

**Congregation of
the Passion of Jesus Christ**

**FINANCIAL
STEWARDSHIP
MANUAL**



**OUR ECONOMIC RESOURCES
IN SERVICE OF
OUR CHARISM AND MISSION**

General Secretariate – Rome 2023

FINANCIAL STEWARDSHIP MANUAL

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FINANCIAL STEWARDSHIP MANUAL PRESENTATION

The Dicastery for Institutes of Consecrated Life and Societies of Apostolic Life (DICALSAL) in the document *Economy at the Service of the Charism and Mission*, n. 58 established that:

The General Chapter prepares and approves an “economic procedures manual” or other similar text, which, also in the light of the experience gathered over time, promotes a way of proceeding that is, as much as is feasible, in conformity with the institute’s charism, its mission, and the guidance of poverty.

The 47th General Chapter in 2018 entrusted by decree to the Superior General with the consent of his Council, to prepare and approve the Congregation’s Financial Regulations or Directory, after consulting the General Synod (Decree n. 1).

The draft document was prepared and presented to the 16th General Synod in 2022, and after incorporating the suggestions, it was finalized and approved by the Superior General with the consent of his Council in September 2023.

The text of this Directory incorporates the values, norms, and customs of our Congregation in matters related to the administration of its assets, with particular reference to our vow of poverty. It will serve as a resource and guide for all the members of the Congregation and will be especially helpful to the Local and Provincial Superiors and formators (cf. DICALSAL, *Economy at the Service of the Charism and Mission*, n. 62; CP General Regulations, n. 113).

I thank all those who contributed to this project with their critical suggestions, and appreciate the work of the General Procurator, Fr. Alessandro Foppoli who coordinated the realization of this Directory.

Retreat of Sts John and Paul, Rome
8 December 2023


~ Fr. Joachim Rego, C.P.
Superior General

PART ONE

The principles and values
which direct our life of poverty.

1. THE FREEDOM TO FOLLOW CHRIST EVEN TO THE TOTAL GIVING OF ONESELF.

“Christ Jesus, who, though he was in the form of God, did not regard equality with God something to be grasped. Rather, he emptied himself [...] becoming obedient to death, even death on a cross.” (Phil.2, 5-8) No one took away his life; rather, he freely surrendered it because he had the power to give it up, and to take it up again; but more so, because there is no greater love than this: to give up one’s life for one’s friends.

Recognizing this freedom in Christ to lay aside everything in order to become like a slave, we Passionists have also freely renounced our claim to our property through the vow of poverty because we wish to share in Christ’s total surrender on Calvary. Therefore *“we strive...to characterize our lifestyle by an attitude of genuine detachment and proper use of temporal goods”*.¹

2. WE GIVE OURSELVES GRATUITOUSLY.

“Without cost we have received; without cost we are to give”.

The invitation to live both spiritually and materially as poor persons may cause us some insecurity and want, but our trust is entirely in God who does not abandon us; but rather continues to provide for us by means of those persons who with a selfless generosity accompany us in serving the Kingdom (our families, our friends, our co-workers, our benefactors). Thus it

¹ Const., 10.



is that “*We accept each day as it comes as a gift from the Father, without worrying about amassing treasures for the morrow*”.² This spirit of poverty, the fruit of Christ’s grace, disposes us especially for the service of all persons with a corresponding gratuitous generosity, in response to the good things which we have received from God and our neighbor.

3. A COMMITMENT TO LIVE IN COMMUNITY AND FOR THE SAKE OF THE MISSION.

The consecration of our lives as Passionists means living our profession of the evangelical counsels in the religious community, under a lifestyle which fosters the proclamation of the Gospel of the Passion of Jesus as the greatest act of God’s love. Evangelical poverty is at the heart of our community life; it is the basis for our consecrated life and for the characteristic Passionist mission and proclamation. Our practical witness to God’s love in handing over the Son for the sake of all, is found in our decision to use our goods responsibly, to place all of our resources justly and honestly toward the good of all, and to have a sense of solidarity with the poor and needy who knock on our door. In practice, how we are using and managing our personal, community and congregational resources will shape the judgment of God and of the world on the quality of our proclamation and our mission since we are convinced that the spirit of poverty, the fruit of grace, makes us more willing to serve all others.

4. A PROFOUNDLY CHARISMATIC VALUE.

Poverty has been, from our origins, the dynamic principle of our charism. Our very name, “*The Poor of Jesus*” made poverty

² Const., 10.

the distinctive hallmark of the Congregation.³ This poverty obviously includes all that the vow contains, but it also demands much more: self-abnegation, the proper use of temporal goods, and the total detachment from all created things. Saint Paul of the Cross loved poverty, and he very highly encouraged it. In the oldest text which we have of his Rule, we find two beatitudes from his own hand: “*Blessed is he who freely puts aside all things so that God may transform him through his most holy Love. How blessed is that soul which faithfully strives to love holy poverty, and to be detached from all created things, so that God may transform it by his most holy Love*”.⁴

5. A COMMITMENT WHICH CALLS FOR ONGOING FORMATION.

From the first years of the Congregation, concern for poverty has been a part of our formation, it is one of the fundamental pillars of Passionist spirituality. This is not simply about “how we live,” but rather “who we are.” This is the heart of our identity and our being conformed to Christ Crucified: “It is no longer I that live, but Christ who lives in me...” Therefore, to live evangelical poverty in community is not something which happens automatically or immediately. On the contrary, it requires a personal, and the community’s, progressively closer bond with the poor Christ, in order to be authentically ready for the mission.

³ “The first name he gave his community was “*The Poor of Jesus*.” This was to indicate that their lives were to be based on evangelical poverty, which he held to be so necessary if they were to observe the other evangelical counsels, to persevere in prayer, and to preach the Word of the Cross in season and out of season” (Const., 1).

⁴ Cf. L. RAVASI, *Regole e Costituzioni dei Passionisti*, R. 1936, Cap. XIV.



6. COMMUNION, SHARING AND MUTUAL SERVICE.

As Passionists, subject to the common law of labor, we commit ourselves to work in order to contribute, according to our abilities, to the daily life of all.⁵ By the vow of poverty, we commit to live together, sharing all in a community of life, in a simple and modest life, and working to overcome the worldly mentality characterized by possessions and domination. We understand that communion and sharing are our true riches, and therefore, we place ourselves, our talents, our labor, and our responsibilities at the service of the community and our mission.

7. DEPENDENCY ON AND CONFIDENCE IN GOD'S PROVIDENCE.

One of the aspects of evangelical poverty is “dependency” on others, and on God. Although there is in us an innate need to be “independent”, to have power and control over ourselves and others, our religious consecration asks us to have confidence in God, in divine providence, and in our communion with our brothers. Behind the temptation to acquire money and things for oneself alone lies fear, and the need to keep one's own destiny well under control. However, this is contrary to our vow of poverty. Detachment from earthly things makes us grown in interior freedom so that we may love God and our neighbor more authentically. Evangelical poverty challenges us to have greater confidence in God in fulfilling our mission.

8. AGAINST THE SEEKING OF AN ABSOLUTE FINANCIAL INDEPENDENCE.

The different cultural contexts which make up an international Congregation like ours will at times make it difficult to provide everyone with a uniform setting by which to express

⁵ Const.,11.

the dependence of each religious on his community with regard to the use of community resources. Nevertheless, it should be evident that living in a manner which allows the exercise of **a total independence** in the use of one's resources is completely contrary to the Passionist spirit, and it is a pejorative witness to the Church and to the world.

9. THE COMMUNITY DEPENDS ON EACH OF ITS RELIGIOUS, on their work, on their talents, to carry out its life, and to engage in its proper mission. That is why the stipends and donations which we receive through our own efforts and through the generosity of others, are destined for the community, which depends on them to satisfy the basic needs of all the brethren, and to provide for the works of the community.

Each religious is called to actively collaborate in, and contribute to the common good, sharing the fruit of his own work with his community, and allowing the brethren to also benefit from the good work he has done. No one can claim as his own any monies acquired by his personal initiative and independently of his work within the community.

10. THE RELIGIOUS DEPENDS ON HIS COMMUNITY, on the basis of a *principle of equity*: every religious should be able to utilize those resources which provide for his fundamental needs. Both justice and equity should guarantee that all the religious should feel equally respected in their dignity, and supported in their need, without discrimination nor unjust differentiation. Nevertheless, we should always avoid giving scandal to the poor and those who live in the vicinity of our communities by adopting expensive or comfortable lifestyles, which are in contrast with the vows which we have professed.



11. SOLIDARITY WITH THOSE IN NEED.

As Passionists of the 21st century, we believe that our mission today flows from our listening to the world, to the cry of the poor, and to the voices of our brothers in community; and as the magisterium continually urges us, from our entry into the many existential and geographic peripheries of our time.

We are convinced that the quality of our *memoria passionis* depends on the attention which we dedicate to the poor, as Paul of the Cross taught us when “he saw the name of Jesus written on the foreheads of the poor”. Jesus assures us that we will always have the poor with us and it is possible to do good to them whenever we want (Mark 14:7). This means that the presence of poor and needy people around our community appeals to our personal and community willingness and sensitivity. To what extent are we willing to share our resources with those in need? The poor challenge us to put offer not only our goods but also ourselves and our time to alleviate their suffering. It is also important that this assistance we give to the poor, whether material or personal, be not entirely improvised or dependent on an individual; rather, it should be with the support and coordination of the community.

Each of our religious should feel challenged by the **cry of the poor**, which he encounters in daily life. Furthermore, he should challenge his community toward real and practical solidarity with those most in need when community decisions are being made concerning the community’s use of its resources.

12. JUSTICE IN THE USE OF MATERIAL GOODS AND HUMAN RELATIONS.

Our poverty demands not only striving for *equity among the religious*, but the protection of the principle of justice in all of its forms as well. Justice with respect to civil laws in financial matters, in the fulfillment of contractual obligations, in the

respect paid to the rights of workers. Justice in the maintenance of transparency and honor in the rendering of an account for goods in one's care, whether personal or that of the community. Justice with regard to the Church in administering the ecclesiastical properties which are entrusted to our Congregation. Justice also with respect to the financial choices we make in social settings where life is often marked by poverty and want.

13. CARE FOR CREATION.

We make our own the appeal of Pope Francis to respond to the “*cry of creation*”, which is repeatedly more characterized by the ecological crisis; to try to achieve “*moderation and the capacity to be happy with little;*” and within a lifestyle which knows how to “*appreciate each person and each thing, learning familiarity with the simplest things...able to shed unsatisfied needs, ... living on little, they can live a lot, ... cultivate other pleasures and find satisfaction in fraternal encounters, in service, in developing their gifts, in music and art, in contact with nature, in prayer*”.⁶

Our poverty also responds to the desire for a greater respect for the common home which the Lord has entrusted to us.

⁶ *Laudato si'*, n. 223



PART TWO

Principal financial procedures and practices of our Congregation.

A) EACH RELIGIOUS

14. POVERTY IN THE LIFE OF THE RELIGIOUS.

Each Religious has been called to a personal expression of his belonging to the Congregation and his vow of poverty through a simple, sober lifestyle; one far removed from a consumer mentality, and responsive to the needs of the poor. This means that we should maintain a correct use of material possessions, avoiding any form of waste or negligence; and similarly, avoiding any form of profit, luxury, or accumulation of material goods.⁷

15. THE DECLARATION MADE BEFORE NOVITIATE.

Each Province, Vice-Province or Vicariate must ensure that among the documents completed before entry into the novitiate, there must also be a waiver in which the candidate declares that he will demand nothing of the Congregation in return for any activities which he may have carried out in the community should he either choose to leave or be dismissed from the novitiate.⁸

16. RIGHTS AND OBLIGATIONS OF THE RELIGIOUS WHO HAS PROFESSED VOWS.

Following his profession, every Religious has the right to receive from the community those means which are necessary, according to the Constitutions, to realize the objective of his vocation; he should want for nothing which is necessary to live with dignity and to carry out his apostolate. Nevertheless, by

⁷ Const.,10; 175

⁸ GR, 47.

his profession, he also assumes the obligation to actively share in the maintenance of the community and its apostolic activities; this he does through his work and what he personally earns, according to his abilities. In a spirit of poverty, each religious commits himself to work diligently in order to make his personal contribution to the life of the community. In any case, our Constitutions recommend that to the degree possible, *“we try and maintain detachment from whatever is given to us for our ministries to others. We aim at sharing with them the message of the Cross in a disinterested attitude of generous service”*.⁹

17. COMMUNION OF GOODS IN THE COMMUNITY.

All that we acquire through our own activity or for the ends of the Congregation, anything offered by benefactors under any entitlement, and all personal benefits and pensions granted or received after profession, are accepted in the name of the Congregation.

In this sense, even personal salaries, or the fruit of one’s pastoral ministry should be accepted by each religious as something pertaining to the Congregation and for the Congregation; it should be used for the good of the community.

18. THE DUTY OF TRANSPARENCY IN THE USE OF ONE’S PERSONAL PROPERTY.

The Religious is called to actively participate in the upkeep of the community and its apostolic works by his work and his personal earnings. In our Congregation, the customs and traditions vary with regard to providing the Religious with access to money for his personal needs. What matters is that everything be done transparently and responsibly by the religious and with dependence on the Superior. It is not permitted that

⁹ Const., 170.



any Religious hide or set aside financial resources, without the knowledge of his Superiors.

19. PARTICULAR PROHIBITIONS.

Religious are prohibited from exercising the following actions: the administration of goods belonging to lay persons, or to hold a secular office which carries with it the obligation of accountability without the explicit permission of the Major Superior; to stand as surety, even with one's personal property, without first having consulted the Major Superior; to sign documents by which one assumes the obligation of payment of a sum of money without a precise reason¹⁰; to carry out forms of commerce or business, whether personally or through others, without the permission of the legitimate ecclesiastical authority (c. 286).¹¹

20. CESSION OF ADMINISTRATION, USE AND USUFRUCT OF THE PERSONAL PROPERTY OF THE RELIGIOUS.

The Religious renounce the free disposition of the personal property which they possess before entering the Congregation, or of any such property which they may receive in the future by inheritance.¹²

Before profession a document should be prepared to provide for the relinquishment of the administration of personal property, and to assign its use and usufruct. A will should be prepared at least before final profession.¹³ These documents should be valid in civil law. In order to modify these arrange-

¹⁰ CJC 285.

¹¹ CJC 286.

¹² CJC 668 § 3; Const., 12, 14

¹³ CJC 668 § 1.

ments, and to effect any other act in relationship to one's personal property, the Religious require the permission of the Provincial Superior.¹⁴

21. RENUNCIATION OF ONE'S PERSONAL PROPERTY BY THE RELIGIOUS.

It is possible to renounce ownership of one's personal property according to the norms of the Provincial Authority, and with the permission of the General Superior. The renunciation should be valid in civil law.¹⁵ This renunciation of ownership is not obligatory; rather it is optional, and the effects are applicable only to the property itself; the act of renunciation does not affect the capacity to possess other personal property which may be received in the future.

22. RELIGIOUS WHO ARE LEGITIMATELY ABSENT FROM THE COMMUNITY.

Those Religious who have requested and received from their legitimate Superior permission to absent themselves from the community (*extra domo*), according to the reasons foreseen by our law¹⁶, remain members of our Congregation in every respect; they are bound by the vow of poverty, and are subject to the care of their respective Superiors. This also applies in the financial aspects of their lives.

In the decree by which the permission for legitimate absence is granted, the Superior should state clearly how the Religious should conduct his life with respect to the vows of poverty and obedience. This means that provision should be made for the means by which the Religious should support himself during the time of legitimate absence; whether he should account for the management of his goods or the money he receives from his employment, and how that accounting should be done.

¹⁴ CJC 668 § 2; GR, 119.

¹⁵ CJC 668 § 4.5; Const. 15.

¹⁶ For reasons of the apostolate, study, health or for vocational discernment, GR 103.



Without these specific instructions, the permission is not legitimate.¹⁷

23. RELIGIOUS WHO ARE EXCLAUSTRATED.

Those who have requested and received an indult of exclaustation, according to the law, remain members of the Congregation with all rights and obligations, except for those which are incompatible with their new condition. Superiors are obligated to demonstrate pastoral attention to those who are exclaustated, providing attentive care and, if necessary, appropriate financial subsidy. Nevertheless, to the extent possible, the one who is exclaustated should be actively committed to providing for his personal needs. If proper law does not provide specific guidelines, it belongs to the General Superior to define, in writing, what guidelines are appropriate to the case.¹⁸

24. DEPARTURE OF RELIGIOUS FROM THE CONGREGATION.

Religious who legitimately leave the Congregation, or have been dismissed, cannot demand anything from the Institute. Nevertheless, the Church recommends that these Religious always be treated fairly and with evangelical charity, especially if they may not have their own means of subsistence, or be advanced in age.¹⁹ Therefore, when a Religious decides to leave the Congregation, the Provincial Superior, with his Council, should consider the possibility of offering him some financial assistance as dictated by justice and charity, so that he might begin this new stage of his life in a respectable way.

¹⁷ GR, 73.

¹⁸ cf. CIVCSVA, *The Gift of Fidelity, the Joy of Perseverance*, nn. 70-72.

¹⁹ CJC 701.

B) THE RELIGIOUS COMMUNITY

25. OVERALL CONSIDERATIONS IN THE ESTABLISHING OF A COMMUNITY.

The common law requires that for the canonical erection of a community, “*those things which are required to carry out properly the religious life of the members according to the proper purposes and spirit of the institute*”²⁰ are assured.

With regard to the building in which the community resides, our own proper law recommends that the “*spirit of poverty, simplicity, solitude and prayer which are characteristic of our charism*”²¹ be respected both in the construction of a new house, as well as in renovations to one already existing.

26. THE DUTY OF THE ENTIRE COMMUNITY TO WITNESS POVERTY.

The property of the Congregation assures and safeguards support for the Religious and the exercise of the apostolate. Each community is called to give the most eloquent witness to poverty, by properly and carefully using all of those economic resources which are available²² and by consideration of how to place its resources at the service of the needy.²³

27. THE LOCAL ECONOME.

Each community should have an administrator who is normally different from the Superior.²⁴

Provincial norms should indicate the manner of provision of this office; and the duties pertaining to this office as an administrator, always under the responsibility of the corre-

²⁰ CJC 610.

²¹ GR, 6.

²² CJC 640, Const., 175.

²³ GR, 14.

²⁴ CJC 636 § 1; Const., 165



sponding Superior. The local Econome should present a quarterly report to the community on the accounts of the house; at the end of the year, the report is made to the Provincial Superior.²⁵ The Provincial Superiors and the Provincial Economes should take care to see that the local communities submit these annual administrative reports on time.

28. TRANSPARENCY IN ADMINISTRATION.

The 46th General Chapter (2012) noted the importance of *financial transparency* as a requisite which flows from our vow of poverty.²⁶ Accordingly, transparency should be the starting point when drafting periodic administrative reports. The lack of transparent and objective information in the economic/financial ambit will make the appropriate supervision and control by the Superiors all the more difficult. Furthermore, it may also create among the Religious a lack of confidence in the persons who administer the goods of the Community; and generate the feeling that there is a lack of responsibility regarding the use of community property, and a general disinterest in this important dimension of our lives.

29. SPENDING LIMITS FOR THE LOCAL SUPERIOR AND THE LOCAL ECONOME.

Each community is called to administer its own resources and property, whether fixed or mobile, by means of a careful administration, directed by the Local Superior and the Econome, and under the supervision of the Provincial Council.

²⁵ GR, 128.

²⁶ “*The General Chapter decrees...That foremost in the criteria on both the level of local entities and of the wider Configuration itself is that they must take into consideration the demands the vow of poverty make upon each religious. This reveals itself in terms of financial transparency and the need for open and factual representation of the various bank accounts and investments made, whether by individual religious (treasurers, local economies, etc.), local communities, or the administration of each local entity or the Configuration itself.*” (cf. 46th Gen. Chap., Book I, Approved Proposal n. 8).

The Provincial Superior, with the consent of his Council, will determine the amount of an expenditure that will require the Local Superior's consent of the Local Chapter, or of the Provincial Superior.²⁷

30. CUSTODY OF VALUABLE OBJECTS.

Valuable objects will be diligently safeguarded and inventoried; the inventory should be in two copies, one for the local archive and the other for the Provincial archive.²⁸ To alienate valuable objects with an artistic or historical value, or goods received by the Church as votive offerings, the permission of the Holy See is required. It is absolutely prohibited to sell sacred relics.²⁹

31. THE SALE OF REAL ESTATE AND VALUABLE OBJECTS.

Local Superiors are prohibited from selling the real estate owned by the house.³⁰ Furthermore, they are prohibited from renting out real estate; or selling objects of value including those of artistic, historical, or cultural importance, without having heard the opinion of the Local Chapter and without the consent of the Provincial Superior; and when called for by law, the consent of the General Superior or the Holy See.

32. SUBSIDIARITY IN THE CONGREGATION
AND ASSISTANCE TO THE POOR.

Each community has the duty of offering financial assistance to the Provincial Administration, according to the norms established by the competent authority,³¹ and in the case of special need, assist other communities in the Province and in the

²⁷ GR, 125. The Provincial Superior should establish these limits to expenses, in accord with the determinations made by the General Superior for the maximum quantities allowed to a Province.

²⁸ GR, 120.

²⁹ CJC 1190 § 1.

³⁰ GR, 121.

³¹ Const., 177.



Congregation. To the extent possible, some part of the physical resources should be dedicated to the service of the needy, while maintaining their Passionist character, the nature of the house, and any norms provided by Provincial Authority.³²

33. EMPLOYEES AND OTHER PERSONNEL.

With regard to those persons whose relationship with the community and its institutions is based on work, we should act always justly, respecting the civil laws that provide protections to the workers, and honoring contractual norms regarding employment and salaries.³³ Employees should be paid a just and honest wage so that they may provide reasonably for their own needs and those of their families.³⁴

C) RESPONSIBILITIES AND DUTIES

34. THE SUPERIORS ARE THE FIRST ONES RESPONSIBLE FOR FINANCIAL ADMINISTRATION.

Responsibility for the administration of the Congregation's goods belongs to the Superiors, who should help the Religious to fulfill their vocation by using the goods of the Congregation for the proper ends of its mission. The Superior General has jurisdiction over all the goods of the Congregation³⁵ and the rest of the Superiors have that jurisdiction within the ambit of their office³⁶. The owner of the Congregation's goods is the juridical person which legitimately acquired them³⁷, in our

³² CJC 640, GR, 14.

³³ CJC 1286.

³⁴ *Economy at the Service...*, n. 92.

³⁵ CJC 622; Const., 109.131.

³⁶ The Provincial in the Province (CJC 622; Const., 103 § a.109.151) and the Local Superior in the house (CJC 622; Const., 165).

³⁷ CJC 1256.

case, the Province or the religious house. Administration belongs to the owner³⁸. Given that the owner is a public juridic person, the administration is carried out by its representatives, i.e., the Superiors and those who carry out administrative activities in their names and under their mandate, i.e. the Economes.

35. THE DISTINCTION OF FUNCTIONS
BETWEEN THE SUPERIOR AND THE ECONOMOME.

The administration of the goods of the Congregation, in its different levels (General, Provincial, Vicariate, Local), is entrusted directly and immediately to the Economes, who, enjoying the autonomy necessary for the exercise of their charge, always remain subject to their respective Superiors, and under their direction, according to the dispositions of universal and proper law, and in accord with the governing laws in each country. Church practice dictates that the role of Econome, at whatever level, should always be entrusted to a professed member of the Institute. This does not preclude him from using lay professionals in the fulfillment of his office.

36. THE INCOMPATIBILITY OF FUNCTIONS OF THE MAJOR SUPERIORS.

A Major Superior (General or Provincial) is prohibited from simultaneously discharging the duties of the Econome. This rule should also be observed, to the degree possible, at the local level. Furthermore, it is recommended that there be a term of service for the duties of the Econome, as occurs for the Superiors, so that there is also an appropriate turn-over of persons in this sensitive work³⁹.

³⁸ CJC 1254 § 1.1255.1256.

³⁹ *Economy at the Service...*, n. 64.



37. VIGILANCE AND CONTROL IN THE FINANCIAL ADMINISTRATION.

Each Superior is responsible for and should be vigilant that the acts of administration are carried out in conformity with the law (both civil and ecclesiastical) and that required permissions are received. Once completed, there should be a timely accounting for them.

38. CRITERIA FOR FINANCIAL SAFEGUARDS.

Each entity or Configuration should establish criteria for financial safeguards and for the administration of accounts, and these should be approved by the General Superior.⁴⁰

39. FINANCE COUNCIL OR COMMISSION.

Given the importance of administrative acts for the life of the Congregation, especially with regard to cases of extraordinary administration, it is essential that one act prudently. Therefore, for these most important acts, our norms call for the Superior to be assisted by an administrative council, having at least two advisors, who will be able to assist him with their advice, and, if necessary, their consent.⁴¹ In our Congregation, the administrative council is usually the same Council which assists the Major Superior in governing at the Provincial or General level.⁴² Nevertheless, Provinces, Viceprovinces or Vicariates, may establish in their Regulations the existence of a Financial Commission to assist in this task; they may also provide for a collaboration with lay specialists in these matters.⁴³

⁴⁰ 46° Cap. Gen., n. 8

⁴¹ CJC 1280.

⁴² CJC 627.

⁴³ Const., 124.

40. THE ECONOMES IN GENERAL.

The Economes are collaborators with the Superiors, and they work under their direction in carrying out the administration of the life of the Communities and Provinces. They should have received the necessary preparation for carrying out their office. The Economes enjoy the faculties necessary for the effective discharge of their duties, in accord with common and particular law. In the ambit of their activities, they may exercise ordinary administrative acts within the limits allowed to the Superior on whom they depend.⁴⁴

41. THE GENERAL ECONOME.

He is named by the General Superior with the consent of his Council at the start of each mandate; he may be relieved of office during the six-year mandate. He is an *ex officio* member of the General Chapter and of the General Synod. Ordinarily, he is called to the meetings of the General Council, with a consultative voice, whenever issues relative to the administration of the goods of the Congregation are being studied. His specific functions are described in the General Regulations⁴⁵:

- a. To prepare the report on the financial state of the Congregation, submit it to the General Superior for approval, and present it to the General Chapter.
- b. To send to Provincial Economes and administrators useful reminders for fulfilling the directives for the prudent administration of goods issued from the generalate.
- c. To update, every three years, the inventory of investment securities, valuable objects, and all other goods belonging to the Congregation as a distinct juridical person.
- d. To present a report on his administration to the General Council at least twice a year.

⁴⁴ CJC 638. Const., 173

⁴⁵ Cf. RG 91.



- e. To prepare the annual budget three months before the start of the fiscal year, and to present it to the Provincial Curias.
- f. To present to the General Superior and his Council the report on the financial status of the Provinces which is based on the reports sent to him by the Provincial Economes.

42. THE PROVINCIAL OR VICE-PROVINCIAL ECONOMOME.

The Provincial or Vice-Provincial Econome has responsibilities for his administration which are like those which have been established for the General Econome. He is ordinarily called to the Provincial Council, with consultative voice, when matters are taken up which relate to the administration of goods.

Each Province will determine which areas are the concern of the central administration or the local administration; in so doing, they shall keep in mind the authentic needs of the houses and the general objectives of the Province.⁴⁶ The Provincial or Vice-Provincial Econome should prepare the annual financial report of the Province and send it to the General Econome.⁴⁷ This annual report for the General Curia should be compiled from the reporting forms decided upon by the General Econome.

43. CONSULTORS AND QUALIFIED EXPERTS.

The help of qualified experts can help the Superiors and Economes in administering the patrimony of the Congregation, improving transparency and trustworthiness in the administrative reports, and offer suggestions. Our particular law foresees the possibility of inviting consultants, experts or specialists to Chapters and Councils (both at the General and

⁴⁶ GR, 115.

⁴⁷ CJC 636§2; GR, 105.

Provincial levels), where they might offer support to the administration of the goods of the Congregation (GR/78).⁴⁸

*In choosing external professionals, one should seek those who are knowledgeable of the specifics of the institutes and who are experts in the respective arena, avoiding rash recourse to a single professional. It is important that, to the degree possible, [the] professional relationship should... be finalized with clearly written contracts and established timeframes.*⁴⁹

44. LEGAL REPRESENTATION.

The legal representative acts in the name of the juridic person of the Congregation, with the competency established by universal or particular law, or by his own, proper statutes.⁵⁰ *“The legal representative acts always and only within the limits of his/her mandate: he/she can perform the acts of ordinary administration. For extraordinary acts of administration, he/she needs authorization from the competent Superior. On the other hand, when he/she acts without a mandate, either against or beyond it, he/she no longer represents the institute.”*⁵¹

The particular norms of each nation should be respected in the matter of the registration of the legal representatives, and the publication of public notices attesting to the existence of the juridic person and its legal representative. Every individual authority given to the legal representative should always be conferred in writing, it should be precise and complete in its content. Furthermore, for reasons of the appropriate division of responsibilities, the Holy See has indicated that it is preferable that the legal representative be a different person than

⁴⁸ GR, 78.

⁴⁹ *Economía al Servicio...*, 66.

⁵⁰ CJC 118.

⁵¹ *Economía al Servicio...*, 65.



the Superior or Econome, unless civil legislation disposes otherwise.⁵² By maintaining this difference, it will also be easier to assure impartiality in the exercise of vigilance and control over the acts performed by those who legally represent our Congregation.

In any case, our Constitutions foresee that the Provincial Superior with his Council, or someone whom they may have delegated, may exercise the acts of financial administration and the legal representation within the established limits.⁵³

45. MAXIMUM AUTHORIZED AMOUNTS.

Each Superior acts within ordinary administration for the purposes of purchases, sales, indebtedness, loans, and other types of binding obligations, and other administrative acts up to an amount established by his legitimate Superior. When an intended administrative procedure surpasses these amounts, the administrative act passes from being ordinary to extraordinary, and the permission or consent of the higher authority is needed.

The General Superior, with the consent of his Council, sets the amount which he, himself, can spend without the consent of his Council.

The Provincial Superior, with his Council, should determine the amount which he may spend without the consent of his Council; as well as the amounts which the Local Superiors will be allowed to spend before requiring the consent of the Local Chapter or of the Provincial Superior.⁵⁴

⁵² *Economía al Servicio...*, 65.

⁵³ Const., 174.

⁵⁴ GR, 125. In setting this amount, what is said in this Manual at n. 47 should be kept in mind.

PART THREE

SPECIAL TOPICS AND PROCEDURES

46. GENERAL NORMS FOR OUR CONGREGATION.

The Congregation, Provinces and Viceprovinces, Regional Vicariates, and those houses which have been canonically erected enjoy juridic personality: they have the right to acquire, possess, alienate, and administer temporal goods, according to law. Those houses which have not been canonically erected (residencies, mission stations) are not juridic persons.

Ownership of the temporal goods of the Congregation should be registered in the name of the moral person to which they belong. If they should have to be registered in the name of a Religious, a civilly valid document must be drawn up at the same time which will safeguard the rights of the Institute.⁵⁵ Administrative acts should be done in accord with civil laws.

47. ORDINARY AND EXTRAORDINARY ADMINISTRATION

How are ordinary and extraordinary administration distinguished?

In general, an extraordinary administrative act is defined as one which, in order to be executed, is required by law to have the authorization of a higher authority: The Provincial Superior with his Council for local administration; the General Superior with his Council for Provincial administration; the Holy See for the General Government.

All of the expenses which are included in the annual budget are part of the ordinary administration once the budget has been properly approved. Those acts which are not included in

⁵⁵ GR, 116.



the annual budget are extraordinary, and they additionally require the consent of the Major Superior.

Without this approval, the extraordinary administrative act is invalid. Nevertheless, this authorization, or permission, does not imply the assumption of responsibility for the authorized act by the one authorizing. In any case, the one who acts, even under the permission or mandate of the Superiors, should observe what is required in law.

Limits to spending for extraordinary acts of administration.

The 47th General Chapter decreed that:

- For the validity of sale or any other business by which the patrimonial situation of the Congregation could be subject to detriment, the sum of which exceeds that established by the Holy See for the individual countries, in addition to the provisions of the Provincial norms, the written permission of the Superior General with the consent of his Council and the approval of the Holy See is required.
- The same procedure is always required for the sale of votive gifts made to our churches and valuable objects of historical or artistic value.
- For a sale and other juridical transactions whose sum exceeds 60% of that established by the Holy See for individual countries, in addition to the provisions of the Provincial norms, the written permission of the Superior General with the consent of his Council is required.
- Similarly, to spend a sum whose amount exceeds 60% of that established by the Holy See for sales (as mentioned above), in addition to what is established by Provincial norms, the written permission of the Superior General with the consent of his Council is required.

For all other operations which are not included in these determinations, Provincial norms shall be followed.

48. EVALUATING THE SUSTAINABILITY OF WORKS.

The Church recommends that Religious Congregations carry out a careful evaluation of the *works* they carry out in order to determine their sustainability and viability in the light of three criteria:

- a) the charismatic dimension and planning for the future: Do the works and structures which we operate as Passionists respond to our Charism and to the mission which the Church has entrusted to us? Do they favor or impede our ability to plan for our future?
- b) the relational and fraternal dimension: Do the works and structures which we operate as Passionists respect the dignity of those who are engaged in them? Do they foster fraternal relationships, communion, co-responsibility? Are they in line with our vocation to a community life?
- c) economic sustainability at the service of the charism: Are the works and structures which we operate as Passionists economically sustainable in order to benefit the promoting of our charism? Are they well-organized and efficient from an administrative viewpoint?

49. THE STABLE PATRIMONY.

What is stable patrimony?

Stable patrimony is the combination of non-movable goods (buildings and structures/“real property”) and movable goods (economic resources, funds, valuable objects, etc.) which assure the survival of the Congregation in its different levels: General, Provincial and Local (in so far as communities have been canonically erected as juridic persons). The loss of or reduction of the stable patrimony harms the Congregation and places its survival at risk. That is why the Holy See urges each Congregation to clearly define the goods which make up its



stable patrimony, so that the Congregation make take special care to protect it.

The task is to define *which are the goods without which the Congregation, the Province or the Local Community* would not have the means necessary to achieve its ends and to fulfill its proper mission.

What goods may be included in the stable patrimony?

The Holy See gives five kinds of goods which may be included in the stable patrimony:

- a) *Non-movable goods in which our Religious live or work*, places where our elderly Religious are cared for, places of historic or particular charismatic value, the motherhouse of the Congregation, etc. This designation, naturally, should consider our real capacity to administer and maintain said non-movable goods for the future.
- b) *Non-movable goods which produce income for the support of the Congregation*. In this case, it is prudent to avoid having these goods become the only ones on which the survival of the Congregation, the province or the local community come to depend.
- c) *Movable goods* (funds, economic resources, deposits) which serve to support the Congregation, the province, or the religious house; or which provide for the development of its missionary activity. Not to be included in the stable patrimony are those funds or movable goods which are used to carry on the ordinary financial activity.
- d) *Non-movable and movable goods which have a particular historic and cultural value*, or which make up part of the historical memory of the Congregation, of the Province, or of the religious house.
- e) *The special fund maintained for the protection and security of the Congregation in its different levels* (General, Provincial, Local) against significant economic peril.

Who assigns the stable patrimony?

The General Regulations establish that the assignment of goods to the stable patrimony is done at General, Provincial and Local levels.⁵⁶ At the General level it belongs to the General Chapter or to the General Superior with the consent of his Council.

At the Provincial, Vice-Provincial, Vicariate and Local (for the communities canonically erected) levels, this assignment is done by the Provincial Chapter or Congress and is confirmed by the General Superior with the consent of his Council.

When the laws of the State permit the civil recognition of the stable patrimony, it is recommended that that procedure be followed when the stable patrimony is defined. In any case, it would be useful that, during the presentation of the goods assigned to the stable patrimony for confirmation to the Superior General and his Council, that the list of said goods be accompanied by a precise description and inventory; and in the case of non-movable goods (real property), there also be included an indication of potential constraints to the property, the kinds of structures, and how well they have been maintained.

50. DEBT AND CREDIT.

If debts are contracted by a juridic person, even though it was with the permission of the Superiors, the juridic person should answer for them. If they are contracted by a Religious on the basis of his personal goods with the permission of the Superior, the Religious should answer for them. If debts are contracted in doing the work of the Institute with the mandate of the Superior, the Institute is responsible for them. If debts are

⁵⁶ GR, 113.



contracted by a Religious without the permission of the Superiors, only the Religious is personally responsible for them. Superiors should take care to not contract debts which may not be satisfied with any certainty through the usual income.⁵⁷

Anyone who has contracted debts which he is unable to pay may not be admitted to the novitiate.⁵⁸

Ordinarily, money is not to be lent.⁵⁹

However, when it is necessary to give a loan, it is up to the legitimate Superior to grant it, while observing the norms for extraordinary expenses, and with a civilly binding guarantee of re-payment. The Religious may not arbitrarily administer goods nor make loans.

The Provincial with his Council should establish at the beginning of his four-year term those sums for which the Local Superior will require the consent of the Local Chapter or of the Provincial Superior. The Provincial, with the consent of his Council, is authorized to make loans according to the sums set forth by the General Superior.⁶⁰

51. BUDGETS.

The financial budget is a fundamental tool for managing the financial operations at any level (local, provincial, general, parochial, etc.). It requires the community's efforts ahead of time to prepare it; a sense of obedience in order to follow it throughout its term; and a regular evaluation to consider any variances from it, and the causes for the variances so that they may be corrected.

⁵⁷ CJC 639.

⁵⁸ CJC 644.

⁵⁹ GR, 123.

⁶⁰ Const. 120.121.174

The General Econome will prepare the annual budget three months before the start of the fiscal year and will present it to the Provincial Curias. The Provincial and local Economes will do the same for their sectors, according to Provincial norms.

52. TO ACQUIRE, TO POSSESS.

According to the norms of can. 668, everything which a Religious acquires by his work, or by his skill and industry, belongs to the Congregation. The same is also applied to what is received by him as a form of pension, subsidy, or insurance benefit under any entitlement; with the exception of goods received as inheritance from parents or relatives and which will remain as personal property of the Religious.⁶¹ Nevertheless, in the case of inherited goods, the Religious is not exempt from the vow of poverty in their administration, in accord with what our Constitutions recommend.

53. RENTALS AND LOANS (TEMPORARILY TRANSFER).⁶²

A rental consists of the temporary cession or acquisition, for a price, of the use or benefit of things, works and services.

A loan (temporary transfer) consists of the action of temporarily giving or receiving something which can be used, but not destructively, with the obligation to return it. It is distinguished from rent because in this case, there is nothing given in exchange for what is handed over.

The following general rules should be kept in mind:

- a) Real property cannot be rented out without having heard the Local Chapter, and without the consent of the respective Superior.

⁶¹ Const. 12.

⁶² Cf. *Economy at the Service...*, nn. 76-78.



- b) The limits established by the Holy See concerning property values must be respected when property is rented out; if the value of the rented property exceeds those limits, the authorization of the Holy See must be sought.
- c) The administrative documents that accompany these transactions should be drawn up to be valid according to the civil norms.
- d) Ecclesiastical goods cannot be rented out to the administrators or their relatives (including the parents of the Religious), up to the fourth grade of consanguinity or affinity, without the special authorization given by the competent authority.
- e) Rental contracts which will extend beyond 9 years need to be approved by the Holy See.
- f) The Holy See recommends the verification of the purposes for which the real property is to be rented out. They should not be contrary to the ends of our Congregation, or contrary to the nature of ecclesiastical goods; and these purposes should not be variable in time (for example, one of our monasteries cannot be rented out to a group which promotes values or activities which are contrary to Christian morals).

54. ALIENATION, SALE, OF REAL PROPERTY.⁶³

All of the goods which our Congregation possesses and administers are, to all effects, ecclesiastical goods. That is why, even when it is decided to alienate something, it is necessary to consider the norms of the Church as well as those of the respective civil and state authorities. These norms should be followed whatever the value of the real property which is meant for alienation, because in any case it is the good name of the Church which is involved each time that the Congregation acts in the purchase, management, or alienation of goods.

⁶³ Cf. *Economy at the Service...*, n. 80

Some norms and directives to note and to observe:

- a) Consideration should be given, in the first place, to whether the possibility exists of ceding the property to another religious entity. Any alienation which prejudices the common good of the Church should be avoided.
- b) Before beginning negotiations, an independent and competent agency should be approached in order to determine the market value of the real property to be sold; whether there is full and unfettered availability of the real property, that is, the absence of limiting conditions; whether there exists someone's right of first refusal; that the documentation guarantees the validity of title; that the sale recognize the present municipal zoning codes; and what the fiscal consequences of the sale will be.
- c) The reputation of the buyer should be researched; and the appropriate guarantees should be demanded if the buyer is going to pay in multiple installments.
- d) If the sale will be effected through intermediaries, their duties should be given in writing, with close attention to all of the clauses, especially when setting the conditions for any of the steps, and regarding the commission owed to the intermediaries. The Church recommends not having exclusive contracts in issuing mandates.
- e) The selling or renting of ecclesiastical goods to their administrators or to their relatives up to the fourth grade of consanguinity or affinity is prohibited unless a special written permission is received from the competent superior.⁶⁴

*Documentation required
when seeking the permission of the Holy See.*

If the value of the property exceeds the maximum amount established by the Holy See for the separate regions of the world, in order to proceed validly to a sale, the permission of

⁶⁴ CJC 1298.



the Holy See must be sought, through the General Superior. The procedure requires the presentation of the following documentation (through the office of the General Procurator).

- a) Applying Entity (official name of the Entity by which it is recognized by the State).
- b) The object being sold (a description accurately portraying the real property).
- c) Property holder (the name of the religious Province as recognized by the State).
- d) The basis of ownership, that is, under what kind of acquisition was the real property received? Was it purchased; was it donated; was it received through a will? (State whether there was any restriction placed by the donor in the initial donation).
- e) True value of the real property.
- f) Appraisal (prepared in writing by an expert appraiser).
- g) Reasons for the sale.
- h) Full names of the final purchasers.
- i) Full names of the intermediaries and their commissions.
- j) The use planned for the benefits from the sale.
- k) Reference protocol numbers for any other authorizations for sale already granted by the Holy See.
- l) Written permission from the Provincial Council.
- m) Written permission from the General Council.
- n) The opinion, in writing, from the Bishop, Ordinary of the Place, in whose territory the real property under sale is located, stating his approval.

Additional observations

With regard to the use planned for the benefits of the sale, the following must be kept in mind:

- That the Holy See does not authorize sales whose purpose is to supply immediate financial needs without first evaluating the causes which brought about these financial needs.
- That if the sale is being done to pay for debts which the Congregation contracted in the carrying out of its apostolic works, the plan for the restoration of its economic and financial well-being must also be presented to the Holy See.

Anyone who alienates ecclesiastical goods without the required permission should be punished with a just penalty according to law. The possible penalties include a prohibition from residing in a specific place or territory, and the loss of or privation of legal authority, offices, or duties; and the obligation to repair the damage done to the Institute.

55. MASS OFFERINGS.

In these very delicate matters, our Religious are obligated to observe the general ecclesiastical norms, as well as those of their respective Episcopal Conferences. Here are some standards given in our General Statutes.

- a) Any priest who celebrates or concelebrates a Mass may receive its offering; nevertheless, priests are urged to celebrate Mass for the intentions of the faithful, especially the poorest, even without accepting any offering.⁶⁵
- b) The offerings received should be entered into the appropriate register and may not be spent before the Masses

⁶⁵ CJC 945.



have been celebrated; any appearance of business or commerce must be avoided.

- c) The offerings for the celebration of Masses which exceed the needs of the house, should be sent to the Provincial Superior (to help the communities in difficulty); similarly, the Provincial Superior should transmit to the Superior General those Mass offerings which exceed the needs of the Province.
- d) One Mass should be offered for each stipend received, except for what the individual Episcopal Conferences may have established regarding grouped intentions.
- e) Whoever celebrates a second Mass on the same day may not accept any offering for it ⁶⁶; whoever celebrates two or more Masses on a day, whether he is a pastor or parochial vicar, should send the offering for the additional (2nd, 3rd) Masses to the Bishop, i.e., the Ordinary of the Place. All of the other Religious should send the offerings for binated Masses to the Provincial Superior.
- f) On solemnities and on specified days, the Superior is obligated to offer Mass for his respective community (within the ambit of his office as Superior), and the Pastor offers Mass “*pro populo*”.
- g) In any case, the established suffrages must be celebrated. A Mass offering, as everything which the Religious receives for any reason, according to our Constitutions, is received for the community. That means that it does not exempt the Religious from the observance of the vow of poverty, and stipends may not serve to maintain a parallel administration outside the vigilance of the legitimate Superiors.

⁶⁶ CIC 951.

56. FINANCIAL ECOLOGY

In the management of the goods of the Congregation, as with the relations it maintains with employees and other co-workers, the Superiors, Economes and Communities should keep in mind the “ecological” and “social” impacts of their economic and administrative decisions. Pope Francis’ analysis “*suggests the need for an ‘economic ecology’ capable of appealing to a broader vision of reality. The protection of the environment is in fact ‘an integral part of the development process and cannot be considered in isolation from it’... the analysis of environmental problems cannot be separated from the analysis of human, family, work-related and urban contexts, nor from how individuals relate to themselves, which leads in turn to how they relate to others and to the environment.*”⁶⁷

57. COMMUNION OF GOODS WITHIN THE CONGREGATION.

All of the Provinces share the obligation to provide financial support for the General Administration⁶⁸ by means of a contribution which is set by the General authority. This amount considers the measures of each nation’s economic strength and the number of its Passionist Religious. Contributions for extraordinary expenses are determined on the basis of the same criteria.⁶⁹

The principle of solidarity, which has always been a part of our Congregation, has acquired a particular strength in the last decades, because of the creation of the Configurations, which were created in order to achieve a greater solidarity in personnel, in formation, and in finances. We should remember that the Executive Council of the Configurations has juridic personality and may make decisions over financial matters if

⁶⁷ *Laudato si’* n. 141

⁶⁸ Const. 177.

⁶⁹ GR, 127.



there is unanimity of votes. When there is not unanimity, the approval of the General Superior with the consent of his Council is required in order to create a binding decision for the Configuration.⁷⁰

At the Provincial level, all of the houses have the obligation to provide financial help to the Provincial administration, according to norms which the competent authority should establish.

58. SOLIDARITY FUND OF THE CONGREGATION.

In recent years, the Congregation has joined the Formation Fund with the Solidarity Fund; the General Synod of 2015 created the one Solidarity Fund. This fund is supported by the annual contribution of 2% of the gross revenues, and by 7% of the sale income of the juridic persons and the houses of the Congregation, as well as by other donations and particular contributions. The communities which administer the finances of other juridic persons, such as retreat houses, schools, etc., will give 2% of the net income to the Province.

The Synod of 2015 also established the practical rules for drawing from the Solidarity Fund. It means that the request for aid, whether as a loan or as an outright donation, must be approved by the Major Superior, presented before the 15th of April or the 30th of September, to the General Secretary for Solidarity and the Missions, together with the budget of the requesting organization, and any information which supports the request for financial assistance.

59. GUIDELINES FOR AN EFFECTIVE ADMINISTRATION

In multiple General and Provincial Chapters there has emerged an awareness that our Entities should be aided by

⁷⁰ GR, 97c.

tools to encourage and guide the financial administration of the distinct Entities. These tools include the following actions:

- Each Province and Vice-Province should establish its own Life and Mission Plan, which defines the apostolic objectives which it wishes to encourage and achieve.
- Each Province and Vice-Province should create its own Financial Manual, containing the procedures to govern the administration of its own economic resources.
- Each Province and Vice-Province should work to keep all of the communities operating under the annual budget so that it may successfully plan for the use of its resources and monitor the cost of its activities.
- Each Province and Vice-Province should faithfully and regularly report on the financial status of the Province and its local communities.

60. REASONS FOR AND USE OF THIS FINANCIAL STEWARDSHIP MANUAL.

The values and the norms which are contained in this Manual are intended to support our life and mission, both personal and communitarian; they appeal to our vocation, to our responsibility to be a part of a community which lives under “evangelical poverty”; and they reflect our intention to hold to these financial norms as part of our witness to our mission.

APPENDIX #1

RULES FOR THE MANAGEMENT OF THE SOLIDARITY FUND

1. **CONSTITUTIVE ACT:** The fund is constituted the FUND FOR SOLIDARITY. It is the result of a union of the Formation Fund and the Solidarity Fund.
2. **OBJECTIVES:** The objectives of the Fund are as follows:
 - a) to assist all areas of the Congregation where there is a particular need (this includes formation and other objectives);
 - b) to finance projects.
3. **PERMANENT CAPITAL:** The Fund will have a permanent capital amount established each year by the Superior General with consent of his Council.

Each year the Superior General and his Council will determine the amounts to be disbursed or to be re-invested to build up the capital amount.

In order to prevent an accumulation of money, the Fund will not exceed €10m.
4. **EXPERT ASSISTANCE:** An advisory board of financial experts assists the General Econome and Financial Commission in managing and monitoring the investment of the Fund in accordance with an ethical and low-risk policy.
5. **INVESTMENTS:** The permanent capital of the Fund is to be ethically invested in accounts which are appropriately secure.
6. **INCREASE:** The Fund will increase through the contribution of the Solidarity Tax of 2% on the income of each juridical entity and its local communities, through the 7% tax on the sale of land and properties and through voluntary contributions which are received for this purpose.
7. **GRANTS:**
 - a) Each year the Superior General will establish criteria for the maximum amount to be distributed in that year.



- b) Grants for formation in the Congregation are the priority for use of the Fund.
- c) An entity may not receive more than 25% of the disbursement of a particular year.

Normally the principal of the fund will not be used. If some extraordinary situation arises that makes it advisable to use the permanent capital, the Superior General must obtain the consent of his Council. This disbursement may not exceed $\frac{1}{3}$ of the permanent capital. In case more needs to be spent, the consent of the General Chapter or General Synod is needed.

8. **REQUESTS:** The requests for grants from the Solidarity Fund should be first approved by the Major Superior of the entity requesting assistance. The requests should be received by April 15th and September 30th.

How the requests are to be presented:

- a) Each request is to be accompanied by a full description of the project and its budget.
 - b) It should also be accompanied by information about the economic circumstances of the entity which is presenting the request.
 - c) All requests should be sent to the Secretary for Solidarity and Mission who will present the requests with his evaluation to the Superior General with his Council for a decision.
 - d) Decisions concerning grants will be made at the first General Council meeting occurring after the 15th April and the 30th September each year.
9. **The sending of Grants.** The General Secretary will inform the General Econome and the Secretary for Solidarity and Mission of the decisions taken by the Superior General and his Council, so that the General Econome may proceed with the disbursement of grants approved by the General and his Council.
10. **After a grant has been awarded,** regular reports on the progress of the project and a detailed account of the use of the money for that project must be sent to the General Secretary for Solidarity and Mission.

APPENDIX #2

MAXIMUM AMOUNT FOR ALIENATION

Obligation to apply for permission.

NATION	From Holy See		From SUP. GENER.
ANGOLA	100.000,00	USD	60.000,00
ARGENTINA	300.000,00	USD	180.000,00
AUSTRALIA	5.697.674,00	AUD	3.418.604,40
BELGIUM	2.000.000,00	EUR	1.200.000,00
BOLIVIA	500.000,00	USD	300.000,00
BOTSWANA	100.000,00	USD	60.000,00
BRAZIL	2.364.000,00	BRL	1.418.400,00
BULGARIA	1.000.000,00	BGN	600.000,00
CANADA	5.188.472,00	CAD	3.113.083,20
CHILE	500.000,00	USD	300.000,00
COLOMBIA	600.000,00	USD	360.000,00
CUBA	55.000,00	USD	33.000,00
GERMANY	5.000.000,00	EUR	3.000.000,00
ECUADOR	354.000,00	USD	212.400,00
EL SALVADOR	100.000,00	USD	60.000,00
ENGLAND WALES	6.500.000,00	GBP	3.900.000,00
SPAIN	1.500.000,00	EUR	900.000,00
FRANCE	2.500.000,00	EUR	1.500.000,00
GUATEMALA	100.000,00	USD	60.000,00
HAITI	300.000,00	USD	180.000,00
HONDURAS	100.000,00	USD	60.000,00
INDIA	10.000.000,00	INR	6.000.000,00
INDONESIA	100.000,00	USD	60.000,00
IRELAND	3.496.040,00	EUR	2.097.624,00
ULSTER/N.IRELAND	1.000.000,00	GBP	600.000,00
ITALY	1.000.000,00	EUR	600.000,00
JAMAICA	500.000,00	USD	300.000,00
JAPAN	120.000.000,00	JPY	72.000.000,00
KENYA	100.000,00	USD	60.000,00
MEXICO	500.000,00	USD	300.000,00
MOZAMBIQUE	700.000,00	USD	420.000,00
NEDERLANDS	2.500.000,00	EUR	1.500.000,00
NEW ZEALAND	4.000.000,00	NZD	2.400.000,00



NATION	From Holy See		From SUP. GENER.
NIGERIA	100.000,00	USD	60.000,00
AUSTRIA	3.000.000,00	EUR	1.800.000,00
PANAMA	250.000,00	USD	150.000,00
PAPUA N. GUINEA	1.000.000,00	USD	600.000,00
PERU	300.000,00	USD	180.000,00
PARAGUAY	350.000,00	USD	210.000,00
PHILIPPINES	500.000,00	USD	300.000,00
POLAND	1.700.000,00	EUR	1.020.000,00
PORTUGAL	1.500.000,00	EUR	900.000,00
PUERTO RICO	250.000,00	USD	150.000,00
REP. DEM. CONGO	250.000,00	USD	150.000,00
SCOTLAND	3.000.000,00	GBP	1.800.000,00
SOUTH AFRICA	6.000.000,00	ZAR	3.600.000,00
SOUTH KOREA	4.654.000,00	USD	2.792.400,00
SWEDEN	4.000.000,00	USD	2.400.000,00
CECH REP.	40.000.000,00	CZK	24.000.000,00
DOMINICAN REP.	250.000,00	USD	150.000,00
TANZANIA	1.000.000,00	USD	600.000,00
USA (+ di 500.000 cattolici)	7.500.000,00	USD	4.500.000,00
USA (- di 500.000 cattolici)	3.500.000,00	USD	2.100.000,00
UKRAINE	100.000,00	USD	60.000,00
URUGUAY	200.000,00	USD	120.000,00
VENEZUELA	3.010.000,00	VES	1.806.000,00
HOLY LAND	ALL ALIENATIONS ARE PROHIBITED		

APPENDIX #3

SUMMARY OF ACTS OF ADMINISTRATION for which it is mandatory to have the permission of the legitimate Hierarchical Superior.⁷¹

To administer property of lay people, not members of the Congregation. (19)

For a secular office involving the responsibility of accountability. (19)

To implement a loan, including on one's own property. (19)

To engage in business or commercial activity. (19)

To change provisions in the administration, use and usufruct of personal property of a religious after First Profession. (20)

To permanently renounce ownership of personal property (21)

For an expenditure that exceeds the limits established by the provincial authority (29)

To alienate precious objects, of artistic value or the fruit of donations (30)

To perform any act of extraordinary administration (47)

To rent or sell real estate, in general. (53)

To lease property to an administrator or a relative up to the fourth degree of consanguinity. (53)

To enter into a lease that exceeds 9 years (53).

To alienate property whose maximum quantity exceeds that established by the Holy See for different nations. (54)

To be able to sell property to one's own steward or family members up to the fourth degree of consanguinity. (54)

⁷¹ In parentheses the number of the reference Manual.



In addition, it is suggested that the following acts should always be considered as requiring consultation and, if appropriate, approval of the higher authority (Provincial Superior or Superior General).

1. Any matter that may affect the property status of the legal person, e.g.: grant of usufruct, gratuitous lease, easement, perpetual or long-term assignments that may result in loss of ownership or release from them, mortgages, bonds or guarantees;
2. Purchase of encumbered real estate;
3. Change in the destination or use of the property;
4. Acceptance of donations, inheritances, and bequests;
5. Renunciation of donations, inheritances, legacies, and rights in general;
6. The performance of construction, renovation, restoration and conservation, and extraordinary maintenance work, whatever their value.
7. Any act referring to movable or immovable property of artistic, historical, or cultural interest.