

DISCERNING AND SUSTAINING OBLATE MISSION

Criteria and Procedures

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Dear Provincials and Superiors,

Blessings! I am happy to present to you an instrument that I expect will be very relevant to our missionary life and was called for by the 2010 General Chapter: *“Discerning and Sustaining Oblate Mission – Criteria and Procedures.”*

The General Chapter of 2010 in its document “Conversion” committed the Central Government to “... develop a fresh animation for mission and for discerning new missionary strategies and major missionary challenges, in relationship with the local church, in dialogue with other religious, Oblate Associates and all people of good will” (see Acts of the 35th General Chapter, 2010, p. 24, ‘Our Oblate Mission’ no. 1 in English version). The ministry of the Central Government ensures “...that the Congregation remains faithful to its mission and to the demands of religious life”(C#124). Again, in C#131 the Superior General and Council have as: “Their first concern...the Oblates’ fidelity as a Congregation to the missionary thrust which is our Spirit-given heritage from the Founder.”

“Discerning and Sustaining Oblate Mission,” is an instrument to help Oblate Units and local apostolic communities in missionary animation and discernment. This resource was spearheaded by the Internal Mission Committee of the Central Government. The document was composed with the participation of all the members of the Central Government and many Oblates around the globe in an extensive consultation process undertaken by the Internal Mission Committee. The most recent OMI Constitutions and Rules and the Chapter resolutions relating to mission were incorporated in this document. I am grateful to the members of the Internal Mission Committee, Fathers Gilberto Piñón, Miguel Fritz, Emmanuel Mosoeu and Luis Ignacio Rois Alonso for their work in bringing together in an organized manner many missionary experiences, reflections and ideas to formulate this tool. I would like to thank also all the Oblates who generously collaborated in this process by their suggestions and observations, especially the significant contributions made by the previous General Administrations since 1989.

We consider this an instrument that reflects Oblate missionary wisdom and experience at the present time in which we are living. This document is a tool to help us deepen our faithful response to the “missionary thrust which is our Spirit-given heritage from the Founder” and to evaluate how we are doing mission. It is not a

finished work, but an instrument that we hope will be enhanced, made more pertinent and helpful as the members of the Congregation use it and as we continue to live the missionary vocation in this exciting and challenging time. As we prepare for the 200th anniversary of the Congregation during the Oblate Triennium it is most appropriate that this instrument is presented to the Congregation. Hopefully “Discerning and Sustaining Oblate Mission” will help us respond more fully to the Call to Conversion in our missionary lives.

May the zeal of Saint Eugene inspire us in mission. Let us ask him to intercede for us so that we leave nothing undared to extend the Reign of the Savior!

Your brother Oblate in Jesus Christ and Mary Immaculate,

Fr. Louis Lougen, O.M.I.

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DISCERNING AND SUSTAINING OBLATE MISSION

Criteria and Procedures

INTRODUCTION

1. The present Central Government has deemed it necessary to revise the criteria and policies related to establishing new Oblate missions in the light of the 2012 edition of the Constitutions and Rules and recent General Chapters, especially the 2010 Chapter, which explicitly calls the Central Government to *“develop a fresh animation for mission and for discerning new missionary strategies and major missionary challenges”*¹. This document will aid not only the General Administration but also every Oblate unit in the congregation. Its content is intended to help all those in administrative and leadership service of the congregation. The previous policies were approved by the Superior General in Council in plenary sessions between October, 1989 and May, 2003 and can be found in several General Council minutes².
2. This document also establishes the policy to both change the status and amend the statutes of a unit. Because of its nature, it could also be used to discern and evaluate the missionary presence of any Oblate community.

1 General Chapter 2010, Our Oblate Mission, # 1, p. 24-25.

3. We are guided by the very nature of our identity: *“We are a missionary Congregation”* (C 5) and *“we commit ourselves principally to evangelizing the poor”* (C 1). *“A Mission is established by the Superior General in Council in response to the call of a local Church addressing a perceived missionary need”*(C 117). *“The acceptance of a new Mission and the approval of general contracts between a province and a local ordinary pertain to the Superior General in Council”* (R 7e).
4. The establishing of a new Mission requires a process of discernment in order to make the right decisions in being faithful to our mission in the world today. This is what motivates our task of formulating the “Criteria and Procedures for Discerning and Sustaining Oblate Missions - 2014”. This is in line with other General Government and administrative documents³.

2 1st October 1989: *“Oblate Criteria for Missionary Evaluation”* (pp. 35-36). 2nd May-June 1991: *“Method for receiving and processing requests for new missions”* (p. 19). 3rd May 1998; *“Procedures concerning the request for the foundation of new mission”* (p. 13). 4th May 2002: *“Founding a new Oblate Mission”* (pp. 8-9). 5th January-February 2003: *“Procedures for Founding a New Oblate Mission”* (p. 8).

3 The Administrative Directory, the Directory of Temporal Goods, the General Norms of Formation, etc.

SECTION ONE: CRITERIA

I. Criteria to open a new Oblate Mission

A. Foundational Criteria: Foundational criteria are defined as: a set of criteria at the root and heart of our Oblate charism, criteria based on the values which moved the Founder to gather that group of men which, in time, became the Missionary Oblates. Because these criteria are so basic, they must be reflected in any evaluation of our ministries. They are the following:

1. A ministry whose aim is the evangelization of the poor and most abandoned.

By this we understand that our mission “is to proclaim Christ and His Kingdom to the most abandoned” (C 5); to hear the call of Jesus “through people’s need for salvation” (C 1); to live Christ Jesus crucified as we serve the People of God who are the privileged holders of the richness of the presence of Jesus, the Christ, for us today (C4); “to reawaken the Faith in the people by helping them discover “who Christ is” (C 7); inviting them to live Christian Charity, giving birth to Hope; to “bear witness to God’s holiness and justice announcing the liberating presence of Jesus Christ and the new world born in his Resurrection” (C 9).

2. A mission that is carried out in and through apostolic community.

In order to effectively accomplish our primary task of evangelization, Oblates witness the Kingdom of God in

and, through intercultural Oblate apostolic communities (C 3); community life is the first mission to which we are called and in which Oblates come together to pray, to share, to plan and to evaluate their ministry as well as gather mutual support and encouragement (C 3)⁴.

3. Following our Founder's advice, Oblates "spare no effort" to extend the Kingdom of God (Preface of Constitutions 2012, p. 20).

B. Constitutional Criteria: Constitutional criteria can be defined as: A set of criteria based on the values found in our Constitutions and Rules. Some of these criteria are part of our tradition from the beginning. Others have evolved over the years and have been adopted as corporate values through the acts of one or other of our General Chapters. They should be given serious consideration when we are evaluating our ministries. They are the following:

1. A mission that is in response to the unmet urgent needs of the Church.

We were founded to evangelize the most abandoned by preaching missions, taking care of the youth and sending missionaries abroad. Our Founder felt that this was the way to respond to the urgent needs he perceived in Southern France. Historically, the Congregation spread outside of Provence to all corners of the globe, responding to needs perceived as urgent. This continues in our

⁴ General Chapter 1986, "Missionaries in Today's World," Chapter 3.

tradition today: “no ministry is foreign to us, provided we never lose sight of the Congregation’s primary purpose: to evangelize the most abandoned” (R 7b).

This criterion helps us to choose that milieu where Christ is not known at all, where the Church is not established or not fully developed, where her continued existence is not guaranteed, where isolation is a factor, where re-evangelization is needed, or where there is no one else able to fill the need for pastoral leadership.

2. A mission in which Oblates as “members of the prophetic Church” (C 9) collaborate in changing all that is a cause of oppression and poverty.

“Action on behalf of justice is an integral part of evangelization” (R 9). In opting for the poor, Oblates are committed to the creation of a society based on the rights and dignity of the human person beginning with the poor and most abandoned. Such action is constitutive of the efforts we make in preaching the Gospel⁵.

3. A mission that enables the collaboration of the laity and the development of lay leadership.

The notion of collaboration in ministry is implied in our call to live in an apostolic community “growing in unity of heart and mind” (C 37). By extension, that collaboration is to be applied also to lay people, adults and youth, who share our Charism as stated in Rule 37a: “Lay people recognize that

5 General Chapter 1986, “Missionaries in Today’s World”, nos. 12, 14, 27-30.

they are called to share in the charism according to their state of life, and to live it in ways that vary according to milieu and cultures. They share in the charism in a spirit of communion and reciprocity amongst themselves and with the Oblates.”⁶

4. A mission that is in communion with bishops and in collaboration with other pastoral agents according to our charism.

We recognize that we participate in the mission of the Church. It is in this spirit that Constitution 6 calls us to fulfil this mission in communion with the pastors of the Church. Just as we seek a collaborative approach among ourselves, we also seek to exercise our ministry in this same spirit in our relationships with bishops and those participating in the “overall pastoral plan of the local Churches” (C 6).

5. A mission that is attentive to the cultural context and specific needs of the people to be served.

Our mission is to a particular people rooted in a situation specified by the many factors that impact their reality. Rule 7g calls us to proclaim the Word “adapted to and easily understood by our hearers” and Constitution 8 demands that we “be close to the people with whom we work, taking into account their values and aspirations.... to bring

6 Further emphasis is placed on this value by the General Chapter of 1986, “Missionaries in Today’s World”, chapter 4; and the General Chapter of 2010, Conversion, Letter C. “A Declaration of the 35th General Chapter to Oblates and Lay Associates”.

all people – especially the poor – to full consciousness of their dignity as human beings and as sons and daughters of God.”

6. A mission that renews itself through history, with every General Chapter adapting and interpreting our Constitutions and Rules:
 - a. On-going evaluations: R7d states that “Faithfulness to our Oblate vocation must guide us in our missionary enterprises and in accepting pastoral assignments... The same concern will also serve as a criterion in the periodic re-evaluation of our apostolic commitments.” The General Chapter of 2010 states that our conversion in the area of mission requires “That Oblates periodically submit their ministry to the discernment of their local community for evaluation and review. Evaluation of ministry and the service of mission should also happen at the province and unit level”⁷.
 - b. Self-sustainability: Prompted by the Spirit, we commit ourselves to share everything. Adopting a simple lifestyle, and “subject to the common law of labour, we contribute to the support of the community and its apostolate.” (C 21) The General Chapter of 2010 states that conversion in our stewardship of finances requires: “Effective implementation of strategies, at all levels, towards financial sustainability through an increasing

7 General Chapter 2010, Conversion, Our Oblate Mission num. 3.

reliance on local sources of revenue, especially in the growing Units”⁸.

- c. Interculturality: Oblate communities, especially houses of formation, should be “intercultural, reflecting the changing face of the Congregation”⁹.

C. Contingent Criteria: These criteria can be defined as: A set of criteria based on the concrete history and lived experience of one of our missionary units. These will need to be specified and acted upon in as much as they are pertinent to the life and experience of the unit doing an evaluation of its ministries. These criteria can be divided in two categories:

1. Criteria of circumstances.

- a. A significant historical connection with the Congregation.

At this moment in the history of a unit, a particular ministry may have a specific significance. It may happen that a particular place was started by the Oblates many years previously. That commitment may have helped define to some extent the identity of a group of Oblates or may have given the place such identity that it could not be considered as anything other than Oblate.

8 General Chapter 2010, Conversion, Financial Stewardship, num. 2.

9 Cfr. General Chapter 2010, Conversion, Our Community, num. 9.

- b.** A mission of a particular strategic value for the Church and / or the Congregation.

Because of its location or relationship to developing trends in the Church's contemporary understanding of her mission, a place or mission may be said to be of strategic value for the Church and the Congregation.

- c.** A mission has a specific missionary significance at this time.

In today's modern society, as rapid change takes place, the marginalization of individuals also increases, calling for immediate and creative approaches which the standard ecclesial structures are not yet able to give. The General Chapter of 2010 invites Oblates to "identify the face of Christ in the faces of the poor in the social context of our units today such as migrants, HIV/AIDS victims, undocumented persons, war victims, and indigenous peoples and (to) defend their rights and dignity"¹⁰. An Oblate presence in such areas can be of missionary significance both to the Church and the people it serves.

2. Criteria of convenience

Recognizing that the above Criteria are the most important, given the special circumstances in which a particular Oblate unit finds it; it is quite possible that other criteria may be applicable in choosing priorities. It may choose a particular mission because:

10 General Chapter 2010, Conversion, Our Oblate Mission, num. 4.

a. It can enable the continued missionary activity of some Oblates, e.g., elders.

b. It can serve to attract new candidates as Oblate vocations.

c. It can be a source for gathering needed funds for the works of the Oblate community.

d. It can be for the benefit of a definable group of people who are not currently served.

II. Criteria for Changing the Status of a Unit

Our Constitutions and Rules invite us to evaluate and constantly discern our life and mission to determine our faithfulness which “must guide us in our missionary enterprises and in accepting pastoral assignments (R7d). The 1998 General Chapter concluded and pledged “to review all our missionary commitments in the light of our charism”¹¹. Through these evaluations and discernments the appropriate authority at each level will be able to determine which Oblate missions no longer match up to the foundational and constitutional criteria, and also determine which Oblate Missions need to grow into a

11 General Chapter 1998, “Evangelizing the Poor at the dawn of the Third Millennium”, num. 41; Cfr. also General Chapter 2010, Conversion, Our Oblate Mission, num. 3.

Delegation and which Oblate Delegations need to grow and become a Province.

A. Foundational Criteria (Cf. above I A 1 and 2)

1. A serious analysis and discernment should be made to determine if the needs of the local Church require the presence of the Oblates with our specific charism.

Questions for Discernment:

- Is the local Church taking care of the spiritual needs of the poor?
- Is evangelization of the most abandoned the main focus (R 7b).
- What are the urgent needs of the poor¹²?
- Why should Oblate missionaries remain here?
- What makes their presence necessary in this diocese?
- Is there a special need that corresponds to the Oblate charism?
- How is the local Church organized (configuration of the number of diocesan priests, religious, pastoral agents) to attend to the spiritual necessities of the poor?

12 General Chapter 2010, Conversion, Our Oblate mission, num. 4 “...we identify the faces of Christ in the faces of the poor in the social context of our Units today such as migrants, HIV/AIDS victims, undocumented persons, war victims, and indigenous peoples and that we defend their rights and dignity.”

- What would happen to the poor if the Oblates give up this mission?
- Is the Laity in need of more pastoral training that requires the Oblates to remain there?
- Is it possible to live in apostolic community and witness to our Oblate charism?
- Will it be possible, with time, to open more Oblate communities in the area?

2. A serious analysis and discernment will determine if the local Church is well established so as to no longer require the presence of the Oblates.

Questions for discernment:

- How strong is the presence of the local diocesan clergy in this area?
- Are there other religious that can offer a more adequate answer to the needs of the diocese?
- Are there enough lay pastoral workers in this diocese?
- Is the laity in need of more pastoral training that requires the Oblates to remain?
- Why is the presence of Oblates important to the diocese?
- Do we have the resources (trained personnel, finances, other) to answer this request adequately?
- What are the financial consequences this new mission would confront?

B. Constitutional Criteria (Cfr. above I B 1-6)

Questions for discernment:

- Is there a need for first evangelization or of New Evangelization in secularized countries?
- Are there groups of persons that do not know who Christ is?
- Is there a need to rekindle Christian life?
- Is there a need to affirm cultures which are being ignored?
- Is there a need to give voice to the voiceless and promote JPIC?
- Is there a need to form lay people to develop Christian community?
- Is there a need to go where no one is going, to evangelize?
- Are there other religious more adapted to respond to these needs?
- Does the invitation come from the local or the universal Church?
- Why is the bishop asking for us?
- What is the cultural context of this invitation?
- Is the bishop open to signing a contract?
- Is it a mission that will respect Oblate identity?

C. Contingent Criteria (Cfr. above I C)

Question for discernment:

- Are there other social, cultural, political and religious issues to take into consideration?

1. Criteria of Circumstances (Cfr. above I C 1-3)

Questions for discernment:

- Is there a historical relationship to the diocese?
- Is there a personal relationship with the local ordinary?
- Do the Oblates have a sufficient number, qualified persons, and the financial capacity for the particular need of the diocese?

2. Criteria of Convenience (Cfr. above I C 2)

Questions for discernment:

- Could this mission help the congregation in fulfilling its primary mission to evangelize the poor by providing more vocations, finances or other benefits?
- Could it enable the continued missionary activity of some Oblates, e.g., elders?

3. The number of Oblates available is important but not decisive in changing the status; the criterion of mission is primary¹³. However, after some time it would be advisable

¹³ "It is important that at all levels of government of the Congregation the aim or end to which we are ordained, namely the evangelization of the poor, be primary. Consequently in all decisive instances and cases the numerical criterion alone cannot suffice for representation. This must be completed and balanced by other criteria, notably that of mission." (General Chapter of 1974, p. 26-27).

to open more Oblate communities not too far from each other.

SECTION TWO: PROCEDURES

I. Procedures for Missions

A. Founding a Mission

1. Process of Discernment

a. Request from a bishop

The initiatives for new foundations normally come from bishops who apply directly to the Superior General. In some cases, the Superior General and Council receive requests directly from the appropriate Vatican Dicastery.

If the request involves a territory where the Oblates are already present:

- i. The Superior General, through the Mission Portfolio holder, forwards the request to the Major Superior of the Oblate Unit in the territory where the Mission is to be founded, and, at the same time, informs the requesting bishop and/or Vatican Dicastery of this procedure.
- ii. It is the responsibility of that Major Superior with his Council to consider the request and make the appropriate decision. He will discern the most appropriate status for the new foundation: Residence, House or Mission. "In establishing a Mission, the missionary plan of the Region involved,

as well as that of the Congregation as a whole, must be taken into consideration” C 117.

- iii. The Major Superior will then start an “appropriate dialogue” with the bishop, taking into account: “the Central Government of the Congregation, the conference of the Region and the leadership of the unit (R 117a). The Major Superior will then inform the bishop of the decision.

If the request comes from a territory where the Oblates are not yet present

- i. The Superior General asks the Mission Portfolio holder to collect the necessary information concerning the request.
- ii. The dossier with the request is first examined by the Internal Mission Committee of the General Council, which presents its rationale and recommendations to the Superior General in Council.
- iii. If the Superior General in Council decides to reject the request, a negative reply is sent to the bishop concerned.
- iv. If the Superior General in Council receives the request favorably and is open to the new foundation, the request is forwarded for discernment to the Oblate Region where the Mission would be founded. The request is sent, with the preliminary opinion of the General Council, to the President of the Oblate Regional Conference, either by the person in charge

of the Portfolio or by the respective General Councilor.

Objective: to know the opinion of the Major Superiors of the Region about such a foundation and to identify a Province (or Delegation) that is willing to accept the responsibility of the new mission.

- v. If the Oblate Regional Conference is in favour of the foundation but fails to indicate an Oblate unit that is willing to sponsor the new foundation, the Central Government identifies a province (or group of provinces), which will be invited to take responsibility for the new Mission: to furnish the necessary personnel, assure basic financial needs, etc.
- vi. The Superior General (through the Mission Portfolio holder) contacts the provincial(s) of the identified Unit(s), inviting him (them) to consider the request for the new foundation. Before giving a final reply, a consultation of the members of the concerned unit(s) is recommended.

b. Request from Other Sources

- i. An initiative to found a new Mission also can come directly from the Holy See, going through the Superior General and his Council. The procedure of discernment for such requests will be the same as given above [I B 3].
- ii. The request also may come from an Oblate province that wishes to found a Mission and asks for suggestions from the Central Government; or from a province requesting approval of an already advanced

plan for a foundation. In this case, too, the Central Government has to be involved in the whole process of discernment. It is to be noted that these requests should be preceded by discernment at the regional level.

- iii. Request from an Oblate delegation. The request must go through the Provincial Superior and the Central Government must be involved in the discernment process.

2. Preparation

- i. Before founding a new Mission, and once a founding unit has been identified, representatives of the concerned province, and, if necessary, the General Councilor, will visit the area of the foundation to discuss and arrange with the diocesan authorities the details of the new foundation (number of Oblates assigned, ministries, accommodations, finances, time lines, etc.). Due attention must be given to the finances, so there are no misunderstandings created at the very beginning of the foundation (Can. 681).
- ii. The contract with the bishop normally should be negotiated and signed before the official inauguration of the new Mission. This agreement must address the issues noted in number **8.1** especially the financial commitments. A Mission without a formal, written and signed agreement that covers all the necessary points, including finances, can be established only with the explicit permission of the Superior General.

iii. The particular statutes (R 118a, 118b) should be worked out before sending the missionary team to the new Mission. If deemed appropriate for practical reasons, the statutes can be approved during the first period of the functioning of the Mission. It is advisable that the statutes be approved initially for a limited period of time, e.g., three years.

iv. In the case of attaching the Mission to a group of provinces (R 117c), or even a region, all the sponsoring provincials must:

- Agree on the Statutes and send them to be approved by the Superior General in Council (C 111) before commencing the new foundation.
- Clearly define the responsibility of each provincial for Oblate life, community and mission; the personnel and finances, the process of decision making at the level of the major superiors and identify the 'authority' to whom the Mission reports. The financial responsibilities must be clearly defined among the group.

v. The founding province(s), in conjunction with the Mission team, will draw up an initial five year plan for the Mission which will spell out items such as:

1. Planning with regard to the personnel of the Mission:

a. Preparatory phase:

- Identifying Oblates for the team and its leadership,

- Building the missionary team, learning languages,
- Preparatory courses, etc.,
- It is important to have some experienced missionaries on the initial team.

b. Initiation phase:

- Inculturation plan,
- Apostolic community life,
- Visits by the major superior,
- Integration within the local Church, etc.

2. Planning missionary activity:

- Missionary priorities and goals for the first five years,
- Stages of development of activities during the launch period,
- Finances:
 - ✓ An annual, and a long term, financial plan for self-sustainability with provisions for formation, healthcare and retirement.
 - ✓ Sources for the operating, financial planning and evaluation of the Mission
 - Formation:
 - ✓ On-going formation program.
 - ✓ Vocation program and how to accompany possible candidates.

vi. Joint-venture. In the circumstances where the founding province(s) would have difficulty in financially supporting a new Mission on their own:

1. The provincial(s) will identify other provinces and other Oblate financial resources which would be prepared to collaborate consistently with the Mission, and would commit themselves to finance its ordinary expenses (entirely or in part), as well as to develop a long range plan to achieve a financial base for formation, health-care and retirement. This commitment should be submitted to the Central Government for approval.
2. The relationship with the responsible unit, which provides personnel and has the primary responsibility for the Oblate Mission and the sources of auxiliary finances, is to be clearly defined in writing.
3. It pertains to the Superior General in Council to establish a new Mission and to confirm the appropriate statutes (C 117).

3. Follow up

1. Community meetings

The Superior of the Mission will assure the holding of regular community meetings of the Oblates assigned to the Mission in order to foster community life, evaluate the integration process and the development of missionary activities, execute the common plans around mission and finances and foster the development of local vocations and formation.

2. Visits

The provincial in charge of the Mission will visit it within the first year of its inauguration. The provincial treasurer of the founding province (in the case of another province having responsibility for the finances of the Mission, also the treasurer of that province) will personally evaluate the financial situation of the Mission, shortly after the first year of its existence. The visit should include a formal evaluation of the contract with the diocesan authorities, and issues of compliance with the financial provisions should be addressed. After these visits a report is to be sent to the Superior General.

Such evaluations should take place regularly in the following years, paying special attention that the required documents (mentioned **in 4.2**) have been developed by the Oblate authorities of the units involved and presented to the Superior General in Council for approval.

3. An annual written evaluation report from the Mission should be presented by the Mission superior to the provincial of the founding province(s) and to the Superior General. Before the end of the first three years a more comprehensive evaluation is to be made and the report sent to the provincial(s) and the Superior General.
4. The General Councilor for the region will make frequent visits, especially during the first years of existence of a new Mission, to ensure that the agreements which were part of founding the Mission are evaluated and updated. He will report his findings to the Central Government.
5. Thus the responsible authorities monitor the follow-up (animation and evaluation) of the new Unit and guarantee its accompaniment.

B. A Particular Case

When a unit proposes to change its statutes to establish a new Oblate presence in a new territory, without asking to establish a Mission (C 98), this change may be motivated by looking for a simpler structure due to the lack of means by the Unit or to adapt more realistically to their situation.

Discernment process

- 1.** The major superior of the unit, after consulting his council, does the preliminary work (discerning the mission, contacting the bishop, drafting a contract with the bishop, respecting the criteria in the Administrative Directory and the Directory for the Administration of Temporal Goods, consulting the membership of the unit, making specific plans for the new territory which include: missionary vision and strategy, Formation, a Financial Plan, etc.).
- 2.** The major superior of the unit writes a report to the Superior General, as well as an official request to change the statutes of the unit.
- 3.** The Central Government, as well as other relevant authorities, is to be involved from the very beginning.
- 4.** The Central Government organizes a visit to the new territory. Afterwards, those who are sent prepare a report with recommendations.

5. In dialogue with the major superior, the Superior General in Council, if he is in favor of the proposed change, approves the new statutes, approves the contract with the bishop and makes the official communication to the Congregation of this new presence.
6. A document which spells out the way this new presence will be accompanied (visit, missionary plan, financial plan, etc.) and evaluated by the major superior must be developed. Periodically a report is to be sent to the Central Government.

C. Changing the Status of a Mission

1. Description of a Mission that begins and is developing

- a. The first understanding of a Mission is: a formal structure is established by the Superior General in Council, for the first time, in a new territory, in response to the call of a local Church addressing a perceived missionary need and entrusted to an Oblate unit, or to a group of units or under the immediate authority of the Superior General (Cfr. CC 117-118 and RR 117a-117c and 118a-118b).
- b. A second understanding of a Mission is a new work or a new community established by the appropriate authority of a given unit in response to the new and urgent missionary needs identified after appropriate discernment of the unit (Mission, Delegation, Province, Region or General Government). It could

be a new missionary activity, e.g., to work with indigenous people, youth, AIDS victims, migrants, etc.¹⁴, a new community to respond to a particular need or a new Oblate presence in a new territory within the unit. In the second case the criteria below, requirements, procedures, and accompaniment procedures would be used with the appropriate adaptation. Some of these works would need the approval and accompaniment of the Superior General (RR 7d-7e).

- c. A third understanding is a new Oblate presence in a country where the Oblates are not present and are not asked to establish the juridical status of a new Mission. In this case, the Superior General and his council have to be involved in the discernment process and the final approval of this new presence, approving a good and appropriate structure (for instance amending the statutes of a province or delegation in a country outside of its territory) (C 98).

2. Requirements for an Oblate Mission:

In opening and developing a new mission, we will follow the above criteria (number 2 and 3). The following required documents are to be developed by the Oblate authorities of the unit involved and presented in due time to the Superior General in Council for approval:

14 General Chapter, 2010, Conversion, Our Oblate Mission, num. 4.

- a. The unit's statutes
- b. Its missionary vision
- c. A missionary strategy (5-10 years),
- d. A financial directory and financial plan (5-10 years),
- e. Periodic reports to the responsible unit and to the Central Government.

3. Accompaniment

- a. Frequent visits of major superior and council of the responsible unit (C 105).
These visits should give the opportunity, to dialogue about Oblate life, mission and community, to plan the budget according to the financial situation, and to evaluate the relationship and execution of the responsibilities undertaken by the responsible party(ies).
- b. Frequent communication between treasurers of the responsible unit and the Oblate Mission.
- c. The Central Government ordinarily accompanies the endeavor through the general councilor, who maintains close contact with the Oblate unit. Different kinds of visitations could be programmed (C 138).

4. Evaluation.

The Constitutions and Rules propose these different types:

- a. Of Administration: R 72a, C 74, RR 91a, 114a, 118b, 123d;
- b. Of Oblate religious life and community life: R 93b;
- c. Of Apostolic commitments: RR 7d, 38;
- d. Of Formation: R 69a;
- e. Of Finances – both the implementation by the Mission of its development toward sustainability and the adequacy of the support from the sponsoring entity(ies).

5. Procedure for a Mission to change its Status (Cfr. above C)

a. Steps to become a Delegation

After appropriate and periodic evaluation, the major superior can ask the Superior General in Council to confirm the change of status when the Mission is approaching the fulfillment of the criteria for an Oblate Delegation (C 111).

The normal procedure to be followed:

- i. Evaluation of the past five to ten years;

- ii.** Formal request to the responsible unit and to the Superior General;
 - iii.** Formal canonical visit by Central Government and responsible unit delegates;
 - iv.** Consultation of the Region;
 - v.** Updating of the Vision-Mission and Strategy documents of the unit (including all the dimensions of Oblate life: community, mission, personnel, formation, finances...), planning as much as possible the next five to ten years;
 - vi.** An assembly of the unit to update the statutes and propose changes to them;
 - vii.** Approval by the competent authorities (the major superior of the unit and the Superior General in Council);
 - viii.** Official proclamation and celebration.
- b.** Steps to close a Mission
- When the periodic evaluations give evidence that the presence of the Oblates in a particular country (place) is no longer possible or desirable, the following steps need to be taken:
- i.** Evaluation by the responsible unit and the Central Government;
 - ii.** Appropriate dialogue with the local church authority;

iii. Consultation of the Region (C 117, R117a);

iv. Agreement on a plan for closure, including a timetable which should be presented to the Superior General for approval;

v. Implementation of the plan.

c. Particular cases

Special consideration must be given to particular cases due to political, ecclesial or cultural circumstances which put the Mission in a very difficult situation for proper development.

II. PROCEDURES FOR OBLATE DELEGATIONS

A. Establishing a Delegation

Description of an Oblate Delegation

1. Nature and role

A Delegation is known as a provincial Delegation if it depends on a Province or on a group of provinces; a General Delegation, if it depends on the Central Government (CC 110, 112):

2. Structure and functioning

It is established with its own particular statutes. It may be within the territory of the province or outside it. In

either case, the confirmation of the Superior General in Council is required (C 111).

3. When a group of provinces wishes to assume responsibility for a Delegation, it pertains to the Superior General in Council, upon recommendation of the provincials concerned, to establish the Delegation with its particular statutes. One of the sponsoring provincials shall be designated as the liaison provincial with the delegation (C 111).

4. A General Delegation:

According to R 112a, a General Delegation may be established “when a Mission meets the requirements for autonomy but cannot be established as a Provincial Delegation; or when a Province no longer fulfills the necessary conditions to continue as a province but it is not judged opportune either to unite it to another Province or Delegation, to include it in a broader restructuring or to establish it as a Provincial Delegation.”

Constitution 114 advises that “Constitutions and Rules 102 to 109 relating to structures and functioning of provinces apply with appropriate modification to delegations and will be adapted to each delegation in its particular statutes.”

B. Description of a Delegation that develops holistically

A Delegation is growing:

- When community life (C 37) is well established;
- When the missionary plan is being implemented and regularly evaluated;
- When programs of on-going formation are being implemented regularly;
- When vocation and first formation plans are successful;
- When financial self-sustainability is achievable, and appropriate actions are being undertaken to implement the achievable;
- When the Oblate charism is being incarnated in this particular area;
- When the training of leadership is planned and implemented;
- When an office and archives of the unit are established.

1. Its Requirements are:

- a. Unit's statutes (R 114b);
- b. Missionary vision (R 115a);
- c. Missionary strategy (5-10 years) (C 115);
- d. Formation directory (R 114a);
- e. Financial directory (C 116);
- f. Annual reports to the responsible unit and Central Government (R 162a);

g. Consolidated financial report and copy of the budget to the General Treasurer;

h. Office and archives.

2. Accompaniment

a. Frequent visits of the Major Superior and Council of the responsible unit (C 105). These visits should give the opportunity to dialogue about: Oblate mission and community, financial planning and evaluation according to the financial situation.

b. Frequent communication between treasurers of the responsible unit and the Mission.

c. Central Government visits (C 138). The Central Government ordinarily accompanies through the General Councilor, who maintains close contact with the Oblate unit. Different kinds of visitations could be programed (C 138).

d. Evaluations: The Constitutions and Rules propose these different types:

i. Of apostolic commitments (R 7d, C 38);

ii. Of Oblate religious life and community life (R 93b);

iii. Of Formation (R 69a);

iv. Of administration (R 72a, C 74, RR 91a, 114a, 118b, 123d);

v. Of finances.

C. CHANGING THE STATUS OF A DELEGATION

Procedure for a Delegation to change its status (cfr. Above C)

1. Steps to become a Province

The normal procedure is as follows:

- a. Evaluation of the past five to ten years;
- b. Formal request from the responsible unit and to the Superior General;
- c. Formal official visit by Central Government and responsible unit delegates;
- d. Consultation of the Region;
- e. Elaboration of the Vision-Mission and Strategy documents of the unit (including all the dimensions of Oblate life, community, mission, personnel, formation, finances) planning as much as possible for the next 5 to 10 years;
- f. Assembly of the Delegation to draw up a proposal of the revised statutes, the financial directory and the formation directory;

- g. The Superior General in Council (C 98) establishes the new province, approves the statutes and appoints the provincial administration;
- h. Official proclamation, installation and celebration.

2. Steps to return to its previous status of an Oblate Mission

When the periodical evaluations give evidence (cfr. **num. 10**) that for the Oblate delegation in a particular place, it is no longer possible to grow or it must return to its previous status as an Oblate Mission, these steps need to be taken:

- a. Evaluation by the responsible unit and the Central Government;
- b. Appropriate dialogue with all the members of the unit;
- c. Consultation of the Region (C 117, R 117a);
- d. Informing the local Church authorities;
- e. Agreement on a plan to become or close an Oblate Mission, describing the timetable;
- f. Implementation of the plan.

3. Particular cases

Special consideration must be given to particular cases due to political, ecclesial or cultural circumstances which put the unit in a situation which makes it very difficult proper development.

III PROCEDURE FOR RESTRUCTURING WITH OTHER UNITS (CC 97-98; RR 97a, 98a-98d)

A. Rationale:

The structures in our congregation are established to serve and improve Oblate life and mission. After appropriate discernment, two or more units could begin a process of restructuring in dialogue with the Central Government. The primary goal of such a process must be the good of the Oblate mission and community, including appropriate provision for retirement, healthcare and finances. There are different causes and motivations to begin this process:

- Two or more units discover that for the good of the Oblate mission and community in their respective territories they have to increase collaboration, changing the structures;
- One or all of the units involved in such a process do not have the requirements of the Constitutions and Rules to keep their status;
- One or all the units involved desire to grow in interculturality as a prophetic sign of the Oblate family and mission;
- After discernment, a region engages all the units in a restructuring process to answer the missionary challenges identified;
- The Superior General invites some units to start a process of restructuring.

During the process of restructuring, fundamental dimensions have to be taken into consideration: spiritual, psychological and juridical aspects (Cfr. *Ecclesiae Sanctae* II, art.39). The plan of restructuring must spell out clearly how it will deal with these aspects among all the Oblates involved in the process.

The criteria below, requirements, process and accompaniment will guide the restructuring and will need appropriate adaptation and contextualizing:

B. Agents of the process:

All Oblates are responsible for the life and mission of the congregation. Therefore, all the Oblates belonging to the units involved have to be engaged, appropriately and respectfully, in any restructuring process. The units' administrations (superiors, councils and treasurers) have an important role to play in such a process, as do the local superiors and treasurers; the regional level has to be involved for consultation and coordination. The Central Government has to be involved during the discernment process and must also take the necessary decisions at the level of governance. During the whole process the general councilor has a very important role as liaison person between the Units concerned and the Central Government. He is to be involved in the entire process and could be called for assistance at any time.

C. Different Scenarios:

In this section, we try to identify the key actions and the key actors to begin and develop a process of restructuring (R 98d).

1. Units take the initiative

a. Two or more units take the initiative.

After discernment and evaluation of their respective mission vision and strategy documents, their personnel situation (especially capability for leadership and finances), and their planning for the coming years, two or more units decide to be engaged in a process of restructuring.

Steps to follow:

- i.** The administrations involved take the decision to start the process;
- ii.** At the proper time a consultation of all the Oblates belonging to the units involved is necessary;
- iii.** Permission from the Superior General is required to proceed further;
- iv.** A commission should be established to build up and accompany the process. This commission presents to the administrations a calendar with actions and proposals: among the proposals, describe how to involve the membership in the spiritual, psychological and juridical process

(community, unit and inter-unit meetings, retreats, celebrations of the history and other...);

- v. Lay and Oblate experts have to be consulted as to how to deal with the missionary, cultural, spiritual, emotional, community, financial and legal aspects;
- vi. The commission draws up a plan as to how to involve the active collaboration of the Central Government and the Unit administrations in the process;
- vii. The established commission follows up the process, being flexible enough to overcome problems as they unfold and to study any legal aspects;
- viii. This commission prepares draft documents of statutes, missionary vision and strategy and Formation and Finance directories for the new Unit;
- ix. Assemblies in each unit study the proposals;
- x. A general assembly, with representation from each unit, approves the statutes and missionary documents to be presented for approval to the Superior General;
- xi. The Superior General in Council (C 98) establishes the new unit, approves the statutes and missionary documents (vision and strategy) for three years ad experimentum and appoints the

first administration of the new unit. He decides how this unit will be accompanied and evaluated during the first three years (for instance, how and when they have to produce their directories and how to evaluate before the end of the three years).

- b. One or all of the units involved desire to grow in interculturality for the good of the mission. A call of the last General Chapter is to grow in interculturality and the restructuring process could help to answer this call.¹⁵ The process has to follow the steps described in C 1 above.

2. After discernment at the regional level some units (or all the units) decide to be engaged in a restructuring process

The process starts when a Region decides to have an evaluation of the missionary vision and strategy of all the units in order to have a common missionary vision and strategy. After this evaluation some (or all) of the units could decide to start a process to better answer the challenges. In the discernment process of the Region, the Central Government has to be involved. Then they will follow the process described in III C 1.

3. The Superior General invites some units to start the process of restructuring.

The Superior General's responsibility and authority is well described in Constitutions 133-138. Because of his

¹⁵ General Chapter 2010, Conversion: Community num. 9; Mission 5-7; Formation 1.6.

important role for the good of the life and mission of the congregation, after evaluating the situation of a unit and after consultation with his council, he could take the decision of inviting some units to be engaged in a process of restructuring. This could be motivated by different reasons:

- a. The new unit should take responsibility in an area (geographical or missionary) of the congregation;
- b. For declining units, e.g., aging and lack of new vocations, it could be better to be part of a large unit planning the future;
- c. For the good of sharing resources and personnel;
- d. When a unit is not matching the criteria of the Constitutions and Rules to keep their actual status (RR 97a; 98b) as a province or Delegation;
- e. Other reasons that would determine if a special intervention is needed are described below in number 10 of this document. Once the Superior General in Council takes the formal decision, the process to follow is like described in III C 1.

4. Accompaniment and Follow-up

A process of accompaniment of the unit, which includes periodic evaluation and implementation of the documents and directories of the new unit, has to be by common agreement among the new unit administration and the Central Government. This agreement has to contain at least the following elements:

- a.** Frequent visits of the new major superior and Central Government (C 105).
These visits should give the opportunity to dialogue about: Oblate mission and community, financial planning, and evaluation.
- b.** Frequent communication between major superiors, treasurers of the new unit and the Central Government. Periodic reports (annual, consolidated financial reports and others) to the Central Government.
- c.** Central Government accompanies ordinarily through the General Councilor who maintains close contact with the Oblate unit. Different kinds of visitations could be programmed (C 138).
- d.** Evaluation. The Central Government and the Oblate leadership of the new unit will adopt periodical evaluation. A detailed evaluation is required before the end of the three years from the approval of the new statutes. The Constitutions and Rules propose different types of evaluations:
 - i.** Of administration (R 72a, 74, 91a, 114a, 118b, 123d);
 - ii.** Of Oblate life (R 93b);
 - iii.** Of apostolic commitments (R 7d, 38):
 - iv.** Of formation (R 69a);

v. Of finances;

vi. Of all the directories required (temporal and/or material goods, formation, administration) which have been approved and are being implemented.

SECTION THREE: CRISIS INTERVENTION IN A UNIT

The Constitutions and Rules explain the nature and role of a province (CC 96-109), a delegation (CC 110-116) and a mission (CC 117-118). In this document the Central Government has described its understanding of each one of these units as well as the criteria to follow to evaluate and plan their life and mission. At this moment, we want to respond to the 35th General Chapter calls¹⁶ asking decisions in crisis situations be taken in an appropriate way.

I. Criteria to be observed

A. The General Chapter and our Constitutions and Rules call us to look at and evaluate carefully how and when to take a decision regarding a formal intervention. Any such interventions would have to be contextualized according the particular status of the unit (mission, delegation, or province). There are six main criteria to consider:

1. Appropriate missionary vision and strategy;

¹⁶ See *Leadership num. 1 and financial stewardship num.6.*

2. Appropriate community living;
3. Appropriate self-sustainability plan on finances; including financial planning and evaluation;
4. Appropriate formation plan (first and ongoing);
5. Appropriate personnel to match priorities;
6. Appropriate leadership;
7. Other criteria have been stated in the Constitutions and Rules, for instance, the capacity to communicate in a common language and respect for cultural diversity. Another criterion is that a unit has to demonstrate its possibility to continue into the foreseeable future.

II. Procedures to be followed

Each unit has to be accountable for its life and mission. It is a practice in our congregation to be accountable also to the Central Government, ordinarily through annual reports, visits, and other means. Evaluation is an ongoing process for each Unit and community. Sometimes the question arises whether to intervene, when and how.

A. When:

If one unit is not able to fulfill two or more of the main criteria for five years or more, and they cannot demonstrate they will fulfill them for the next five years, the Superior General (or the major superior in charge)

intervenes in order to look for an appropriate solution. The minimum to fulfill the criteria is as follows:

1. Missionary vision and strategy

- To have a missionary vision and strategy plan, updated with each new administration.
- To have an on-going evaluation of their ministries at all the levels (local community and unit).

2. Community Life (C 91-95)

- The unit has a policy of living in community according to the Constitutions and Rules.
- Two thirds of the Oblates are living in communities composed of a minimum of 3 members where they share life, mission and finances.
- The permission for Oblates to live alone is given only in exceptional cases, for the sake of the mission and on a temporary basis (R 92c).

3. Self-sustainability plan on finances

- a. When evaluating the self-sustainability of a unit there are 3 stages that must be taken into account:
 - i. Stage 1- the local income covers all the administrative expenses;
 - ii. State 2- the local income covers all the administrative and formation expenses;
 - iii. Stage 3- the local income covers administrative/formation expenses and allows the unit to contribute to the Congregation.

We also need to evaluate the financial situation of a unit, taking into account the following elements:

- iv.** Does the local income guarantee half of the expenses in the annual report?
- v.** Does the unit have an annual financial planning, evaluation and financial report that allows for an evaluation whether the financial planning and evaluation was realistic and adhered to, and does it use that in developing future financial plans and evaluations?
- vi.** Does the unit have a realistic and implementable long-term plan towards self-sustainability?
- vii.** Does the unit report annually to the provincial and Central Government?
- viii.** Does the unit train personnel for financial leadership?

4. Formation

- To have a program for vocations;
- To have a program of first formation which might collaboratively use the formation programs of another Unit;
- To have a program for on-going formation.

5. Personnel

- If a province is not able to reach a minimum of 60 members within a foreseeable future;

- To guarantee the minimum of active personnel to fulfill the commitments of the unit¹⁷.

6. Leadership

- To be guided by (C 28, 82)¹⁸;
- The major superiors and their treasurers are committed primarily to their service (RR 88b, 102a);
- To have sessions with local superiors;
- To have a plan for training in administration;
- Offices and archives, and communication with the Central Government.

B. How:

1. Evaluation

When there is serious concern on the viability of a unit, the Superior General takes the initiative to ask for a comprehensive evaluation of its life and mission, asking for the annual reports of the last five years, including the consolidated report, and preparing a special

17 “It is important that at all levels of government of the Congregation the aim or end to which we are ordained, namely the evangelization of the poor, be primary. Consequently in all decisive instances and cases the numerical criterion alone cannot suffice for representation. This must be completed and balanced by other criteria, notably that of mission.” (Acts of the General Chapter of 1974, p. 26-27).

18 Cfr. General Chapter 2010, Conversion, Service of Leadership and Authority.

visitation. The Superior General decides on the composition of the team for the visitation, whose membership will be formed by two members of the Central Government and two other Oblates from the region, selected for their expertise. The team makes a report on the visit with recommendations.

2. Discernment

After having studied the reports and consulted the unit administration and its membership, the Superior General in Council decides on the actions to be taken to address the situations that require intervention. It could be good to establish a committee to follow up, to ensure the implementation of the recommendations and decisions, and to provide ongoing mentoring.

III. Accompaniment

A. The general councilor or another Oblate is appointed to follow up and accompany the unit. He will be accountable to the Superior General. Together with his a team (from the unit or elsewhere), he will present to the Superior General the method, calendar, and proposals for evaluating, reporting and implementing actions. The Superior General in Council approves the plan of special intervention.

B. Possible Actions

According to the nature of the crisis, the Superior General can decide on his own authority (C.135). Among other possible actions, he could:

- Change the status of a unit;

- Invite a unit to start a process of restructuring;
- Appoint administrators or leaders with specific power and authority;
- Suppress a unit, giving an obedience to the Oblates to other units.

A Final Word

The same Spirit that moved Jesus to preach the Good News to the poor inspired our Founder, Saint Eugene, to leave everything, even family and friends, to follow Jesus in the footsteps of the Apostles. In the same way, the Holy Spirit has inspired many Oblates during the last 200 years to live and evangelize under the guidance and light of the Oblate charism. The Spirit moves the Central Government to be faithful to the Oblate charism by following these criteria in discerning new missions in the Oblate Congregation.

Approved by the Superior General in Council on May 22nd,
2014

