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“The changing landscape in religious missionary life”

*REFLECTIONS AND QUESTIONS REGARDING FINANCE AND ECONOMIC
MANAGEMENT IN TIMES OF RECESSION*

The Challenges and difficulties confronting us

Let us take the theoretical framework of the transformative experience as the guide for our reflection, starting with the following four areas of experience: the context, the people, the organization and the area of faith. These four topics will serve to focus our enquiry.

1. A look at the global context as set out in the VUCA and BANI¹ hypotheses

Over time different models have been developed, in a theoretical framework, which can help us to understand the present global context better. People try to put reality into words to explain/simplify it, help us to understand it, and obtain information from the environment.

In these times of turbulence, the VUCA and BANI concepts have been developed that have something in common. Both paradigms are simplified representations of reality whose aim is to provide a better understanding of the context in which we live, namely, our environment.

Until recently, to analyse the current situation of the members and the organization of the congregations/institutes, we used the VUCA model of the environment. The initials stand for:

- **V** for Volatile (*volatile*): understood as a changing, unpredictable environment, in which events occur at enormous speed.
- **U** for Uncertain (*uncertain*): understood as the impossibility to predict the changes that are about to take place even with a high level of information: inevitable consequence of constant change.
- **C** for Complex (*complex*): the confusion caused by change. We are unable to control what happens and this makes us feel incompetent. We have to manage complexity in an atmosphere of uncertainty.
- **A** for Ambiguous (*ambiguous*): understood as a lack of clarity. The inability to foresee the future results in very many disparate hypotheses.

Many scholars have begun to regard the *VUCA* example to be obsolete, *inadequate*, and feel the need to replace it, *incorporate* additional elements to complete the conceptual model we use to estimate reality.

Today we have started to talk about **BANI**. Due to the chaos the *pandemic* generated in the world, in 2020, a new concept has been gaining strength. At a time when the global situation is changing, new tools or concepts are required to help us make sense of reality. We need examples that simplify the context and enable us to identify appropriate responses in an unpredictable world.

As in the case of VUCA, to understand the concept, the letters that form the acronym have to be read (in English) as: (**B** for fragile, **A** for anxiety, **N** for non-linear and **I** for incomprehensible).

- **B for Fragile or brittle (*brittle*)** — is a consequence of the gaps the volatility of the previous situation caused. The context has become increasingly brittle and, therefore, fragile, since it can breakdown at any moment. That is, the forms of social and economic organization have been *marked* by different world events and are, today, weaker than they appear. If we look closer we see that such systems can break down at any time, even those that seem the strongest. The **B** for **BANI** is also linked to the concept of an inflexible environment. Our outlook is rigid, systems are more static than they should be and therefore our readiness to adapt, our resilience, is reduced.

- **A for Anxiety (*anxious*)** — Furthermore, this volatile and unpredictable context shows symptoms of fragility in the face of any event that disturbs the civil organization. This atmosphere of restlessness arouses anxiety which increases the feeling of helplessness experienced by individuals or institutions unable to find an alternative, renovating, solution that considers the environment to be a truly valid value. Any solution we may suggest will be seen as incorrect, since we live from day to day with apprehension. This **A** for *anxiety* is the result of our attempt to bring the future closer to the present, choosing very quick solutions to problems, trying to *run too fast*. This has made us feel insecure, increasingly uncertain. The danger is not the anxiety in itself, but the fear it generates and the danger that this feeling of helplessness might turn into passivity.

- **N for non-linear (*non-linear*)** — We are used to living in a complex world (the **C** in VUCA). Although it is increasingly clear that the cause-effect relationship, although it may be consequential, is certainly not immediate and that upsets us. It gives us a feeling of incompetence because we cannot immediately relate the result to the cause. A non-linear environment produces imbalance. This delay between the origin and the consequence destabilizes us. If the effect is not linked to the cause, the consequences surprise us and seem out of proportion. This produces a sense of urgency, contributing further to the feeling of anxiety.

- **I for incomprehensible (*incomprehensible*)** — VUCA was an ambiguous example, and that ambiguity of the environment is what makes it incomprehensible, illogical, and we cannot understand what is happening. Since it no longer follows a familiar pattern this makes us feel that we do not have the ability to understand it. Even the additional information available seems insufficient for us to grasp the full magnitude of all that's going on.

We are all affected by this change in the current situation. It is essential to understand the context in order to interpret reality and what is happening to us. The smaller the group, the more difficulty it has in adapting to the changing reality quickly; but this is not a characteristic of religious congregations. However it is hard to foresee and anticipate events, plan, visualize a future fraught with uncertainty, which seems increasingly incomprehensible to all of us. We sometimes have the feeling that nothing is as we had imagined just a few years ago.

The last few years have been marked by the COVID pandemic which has changed our way of looking at reality. The war in Ukraine in this part of the world has come to destabilize the Euro economy. This has once again created a cold war environment that is difficult to understand and that has very serious economic consequences (loss in investments, high inflation...).

In general, we can say that it is necessary to plan **short-term strategies**. Long-term strategies no longer make sense since the situation prevents us from guaranteeing decisions with full information, with a proper evaluation of the data. In religious life it takes us a long time to obtain all the information necessary to reach a decision and when we make it, the global situation may render it invalid. (Example: change from long-term to short-term investments, rapidly changing and attractive short-term interest rates...).

Let us ask: how does this change in model affect our changing landscape in religious missionary life? Do we take the global context into account when making mission decisions?

2. A look at human resources: PEOPLE

We have to deal with the **DECREASE IN THE NUMBER of members**.... We no longer have the vocations we had; the annual number of deceased is generally higher than the number of new candidates in most congregations. Besides, there are frail **ELDERLY MEMBERS** especially in some countries, whose average age is very high and their care needs costly.

The average age of many of our congregations in this hemisphere is between 80-85 years while in many “mission” countries it is 30-35 years.... In addition there is an **IMBALANCE between the different contexts**. In the geographical areas of Europe, America, Oceania, there are elderly members, but no vocations for many years. Nevertheless this is where most of a congregation’s material resources go, which are difficult to manage at times. The areas of Africa and Asia, increasing in terms of the number of members, present very real current and future economic difficulties, as well as political and economic instability in some countries, even in a situation of conflict.

In general, this imbalance is caused by **THE LACK OF VOCATIONS** in certain areas of the world and by the acceptance of new vocations in some countries, as though this could solve the future of the congregation. But let us ask, **how are we going to manage this emerging reality at the economic level in the future?**

Another factor to take into account in the future, in addition to the reduced number, concerns formation: **THE TRAINING RECEIVED OR THE LACK OF TRAINING IN EVERYTHING RELATED TO THE ECONOMY, FINANCE AND MANAGEMENT** of an institution. In general, and even more so in women's congregations, we have devoted little or not enough means to the formation of members: we are few, we do not have enough resources ... and now this lack of formation, when situations are increasingly complex, makes us feel insecure and unable to face the great challenges before us.

3. A look at the ORGANISATION, at the group —

LEADERSHIP at all levels is lacking in many Congregations and Institutes. Often the members have good will but little or no leadership skills and at times even age limits. They have little **ability to turn a situation to account quickly and effectively**. They use their skills to make the best decisions possible, but always related to security, to familiar paths that often lack creativity.

Many members, who were born in situations of extreme need, have a good understanding of poverty, austerity, financial difficulty, but few management skills.... When we talk about these issues it is commonly said that we are not a *company*; but in reality we manage real estate assets, have investments, works and work-related centres with staff, that are more like a multinational organization than a congregation, whose purpose is evangelization, that trusts in Providence.

MATERIAL RESOURCES, let's talk about them —

INCOME: Salaries and pensions. Most of the income congregations receive, depending on the geographical area, regards retirement pensions. Wages have been reduced, while in our own works or those of others, most of us are over the working age. And in areas where people are younger, jobs are scarce or unpaid. This generates another strong imbalance: the internal financial viability of an organization/group....

EXPENSES: the aging of members and the cost of caring for this age group. Various companies have now taken over many of the tasks we carried out for years. In addition, funds for **training:** especially, the need to allot resources to train members in places with no income, to enable them to meet this expense: betting on the future is betting on sound training.

PROPERTY: USE AND VALUE. Here, we come to a dilemma, we own properties in some parts of the world with a high market value as well as high maintenance costs, taxes, but some are half empty, although they have high potential when well managed.

Some properties could be divided: to house communities, other properties could be used for works, the mission apostolate, while a third group of buildings is sometimes left empty. Good estate management involves letting these properties to generate funds to help balance/maintain a congregation's financial stability. Nonetheless, we need new buildings in some mission areas that are expanding, although their upkeep may be difficult to maintain.

FUNDS AND RESERVES FOR THE FUTURE AND THE ABILITY TO MANAGE THEM

Here we observe another weakness; the lack of sufficient funds or the difficulty to manage these in the best way. Some of our works always run at a loss/deficit, besides which there are: rising costs, community expenses, training expenses, expenses for the care of the elderly....

And here, as in leadership, the lack of training in accountancy/the administration of assets is a major drawback in many congregations. We often make do or hand the management over to outside agents without having established adequate surveillance mechanisms on our part.

4. A look from FAITH

We are called to look at reality with the eyes of God, as well as at our congregational, missionary religious life reality in order to find practical answers in the midst of this changing, and sometimes incomprehensible, situation.

APOSTLESHIP AND MISSIONARY EXPANSION: mission is the core and *raison d'être* of our congregations. Sometimes we have closed works in places where we had worked for 100 or 150 years, at other times we stayed, but as we resisted change the mission shrank and slowly petered out. At times we take risks and cooperate in joint projects far beyond our capacity....

But when we talk about finance and mission, the challenge is: how can the mission be sustained, how can we allocate funds for projects to guarantee the mission over the next 10, 20 or 50 years? And my question is: **When we talk about sustainability, do we think about ourselves, the members or the projects? How can one combine these aspects?**

Sometimes POSSIBLE ANSWERS do not seem to spring from our faith but from the absence of it. Our perception of the future, based on the current situation, offers several options, each of which must be treated in a different way according to the aim and financial situation of a congregation.

Keep on hoping: better times will come, vocations from other continents, committed lay people.... Making small superficial changes we go on as before, merely adjusting the profile of our administration. But in the meantime life and hope die out.

□ **Seek alliances; actively search for solutions:** we are few, but if we unite we could be stronger, seek alliances, union, merge with similar charismas to carry out common projects. Sometimes we coordinate our weakness, which may work for a while.

□ **Seek transformation,** make a definite change that starts from each one of us. This renovation needs to be adopted and implemented in the organisation and structures we manage.

□ **And** — in some cases choose to live in the key of *resurrection*, that is to say, live from the perspective of the **MISSION ACCOMPLISHED**.

SHARED VULNERABILITY...

The changing landscape in religious missionary life, which is helping us to feel small, fragile and vulnerable, could be an opening for change. We must face the situation squarely and ask:

What does God want of us, of our small or large congregation, today?

It is not easy to know what God wants, but sometimes it is easier to list what we think he does not seem to want; he does not want us to carry on perpetuating the former framework, nor does he want us to return to the familiar, but obsolete, form of religious life ... *it was always done like this...* He does not want to see us exhausted, in search of unproductive solutions.

He wants us to have an open spirit of discernment, seeking the best answers; sharing our vulnerability, taking risks and searching together through dialogue and communion.

And above all, I think that he wants our finances, management, overall assets, to be put at the service of a circular economic system, an economy of gift, of communion.

Food for thought:

- When I think about the **FUTURE OF THE MISSION AND THE CHANGING PANORAMA OF RELIGIOUS LIFE**, what do I feel? What is my immediate reaction?
- What do we need to let go of, dispense with ... so that we can accept the fragility, vulnerability we are experiencing in religious life at this time as a gift for mission?
- Do we perceive that something is emerging, germinating, appearing in these times, as a sign of the Spirit for a new organization-administration model for the mission within each Congregation? What would this new model be like and what characteristics would we assign to it?

FOOTNOTE

1. Aitana González, Expert in digital strategies and transformation, Openwebinars