



**NEW MODELS
OF ANIMATION, GOVERNANCE
AND MANAGEMENT**

DIAGNOSIS

Rome, april 2015





The process we have accomplished

The 21st General Chapter's call to "go with Mary in haste to a new land" has triggered many life-giving processes in different regions of the Institute, making us perceive the heart of the Marist charism, its vitality, internationality and multiculturalism, and the reality of children, adolescents and young people in the five continents. All this is a new wine for us. What wineskins will we use to contain it?

In February 2014, Brother Emili and the General Council launched the New Models of Animation, Governance and Management Project (New AGM Models), asking the Institute to participate in a diagnosis process, and to envision and illuminate a new century for the Marist charism. They entrusted this endeavor to an International Commission, the Secretariat of Mission, a Team Project, and an

external consultant (AT Kerney).

The Project's basic goal is to ensure the development and sustainability of Marist life and mission by proposing and implementing principles, guidelines and possible models of AGM for the General Administration and the Administrative Units (AUs).

WHO ARE THE PARTICIPANTS?

This year's work included six regional meetings throughout the Marist Institute. We visited 14 AUs and a number of Marist works and communities. During these meetings and visits, we contacted 288 people (70% brothers and 30% laity). All the Provincials and District Superiors participated.

	REGION	DATES	PLACE
1	Arco Norte	April 5-8	<i>Quinta Soledad.</i> Mexico City
2	Brazil and Cono Sur	April 28 to May 1	<i>Marist Spirituality Center.</i> Santiago de Chile
3	Africa	July 23-25	<i>Roussel House.</i> Nairobi
4	Oceania	August 22-24	<i>The Hermitage.</i> Mittagong
5	Europe	October 15-17	<i>General House.</i> Rome
6	Asia	October 27-29	<i>Camillian House.</i> Bangkok



ARCO NORTE REGIONAL MEETING



ASIA REGIONAL MEETING



BRAZIL AND CONO SUR REGIONAL MEETING



EUROPE REGIONAL MEETING



OCEANIA REGIONAL MEETING



AFRICA REGIONAL MEETING

VISITS TO THE AUS (2014)

DATE	PROVINCE OR DISTRICT
April 3	• USA Province
April 4-9	• Central Mexico Province
April 10-12	• Western Mexico Province
April 25	• UMBRASIL • Brasil Centro Norte Province
May 2	• Province of Santa María de los Andes
May 11-22	• South Asia Province
July 22	• East Africa Province and MIUC
August 21	• Province of Australia
October 7	• Marist Spanish Conference
October 7	• Province of Ibérica
October 8-9	• Province of the Hermitage
October 13	• West Central Europe Province
October 30	• District of Asia
November 24	• Oceania Mission Council
November 25	• Pacific District • Province of Canada

WE HAVE SHARED WITH OTHER INSTITUTIONS

- De La Salle Brothers
- Jesuits
- Salesians
- Opus Dei
- Other branches of the Marist Family

REGARDING TOPICS SUCH AS

- Animation (a selection of topics)
- Government Models
- Management models
- Relevant practices
- Laity





Diagnosis of the current situation

Below is an overview of the present situation.

As already mentioned, the first phase of the project ended with the presentation and display of all the information collected during the diagnosis process. The presentation includes the three main areas of animation, governance and management.

We will describe three aspects of each area:

- a.** Current situation.
- b.** Areas to be improved.
- c.** Lessons we have learned somewhere in the Institute.



Animation

Animation includes the facts, processes and results concerning the generation of life, interest, motivation, movement and action. It embraces all the activities aimed at promoting Marist life and mission.

To assess the area of animation, we have analyzed a number of key aspects: evangelization, education, solidarity, rights of children, spirituality, and other relevant aspects that emerged during the diagnosis process.

EVANGELIZATION

DESCRIPTION

- Evangelization is most evident in schools. It is still a great challenge in social centers, universities and other non-formal education programs.
- There are different ways of understanding evangelization within the Institute (e.g., between Europe and Asia).
- Marist Youth Ministry is quite strong and well organized in some Regions of the Institute.

AREAS TO BE IMPROVED

- The evangelization processes would need greater involvement from the part of Marist brothers and laity. The selection, training and accompaniment of educators is important.
- In some Regions, a better organization and development of Vocations and Marist Youth Ministries is necessary.
- It is necessary to consider our participation in contexts of vulnerability where our presence is more urgent and crucial.

LEARNED LESSONS

- We could take advantage of existing educational programs, which follow common criteria and indicators of evangelization (assessment centers).
- There are charismatic leaders, and we are allocating resources and efforts to promote evangelization projects.
- There are interesting and innovative evangelization projects in different parts of the Institute (e.g., projects regarding the education for inner life and MYM).

EDUCATION

DESCRIPTION

- Schools are the highest expression of the Marist mission. Marist institutions of higher education, and Marist publishers are developing network projects.
- The Marist educational works are clearly appreciated in many countries and enjoy high prestige.
- Some Regions are taking steps regarding leadership training.

AREAS TO BE IMPROVED

- There could be much more sharing of resources, knowledge and innovation.

LEARNED LESSONS

- There are some experiences of regional coordination of Marist pedagogy.
 - We have opportunities to strengthen research and innovation (innovative didactic methodologies, frontier schools, etc.) and take advantage of the new technologies applied to the educational process.
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SOLIDARITY

DESCRIPTION

- There is a consolidation of solidarity as a basic pillar of the Marist mission, an increase in the number of social centers and programs, and collaboration with governmental and non-governmental organizations.

AREAS TO BE IMPROVED

- We can improve the formation for justice, fraternity, solidarity and the promotion of volunteer programs.
- We have not defined “economy and operation models”, a fact that is compromising the social projects of many AUs.

LEARNED LESSONS

- Solidarity is widely acknowledged as an emerging value, and the people involved are passionate about their work.
 - Projects and centers that are cooperating with other organizations are much more viable and have many advantages for the participants.
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CHILDREN'S RIGHTS

DESCRIPTION

- There is an increase in internal and external awareness regarding the Institute's contribution to the defense of the rights of children. Many people are involved in the defense of these rights at all levels and in different countries.

AREAS TO BE IMPROVED

- We should include the rights of children in the education and evangelization projects.
- We must move from a model of protection to a model focused of prevention, promotion and participation.
- We need greater professionalization, and to provide adequate training to all educators and leaders of the mission (brothers and lay people).

LEARNED LESSONS

- There are experiences of collaboration with other organizations to promote and protect the rights of children.
- The AUs' contribution to a participative promotion of children's rights and to the prevention of violations is being a key factor regarding the external recognition of the Institute's commitment to protecting the rights of children.

SPIRITUALITY

DESCRIPTION

- We perceived a constant interest in people's personal development within the Institute.
- There is a wide range of spirituality programs for brothers and lay people at the local and regional levels.

AREAS TO BE IMPROVED

- It is important to provide opportunities for personal growth (interiority, spirituality, etc.), and to offer structured and systematic accompaniment.
- We could support the development of spiritual leadership.

LEARNED LESSONS

- The institutional documents clearly define Marist spirituality. People accept it well.
 - There are processes of joint formation for brothers and lay people at the local and regional levels.
 - There are opportunities to take advantage of the mission in order to develop people's interiority and spirituality (new frontiers, missionary works).
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OTHER RELEVANT ASPECTS

DESCRIPTION

- There are people and organizations that facilitate communication in many parts of the Institute.
- There is also a local and regional organization of the laity.
- There are many shared programs and projects of international communities for the mission.
- The numerical decline and ageing of the brothers is evident.

AREAS TO BE IMPROVED

- There is a need to consolidate the regional organization and structures regarding animation.
- More brothers could be actually present among children and young people.

LEARNED LESSONS

- There are Marist communities of reference, and some mixed communities of brothers and lay people. International missionary collaboration (CMI) is developing.
 - There are significant formation experiences for brothers and lay people.
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Governance

Governance is the particular way of animating, leading and managing the Institute with a view to its vitality and sustainability. It regards the definition of expectations, the granting of powers, and the verification of compliance. Governance mainly consists in making decisions. It is synonymous with *government*

To assess the area of Governance, we have analyzed three key aspects: structures, processes and enablers.

GENERAL ADMINISTRATION

DESCRIPTION

- The members of the General Council are in charge of specific geographical and organizational areas.
- There are five Secretariats in charge of specific issues. The Institute's leading team is periodically elected.

AREAS TO BE IMPROVED

- Some key dimensions are not covered properly: geographical footprint, resource management, planning and control.

LEARNED LESSONS

- We can expect greater professionalism regarding the interaction with the AUs in all dimensions.
 - There is an opportunity to establish leadership by areas (education, animation, culture, etc.) instead of centering it on projects.
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ADMINISTRATIVE UNITS

DESCRIPTION

- The perimeter of the AUs is clearly defined, but it not necessarily reflects the local particularities and needs, given the variety of legislation in the countries, and the relationship with the Governments and the Church.

AREAS TO BE IMPROVED

- There are some areas needing optimization in the current organization of the AUs.
- Solidarity among the AUs could be strengthened and strategically coordinated.

LEARNED LESSONS

- The continuity of the government strategic direction is not guaranteed over time due to the continuous rotation mechanisms.
 - Cases of regional cooperation have shown the potential for synergy and integration among AUs.
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GOVERNING BODIES

DESCRIPTION

- At the local level, governance is carried out by the Provincial Councils. In order to develop the mission, some AUs have a *Marist Works Council*, whose members are appointed according to their skills, and form a stable management team.
- There is horizontal governance. The links regard people working on similar issues, such as animation, schools and universities, finance, etc.

AREAS TO BE IMPROVED

- The difference in government structures does not favor communication and cooperation across the AUs.
- Horizontal governance is limited in its scope and shared activities.

LEARNED LESSONS

- In the places where there is a Mission Council, there is also an efficient achievement of tangible results.
- Wherever regional initiatives have been launched, the initial results have been sustained.



ROLE OF THE LAITY

DESCRIPTION

- There are insufficient guidelines on how to approach the laity's participation.

AREAS TO BE IMPROVED

- The AUs are approaching the participation of the laity in different ways.

LEARNED LESSONS

- There is a strong effort regarding the participation of the laity in the governing bodies through different formulas (associations, foundations, etc.).

GOVERNANCE AND SHARED RESOURCES

DESCRIPTION

- There are several initiatives aimed at developing human resources with interprovincial criteria.
- Institutional resources are handled primarily at the level of AUs.

AREAS TO BE IMPROVED

- A strong impulse at all levels towards a more professional management would be suitable.
- There is an emerging need for support, and knowledge transfer in some AUs.

LEARNED LESSONS

- There are cases of interprovincial coordination, both locally and globally.
 - Priorities can be set to ensure the Marist mission globally.
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KEY PERFORMANCE INDICATORS (KPIs)

DESCRIPTION

- Sets of indicators are being used to measure the impact of Marist activities in all dimensions (mission, animation, operations, finance, etc.).

AREAS TO BE IMPROVED

- A clear set of common indicators for the assessment of the mission and the strategic government goals is lacking.

LEARNED LESSONS

- Some AUs have developed a KPIs system that includes both qualitative and quantitative parameters.
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ENABLERS

DESCRIPTION

- There are ICT applications and processes at the service of governance.

AREAS TO BE IMPROVED

- There is a need to strengthen shared applications and processes to lead the Organization towards common goals.

LEARNED LESSONS

- Some local applications and processes could be shared.
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PROCESS, STRATEGY DESIGN, PLANNING

DESCRIPTION

- Strategic planning is in place at the global, regional and provincial levels.

AREAS TO BE IMPROVED

- Institutional strategic planning could be communicated better through formal channels.
- Promote a sustainability model regarding social work.

LEARNED LESSONS

- Some AUs are conducting more structured strategic processes, with varying degrees of development. There is an opportunity for internal benchmarking and knowledge sharing.
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Management

Management is an important element in the development of our life and mission. It aims at coordinating people's efforts in order to achieve the established objectives and goals, using the available resources in an effective and efficient way.

It includes planning, organization, staff managing, and the guide or direction of an organization.

ROLES AND RESPONSIBILITIES

DESCRIPTION

- Roles and responsibilities at different levels and regions are assigned according to the different activities.
- The AUs follow different models of organization.

AREAS TO BE IMPROVED

- There are relevant differences between the organizational models of the AUs.
- Economy of scale at all levels of the Institute is very limited.

LEARNED LESSONS

- There are examples of interprovincial collaboration, and efforts to harmonize the organizational structures by Regions.
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TAKING ADVANTAGE OF THE INTERPROVINCIAL SKILLS AND CAPABILITIES

DESCRIPTION

- The joint use of structures and skills between AUs takes place through shared service centers.
- Some AUs are sharing resources.

AREAS TO BE IMPROVED

- In some contexts, efficiency, risk management, and the quality of management as such can be improved.

LEARNED LESSONS

- There are successful experiences of interprovincial collaboration, especially regarding formation and international projects.
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MANAGEMENT IN THE AREA OF MISSION

DESCRIPTION

- There is a clear leadership role in the schools and social works.

AREAS TO BE IMPROVED

- Marist works are heavily dependent on local laws, and on the relationship with the Government and the Church.

LEARNED LESSONS

- Relying on different models, taking into account the local context to carry out the Institute's mission.

FINANCE

DESCRIPTION

- A number of processes are underway, such as accounting systems, planning, and asset control and management.

AREAS TO BE IMPROVED

- There is a need to develop better skills and abilities, and to consolidate a culture based on the measurement of variables, and on decision-making processes.

LEARNED LESSONS

- Keep promoting a financial culture based on hard data, creating global methodologies and processes.
 - We could also leverage the common tools and shared capacities for financial management.
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RISK MANAGEMENT

DESCRIPTION

- A risk-management system is in place.

AREAS TO BE IMPROVED

- There is a need to consolidate risk management at the global level worldwide.

LEARNED LESSONS

- There could be an initial effort to create a first map of potential risks.

COMMUNICATION AND MARKETING

DESCRIPTION

- External communication and the creation of the corporate identity are showing signs of progress.

AREAS TO BE IMPROVED

- There are different brands, different logos throughout the Marist world.
- There are different newsletters. Communication is mainly based on local needs.

LEARNED LESSONS

- There are some cases of Regional cooperation.

RELATIONSHIP WITH OTHER INSTITUTIONS

<p>DESCRIPTION</p>	<ul style="list-style-type: none"> • There is cooperation with different agencies: government, Church, other congregations, and civil society.
<p>AREAS TO BE IMPROVED</p>	<ul style="list-style-type: none"> • There are opportunities to strengthen inter-institutional relations.
<p>LEARNED LESSONS</p>	<ul style="list-style-type: none"> • There are opportunities for further collaboration on specific projects with other branches of the Marist Family.

ACTIVATORS (TECHNOLOGY, HUMAN RESOURCES DIRECTORY, ETC.)

<p>DESCRIPTION</p>	<ul style="list-style-type: none"> • There are some common technology systems and applications. There are shared databases.
<p>AREAS TO BE IMPROVED</p>	<ul style="list-style-type: none"> • There is a need to improve data collection and analysis.
<p>LEARNED LESSONS</p>	<ul style="list-style-type: none"> • There are opportunities to implement economies of scale and resource sharing.



From now on

The next phase of the project revolves around creativity. A new stage to define alternative principles and models opens up after having completed the diagnosis of the current situation with the participation of the most significant leaders from all the AUs. We also need to design an action plan to implement these alternative principles and models.

The General Council must now thoroughly study and discuss this diagnosis, and agree on what results should be considered valid

information to define new patterns regarding AGM, which will be defined from March to July 2015.

During this period, there will be a process of consultation and dialogue with the Provincial Councils. The participation of each AU will be key to prepare the International Assembly, which will take place in Rome from July 10 to 14. This meeting will discuss the proposals for the future and the implementation plan.

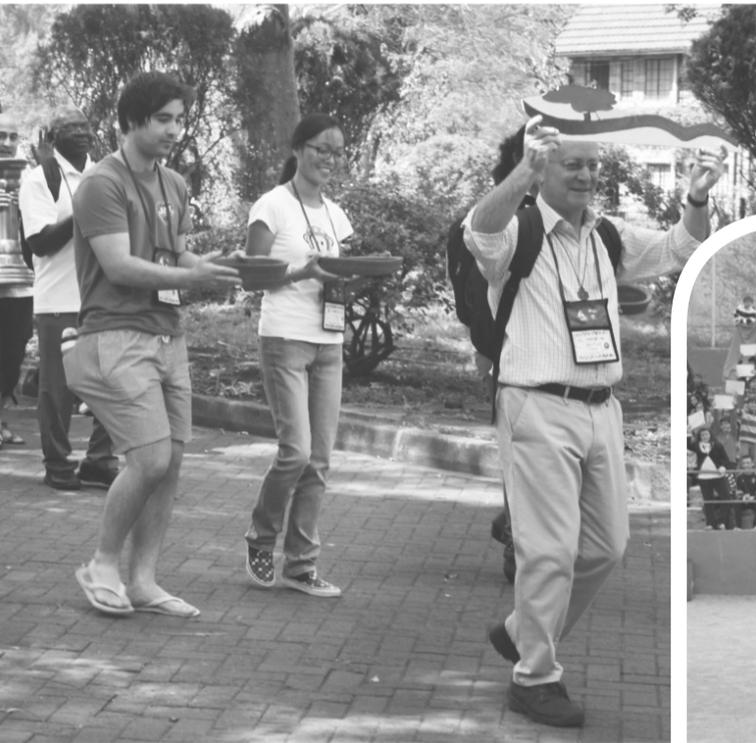
The next phase will be the implementation of the New AGM Models. This last phase will follow a roadmap

defining the appropriate dynamics, the suitable leadership to manage the change, and the necessary resources for its development.

With all this process, we intend to answer the 21st General Chapter's call, and the initial questions that oriented our work:

- How do you want the Marist Institute to be perceived in the world and in your local communities?
- Where is our presence among children and young people most urgently needed?
- What is the place and role of the laity in the Institute, and what is the specific contribution of the brothers to the mission?
- What are the 'vectors of expansion' of the Marist Institute's apostolic endeavors?
- What are the main long-term challenges the Institute must overcome?
- What models can contribute to a greater participation and co-responsibility between the AUs and the General Administration?

We intend to approach the bicentennial of our Institute in the awareness that we are starting a new era, facing a *new beginning*, in which we must promote Marist life and mission by searching new lands through a new AGM style.



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