, knowing what we know, would we continue doing what we are doing?”*

This movement towards self-sufficiency cannot be just the intuition of a single person. To be successful, every member of the District must be engaged. If the plan is based on well

conducted feasibility studies, everyone's sustained effort will yield success.

Our last General Chapter invites us to take a step forward by telling us:

- *“That aid to the Districts and sectors lacking sufficient resources be applied as a priority towards projects that lead to economic self-sufficiency.*
- *That [the] Districts clearly separate goods and resources belonging to the mission and those which belong to the patrimony of the District, such as a Brothers' community.*
- *That the financing of every initiative and permanent or temporary structures in relation to the Lasallian educational mission be the object of reflection and prior decisions. This applies to every level of the Institute.*
- *That in all Districts and sectors where it is necessary, professional formation, management and professional accountability be assured.”* (44<sup>th</sup> General Chapter II 3, 3.2-5)

In line with these ideas, it seems both reasonable and prudent to recommend:

1. If a District really wants to abandon its dependence on external sources and launch a genuine process of self-sufficiency, it has to devise and implement, with courage and professionalism, a general plan based on the guidelines proposed in 6.7.3 above.
2. In each country where the District is established, and in accordance with the local legislation, the Brothers are encouraged to establish associations in such a way as to allow them to access to government grants and tax exemptions.
3. Districts should pursue a centralization of their finances in order to ensure an *“economic management in solidarity”*

that provides the same standard of life in each one of its communities.

4. This “*management in solidarity*” will help towards a greater self-sufficiency in the running costs of the District. External aid from abroad should be considered only as a *temporary* addition. This aid is temporary assistance towards the goal of long-term self sustainability.
5. Priority has to be given to development projects which favor the Brothers’ owned (educational) institutions and which contribute towards the self-sufficiency of the District.
6. The role of schools should be reviewed for those who can pay the cost of their education in order to make them contribute to the running costs of the District. If needed, these schools should change their legal status.
7. Districts which do not have any school for individuals who can pay the cost of their education are invited to consider opening one. Funds from such facilities can contribute towards self-sufficiency and the sustainability of other schools for the needy.
8. Those Districts which own agricultural land and urban properties are invited to study the possibility of turning them into income-generating enterprises.
9. All significant financial activities and transactions of Districts/Sector should be done through banks.
10. All financial activities of the Districts should be annually submitted to external, independent third-party auditing. The results should be presented to the District Council.
11. In view of their present fragility and scarce resources both in personnel and finances, some Districts may con-

sider the possibility of restructuring in order to form larger administrative units.

At the end of this document you have a “Self-sufficiency Check List” that may become a regular instrument you can use to assess the level of sustainability in your District. We encourage you to go through this list periodically, reflect on the answers you provide and take action in order to preserve and improve the District’s effectiveness in its service of the poor and the requirements of self-sufficiency.

## **8. Conclusion**

At times, taking stock of the present situation of a District may cause one to wonder about its future. One thing is certain: the future will be the result of the present we are building.

*“The vitality of the Institute depends on the quality and the fidelity of each of its members. Each Brother develops his talents and places them at the service of the Institute which the Founder saw as the work of God.” R 143.*

Victor Hugo, the French writer, used to say that the future has many names:

- For the weak, it is **unattainable**.
- For the timid, it is **unknowable**.
- For the brave, it is an **opportunity**.

Brother Álvaro Rodríguez Echeverría,  
Superior General  
and his General Council

*Rome, September 2009*

## A self-sufficiency check list

### **Introduction**

When the Superior General reported to the 44<sup>th</sup> General Chapter on the mission which had been received from the previous chapter, he emphasized that the main objective of the missionary policy of the Institute is to establish a local institute *which is self sufficient in qualified staff and in finances*, and to ensure the Lasallian Educational Mission by which we are associated together for the service of the poor.

Along similar lines, the Rule indicates that "... a District... should have sufficient resources and material goods to be able to provide for the animation of the communities, for the formation of Brothers, and for the development of the activities over which the District has charge." (R 125a). To finance its operational budget, the District should count only on the resources its members and institutions produce. It is not prudent to depend on outside resources to cover the required ordinary needs of either Brothers or institutions.

### **District administration**

A District's vitality depends on the guidance, support and leadership of a number of persons directly involved in its animation: the Brother Provincial, the Bursar, the person responsible for pastoral care, and all the people working in the District's office.

YES      NO      <sup>IN</sup> PLANNING

  

Do you know the minimum cost of your District's administration services?

- |                          |                          |                          |                                                                                             |
|--------------------------|--------------------------|--------------------------|---------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Do you have the financial resources to cover the cost?                                      |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Has a minimum budget for the operational costs of the District been determined?             |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Have you identified viable income sources to fund the annual District budget?               |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Is there a District plan for the next 5-10 years which has set a goal for self-sufficiency? |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Has this District Plan been approved by the District Chapter?                               |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Does the District have a Development Committee?                                             |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Does this committee function to actively oversee finances in the District?                  |

***Initial and ongoing formation***

YES      NO      IN  
                         PLANNING

- |                          |                          |                          |                                                                                   |
|--------------------------|--------------------------|--------------------------|-----------------------------------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Does the District have a plan for the initial formation of the Brothers?          |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Is there a computation of the cost of initial formation?                          |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Has the District plan for the initial formation of the Brothers been implemented? |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Does the District have a plan for the ongoing formation of the Brothers?          |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Is there a computation of the cost of ongoing formation?                          |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Has the District plan for the ongoing formation of the Brothers been implemented? |

## **Medical and Pension**

YES      NO      IN  
                         PLANNING

- |                          |                          |                          |                                                                                                                                                         |
|--------------------------|--------------------------|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Does the District have a medical (public or private) insurance plan for each Brother?                                                                   |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Is the District able to guarantee continuity of insurance for all of the Brothers in the District?                                                      |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | If there is no private or public system, has the District developed its own financial plan for the ongoing health care of the Brothers in the District? |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Is the District open and supportive of District plans for public and/or private pensions for the Brothers?                                              |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Has the District performed an actuarial study of the pension for the Brothers in the District?                                                          |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Does the District fulfill its responsibilities on a yearly basis to fund the needed pension of the Brothers?                                            |

## **Mission**

YES      NO      IN  
                         PLANNING

- |                          |                          |                          |                                                                                                                                      |
|--------------------------|--------------------------|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Has the District prioritized its missions, works and institutions?                                                                   |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Does the District have a clear plan how to finance these missions, works and institutions?                                           |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Does the District know the minimum support the District must provide to maintain viability for its missions, works and institutions? |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Has the District set aside a reserve for new initiatives?                                                                            |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Has the District set aside funds for emergencies?                                                                                    |

- Are there funds set aside for the maintenance of the District's properties?
- Is there interdependence (e.g. wealthier schools supporting poorer schools) among the missions within the District?
- Is the District able to pay the appropriate taxes to the Region?
- Is the District able to pay the appropriate taxes to the center of the Institute?
- Are there projects developed in solidarity with other Districts, the Church or other agencies?
- Are long-term costs estimated which commit the District to partnerships with other Districts, the Church or other agencies?