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Jaime Vergara C.M.

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The Relationship between the Provincial Treasurer and the Visitor and his Council

*by Jaime Vergara, C.M.
Treasurer of Puerto Rico
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1. Number 128 of our Constitutions says that the Provincial Treasurer administers the goods of the province “under the direction and vigilance of the provincial and his council (cf. also C. 153, § 2; Canon 636). Statute 75 indicates, along the same lines, that the Provincial Treasurer “is named by the provincial with the consent of his council.”

The spirit of our norms establishes as a basic presumption that the Visitor (with his council) has the primary responsibility for the administration of the temporal goods of the province. Nevertheless, for the efficient fulfillment of this administrative function, he should value and make use of the Provincial Treasurer.

We must clarify that in no way does the Provincial Treasurer serve a mere vicarious function, but rather, according to Number 128 of our Constitutions, he and no one else is the true administrator of the temporal goods of the province.

Despite this fact, the Visitor is not exempt from being fully informed of the economic situation of the province since he has the final responsibility.

2. So the Provincial Treasurer’s job has no sense except “along side of” the Visitor and his council. Likewise, we can say the Visitor cannot exercise his administrative function without the indispensable help of the Provincial Treasurer.

3. Although it may sound a bit strong, the norm allows us to capture the “subordinate” character of the Provincial Treasurer’s job in relation to the Visitor and his Council. If we follow what Statute 75 says, the primary and immediate relationship is with the Visitor: it is he (the Visitor) who “names” the Treasurer, and the Council “consents” or gives its *placet* to the Visitor’s decision.

What must be underlined are the two terms the Constitutions use: “under the direction and vigilance.” That is to say, there is an external control over the Provincial Treasurer (viz., the Visitor and his Council), and this external control must be attentive to be “vigilant” with regard to the Provincial Treasurer in the exercise of his office.

But what is the real extent of the “vigilance” or “monitoring” the Visitor and his Council should observe with regard to the office of Provincial Treasurer? Or better, what are the “nuances” that should be pointed out in this “direction and vigilance”? The answer to this question should get to the essence of the Provincial Treasurer’s function: he exercises his function in the context of a particular province, which is part of a whole, the Congregation of the Mission, which, as Constitution 148, § 1 says, administers its goods “for the service of God and the poor.”

Consequently, we may say the Provincial Treasurer is, in a few words, “a delegate.” It is the Visitor who delegates to him everything concerning the financial administration of the province.

4. In this same line, Statute 77, 6° points out that the Provincial Treasurer should “make a report of his administration to the provincial and his council.” The question here should be: When? How? The immediate response is whenever the Visitor and his Council so decide. Even though the Provincial Norms (or the Provincial Project) should stipulate previously the manner and the moments this report should be made.

The main point to be emphasized is that the function of the Provincial Treasurer is in no way “independent,” since he should always report, whenever the Visitor and his Council ask him, about any financial movements. This will guarantee the transparency of his office or service, to say nothing of the greatest discretion in his exercise of it.

5. Finally, it may be important to ask about the possible areas of conflict in this relationship we have been describing. If any conflict is possible, then it is also important to visualize concrete ways of resolving these areas of conflict.

One element that may be a cause of friction is the reality of the “autonomy.” Here we mean the “limits” or boundaries between the essence of the role/service rendered to the province and the demands or attributions the “other” may permit himself with regard to this function. When freedom of action or opinion is suffocated, the normal reaction is self-defense, which is normally accompanied by a certain anxiety or internal disquiet, which, in the majority of cases, turns into confrontation. This must be kept in mind. On the other hand, it is worth noting that the Provincial Treasurer is in no way a “peon” at the Visitor’s service. His function has a specific weight and essentiality that are unavoidable, even though he should carry it out under the guidance of the Visitor and his Council.

Necessary Bases for a Good Relationship

The **dialogue** that should exist between the Visitor/Council and the Treasurer is an essential element for good administration, and should be seen as a normal process. Given the importance and responsibility the Provincial Treasurer has, it is only common sense that the Provincial Council call him whenever matters related to his office are treated. The Visitor's real Counselor in financial matters is the Provincial Treasurer, even though he may not be a member of the Provincial Council.

The **confidence and support** that the Visitor demonstrates to his Treasurer come not only from listening to his opinion, but also from studying, in Council, the proposals the Treasurer may make to him, and from seeking sound advice together. The Visitor and the Treasurer must form a consensus when the time comes to name the members of the Provincial Finance Committee (cf. "Ordinance of the Superior General about the Finance Committee" [Rome, July 1, 2001], in *Vincentiana* 45 (2001) 447-453).

Mutual discernment at decision-making time is essential. It is a good idea, unless the Visitor judges otherwise, that financial decisions be made in the presence of the Treasurer so he may hear the ideas of the whole Council and, in that way, may be able to clarify the final decision. Long and short range planning of provincial finances should be done taking into account the advice of the Treasurer: investments, closing/opening of works, formation of missionaries, health and retirement insurance, attention to the aged and infirm, special contracts of missionaries for other provinces, aid/help sought for other necessities. The Treasurer should take care not to try to "impose his criterion" because of good administration.

Transparency must be evident in every activity carried out and in all the information presented at the Council table by both sides. This same transparency, always by mutual accord, should exist in the information the Treasurer presents to the Assemblies or the different communities of the province. It inspires confidence in the members of the province when they see the Visitor and the Treasurer giving combined reports, visiting houses together, seeking advice together, etc.

A close and healthy relationship with professional advisers, by the Visitor as well as the Treasurer is advisable. It is a good idea that both maintain "a certain distance" from their advisers. They should never see conflicting opinions between the Visitor and his Council and the Treasurer. "Old-boy systems" do not inspire confidence and much less the interference of family members.

Non-interference in each other's functions supposes respecting each other's area. In reality, today, the Visitor is responsible for the goods, but not for

their direct administration. The Provincial Treasurer should be very respectful of the financial direction established by the Visitor and his Council, always in consonance with the orientations of General and Provincial Assemblies.

Effectiveness and fidelity must be evident when it is time to implement the financial decisions made by the Visitor and his Council. The Treasurer, like any other Council member, must take on with special interest the assignments delegated to him by the Visitor so that there may be a correct and effective provincial administration. The Treasurer should have the vote of confidence so he can carry out his job without the need for continuous consultation.

All these elements contribute positively to an active collaboration in the joint responsibility of handling correctly the patrimony of the poor.

Finally, I bring to your consideration the need or the clear usefulness of preparing and editing a “Practical Guide for the Provincial Treasurer” just as the Visitor has for the exercise of his ministry.

Some Inspiring Texts

“It is the Superior’s job not only to look after spiritual things, but he must also concern himself with temporal things; since the men he directs are made up of body and soul, he must see to the needs of the one and the other” (SV XI, 350).

“He should not dedicate himself only to what is most elevated, such as those functions which concern spiritual things; it is necessary that the Superior, who in a certain way represents all the extension of God’s power, also attend to the smallest temporal needs” (SV XI, 350).

“In each province there must be a treasurer to administer the goods of the province under the direction and vigilance of the provincial and his council” (C 128).

“The treasurer is named by the provincial with the consent of his council, or by some other way enacted in the provincial norms” (S 75).

“In each province of the Congregation of the Mission a finance committee will be established. It shall be presided over by the provincial superior or his delegate. It shall be composed of the provincial treasurer and at least three other members, knowledgeable in financial matters and the related portions of civil law, some of whom may be lay persons. It shall have an advisory role, offering recommendations to the provincial and the members of his council. The members of the finance committee shall be appointed by the provincial for a three-year

term, which is renewable” (“Ordinance of the Superior General about the Finance Committee,” Rome, July 1, 2001, in *Vincentiana* 45 (2001) 447.

Some documents to bear in mind

1. Constitutions and Statutes of the C. M.
2. Notes from the meeting of Fr. Patrick J. Griffin, C.M. with the Provincial Treasurers, (Paris, summer of 1995)
3. Practical Guide for the Visitor (Nos. 240-247 and 309)
4. Meeting of the Visitors of the C. M., Salamanca, 1996: “Profile of C.M. Visitor as Administrator. An Econome’s Perspective,” by Patrick J. Griffin, in *Vincentiana* 40 (1996) 266-273.
5. “Ordinance of the Superior General about the Finance Committee” (Rome, July 1, 2001), in *Vincentiana* 45 (2001) 447-453.

(JOSEPH CUMMINS, C.M., translator)