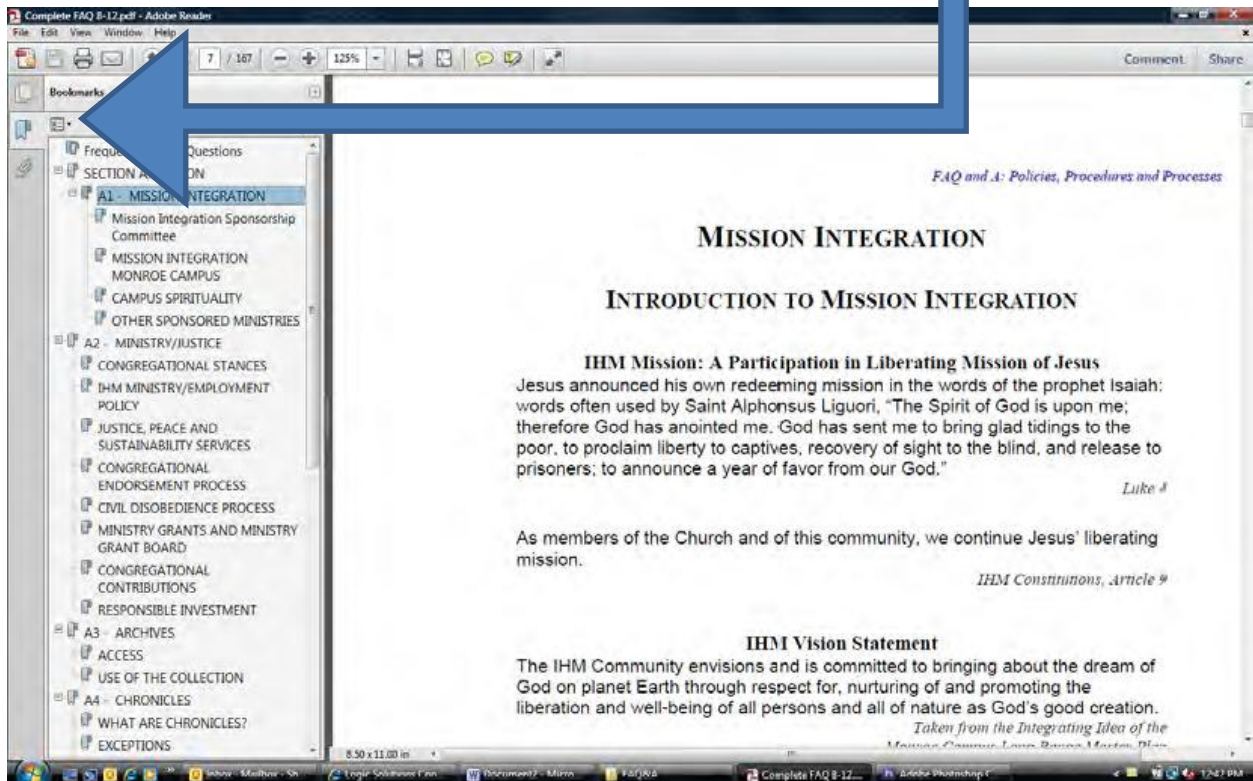


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FREQUENTLY ASKED QUESTIONS  
AND ANSWERS:

POLICIES, PROCEDURES AND PROCESSES OF THE  
SISTERS, SERVANTS OF THE IMMACULATE  
HEART OF MARY

MONROE, MICHIGAN, U.S.A

## *SECTION A. MISSION*

# MISSION

## INTRODUCTION TO MISSION

### **IHM Mission: A Participation in Liberating Mission of Jesus**

Jesus announced his own redeeming mission in the words of the prophet Isaiah: words often used by Saint Alphonsus Liguori, “The Spirit of God is upon me; therefore God has anointed me. God has sent me to bring glad tidings to the poor, to proclaim liberty to captives, recovery of sight to the blind, and release to prisoners; to announce a year of favor from our God.”

*Luke 4*

As members of the Church and of this community, we continue Jesus’ liberating mission.

*IHM Constitutions, Article 9*

### **IHM Vision Statement**

The IHM Community envisions and is committed to bringing about the dream of God on planet Earth through respect for, nurturing of and promoting the liberation and well-being of all persons and all of nature as God’s good creation.

*Taken from the Integrating Idea of the  
Monroe Campus Long Range Master Plan  
Affirmed by the IHM Chapter 2000*

### **IHM Mission Statement**

Urged by the love of God we choose to work with others to build a culture of peace and right relationship among ourselves, with the Church and the whole Earth community.

*Based on Underlying Direction of Chapter 2000 Directions  
Affirmed by IHM Coordinating Council, April 2003*

## **MISSION**

### **MISSION INTEGRATION SPONSORSHIP**

Mission Integration Sponsorship ensures the incorporation of the IHM mission and values into our sponsored schools and ministries now and into the future.

#### ***Major Policy***

The IHM Congregation exercises canonical sponsorship of its educational institutions.

*Approved by SIHM Congregational Governing Board, October 1992*

The IHM Congregation, building on legal and canonical sponsorship, commits itself to strengthening relationships of mutual respect and responsibility with its sponsored educational institutions. The Congregation will work with each of the educational institutions to develop a variety of means to enhance mutual interaction between the Congregation and the institutions, as well as among the institutions to foster greater understanding and integration of the IHM mission.

*Adopted by IHM Coordinating Council, November 1997*

*Revised and approved by IHM Coordinating Council, November 2007*

#### ***Operational Policies***

- Each of the educational institutions sponsored by the IHM Congregation functions as a separate corporate entity, according to the laws of the state in which the institution is located. The Articles of Incorporation and Bylaws describe the specific purpose of the corporate entity.
- The elected officers of the Congregation serve as members of these corporations and possess certain “reserved powers” required by canon law to safeguard the mission of the institution and its assets.
- A Board of Trustees (Directors) assumes responsibility for the governance of each institution. The Bylaws of each corporation enumerate the powers exercised by the Trustees (Directors).
- The Leadership Council appoints members of governing boards of congregationally sponsored institutions in accord with the provisions of the Articles and Bylaws of each of these institutions.
- The IHM Congregation exercises sponsorship by being part of faculty, staff, and administration, as well as through membership on boards.
- The IHM Corporation Board leases the buildings and grounds of each congregational institution to the Board of Trustees (Directors) for a specified sum. Each institution is responsible for taxes, utility expenses, insurance costs, maintenance, and capital improvements.
- The congregational liaison to IHM sponsored educational institutions is responsible for providing orientation and ongoing education regarding the mission of IHM sponsored

schools and IHM philosophy, goals, and directions to the board and all members of each educational community.

### ***Mission Integration Sponsorship Committee***

#### *Purpose of the Mission Integration Sponsorship Committee*

1. To ensure the integration of the IHM mission and values into our sponsored schools and ministries now and into the future.
  - To develop a plan of formation for future trustees/directors and Member Board members.
  - To continue the ongoing education of trustees/directors and, in collaboration with the administration, be a resource for the ongoing education of all employees.
  - To recommend to the Member Board persons to fill the IHM appointed trustee/director positions.
  - To monitor the IHM Mission Integration review process for the institutions.
  - To recommend the integration of mission and values into hiring, orientation and evaluation of employees.
  - To review in conjunction with the leadership of the institutions how the IHM Mission is integrated into the strategic planning for our sponsored schools.
  - To explore ways to integrate the IHM mission into evolving ministries to which IHM lends its name.
  - To work with the Mission Integration Coordinator.
2. To raise, explore and assess governance and canonical issues relating to our schools and other sponsored ministries in the following ways:
  - To research future governance options for our IHM schools and other sponsored ministries.
  - To recommend governance options for our IHM schools and other sponsored ministries based on assessment and exploration of best practice.
3. To collaborate with the Monroe Campus Mission Integration Committee.

#### *Committee Composition and Terms*

The Committee is composed of appropriate Leadership Council liaisons, the Mission Integration Coordinator, and four or five others with expertise and experience in the area of governance who are appointed by the Leadership Council.

Committee member terms will be based on need and availability. The terms will run for three years with the option of renewal. Terms will be staggered to ensure continuity between Leadership Council terms. The Committee will self select the chairperson.

*Affirmed by Coordinating Council, November 2011*

*Approved by Leadership Council, December 2011*

### ***Sponsored Institutions***

*Marygrove College* an independent, Catholic, liberal arts college sponsored by the Sisters, Servants of the Immaculate Heart of Mary is committed to fostering Christian values, to educating students from diverse backgrounds and to serving the people of metropolitan Detroit and beyond. Marygrove's buildings and grounds were transferred to the Marygrove Board of Trustees in July 2009.

*Marian High School* is a Catholic college preparatory school for young women in the Archdiocese of Detroit. Founded in 1959 and sponsored by the Sisters, Servants of the Immaculate Heart of Mary in Monroe, the school is located in West Bloomfield, MI and has served hundreds of young women in the Detroit metropolitan area. The mission of Marian High School is to ensure, within a Christian environment, an excellent education built on a strong academic curriculum, which will enable young women to value human diversity and live responsible lives of leadership and action based on gospel values.

*Detroit Cristo Rey High School* is a Catholic college preparatory school jointly sponsored by the Sisters, Servants of the Immaculate Heart of Mary and the Basilian Fathers. The mission of the Cristo Rey Network is to empower thousands of students from underserved lower-income communities to develop their minds and hearts to become lifelong contributors to society. By providing students an extraordinary college preparatory education and a unique four-year, integrated corporate work study experience, they seek to help transform urban America.

#### ***Archdiocesan Sponsored School***

*St. Mary Catholic Central High School* in Monroe is not an IHM sponsored educational institution, but we are very committed to this vicariate school. St. Mary Catholic Central (SMCC) is a heritage school formed from the 1986 merger of St. Mary Academy and Monroe Catholic Central. SMCC continues the church's educational tradition in Monroe that began when the Sisters, Servants of the Immaculate Heart of Mary founded St. Mary Academy in 1846. The Brothers of Holy Cross came to Monroe in 1944 to staff Monroe Catholic Central, a new all boys Catholic secondary school established by the Archdiocese and several local parishes. The schools merged in 1986. It states as its mission: "Building on the charism of our founders, St. Mary Catholic Central High School is a Christ-centered learning community forming lives in a tradition of faithfulness to the Gospel, educational excellence and service to others."

### ***Mission Integration Monroe Campus***

#### ***Major Policy***

The Mission Integration Committee for Monroe Campus commits itself to working with employees to share the IHM charism and mission. The committee, which is made up of representatives from key departments on campus, works with the human resource department to ensure formation for new employees as well as on-going formation for long-term employees.

### ***Mission Integration Monroe Campus Committee***

#### *Purpose of the Mission Integration Monroe Campus Committee*

The purpose of this committee is to ensure that the IHM culture and mission are understood by our employees so that it will be carried into the future.

#### *Committee composition and terms*

The Committee consists of representatives from the Motherhouse administration team, human resources, spirituality on campus, pastoral care, campus administration, health care and the leadership council. The Mission Integration Coordinator also serves on this committee.

#### *Functions*

The committee sponsors a day-long employee orientation which includes: sharing of community history, meeting and sharing lunch with the sisters, and meeting all department heads with an overview of the goals and scope of the departments. The day ends with a prayer service at River House.

The committee also sponsors staff events, such as an annual “all staff” picnic, celebrations for “Earth Day,” Founders’ Day, mentoring programs, and “meet and greet” lunches as a means of having sisters and staff interaction.

## **CAMPUS SPIRITUALITY**

The Long Range Master Plan sets a vision for our IHM Monroe Campus to be a center of transformation of consciousness rooted in the core value of sustainability of life in all its forms. Spirituality is identified as permeating the entire integrated master plan, with a spirituality center as a key component. Through participative group process, the congregation identified three core values to be embodied on campus: reverence for the sacredness of all life, contemplation as an ongoing spiritual practice, and hospitality.

In 2009, the position of Coordinator of IHM Campus Spirituality was established to move forward the spiritual vision for the campus. The Coordinator of IHM Campus Spirituality is committed to ministry and mission rooted in the Judeo-Christian tradition and its dialogue with other spiritual traditions and the contemporary world. Working collaboratively with the members of the IHM congregation, the many departments of the IHM campus, and the Leadership Council, the Coordinator of IHM Campus Spirituality is charged with the responsibility to create an innovative and collaborative approach to spirituality on campus, such that diverse expressions of IHM spirituality might be celebrated in a variety of ways and means, the spiritual resources of the campus might be made more visible and accessible to the broader public, and the core vision of the campus might be served. One of the first responsibilities of the Coordinator of IHM Campus Spirituality was to move the Spirituality Center from Visitation to



its new home at River House, and to continue to serve as the spirituality center's representative, coordinator and spokesperson.

Becoming a center of transformation of consciousness is an evolving challenge. IHM Chapter Directions provide a framework for this ministry. Currently, the Leadership Council gives priority to the integration of the "Four Stories". In-depth conversations regarding our evolving sense of God and our complicated relationship with the Church, to which the IHM congregation currently commits itself, will also have significant impact on our IHM Monroe Campus Spirituality.

### ***River House – IHM Spirituality Center***

Located on the banks of the River Raisin and directly across from the Motherhouse of the IHM Sisters, River House is a stately brick home offering hospitality and enrichment for spiritual seekers of all faith traditions.

Come to River House to find:

- Space for quiet solitude, reflection and prayer
- Companionship on the spiritual journey through spiritual direction, study circles, and rituals of celebrations
- Retreat opportunities for both individuals and groups, with overnight accommodations for up to eight people
- Spacious rooms and grounds for hosting day programs or evening gatherings
- Access to the spiritual resources of the entire IHM campus:
  - join us in liturgy and other times of prayer*
  - explore the library*
  - attend enrichment events and programs*
  - visit with the sisters*
  - walk the grounds*
  - pray the labyrinth*
  - work in the organic garden*
  - learn earth & justice advocacy*

It is the sisters' hope that their entire campus will serve as a center of transformational learning, combining educational, spiritual and socially inspiring opportunities as we all grow to understand and take responsibility for our human role within Earth's delicate and threatened web of life.

For detailed information and a calendar of specific events, visit River House at [www.ihmsisters.org](http://www.ihmsisters.org) and click on Spirituality. Or stop by and talk with staff during normal business hours.

## **OTHER SPONSORED MINISTRIES**

### ***Visitation North Spirituality Center***

Visitation North Spirituality Center is a place of welcome for all who seek quiet space, spiritual companionship or opportunity for spiritual growth. As a ministry of the Sisters, Servants of the Immaculate Heart of Mary, we are rooted in Catholic Christianity yet consider ourselves enriched by seekers of other faith traditions.

We take our inspiration from the visit between Mary and Elizabeth who spent time together sharing their joys and hopes, their confusion and their fears as they tried to be faithful to what God was asking of them. In a similar way, we accompany those women and men who endeavor to recognize God's action here and now in their daily lives.

We do this by:

- Creating an environment for reflection and sharing — for individuals and groups
- Providing gatherings that address aspects of a reflective life:
  - Studying Scripture
  - Praying in a variety of ways
  - Becoming everyday contemplatives
  - Discovering the giants of Christian spirituality
  - Knowing our faith community
  - Hearing God's call to us through the cries of the human community and through the Earth itself
- Responding to requests to travel to other sites through Visitation-on-Call. Specifically, we offer:
  - Spiritual direction, companionship
  - Retreats in daily life
  - Retreat days for groups
  - Presentations on current issues
  - Seasonal offerings (Advent, Lent)
  - Book discussions
  - Reflections on ministry
  - Creative space for artists

For additional information, contact

Visitation North  
7227 Lahser Road  
Bloomfield Hills, MI 48301  
Phone: 248-433-0950  
Fax: 248-433-0952  
E-mail: [visitationnorth@ihmsisters.org](mailto:visitationnorth@ihmsisters.org)  
Web site: [www.visitationnorth.org](http://www.visitationnorth.org)

## MINISTRY/JUSTICE

### INTRODUCTION: DISCERNING IHM MINISTRY IN THE CONTEXT OF THE IHM CONSTITUTIONS AND RECENT CONGREGATIONAL DOCUMENTS

#### **From *IHM Constitutions***

##### **Call to Discernment**

While many of us experience the desire of Louis Florent Gillet to be everywhere when we see so many needs, we realize that we cannot respond to every need. Therefore, we commit ourselves to prayerful discernment in our choices of ministry.

*Article 12*

We reverence the work of the Spirit in each sister as she discerns her ministry in the light of community goals and in consultation with

- the people she hopes to serve,
- her co-ministers,
- her local community, and
- our community leaders.

As a community, we affirm each sister who is sent in ministry by our elected community leaders.

*Article 14*

##### **IHM Response to Needs of the Times**

With Jesus, we share the joys and hopes, the grief and anguish of all our sisters and brothers in the human family.

*Article 10*

##### **For Justice and Peace**

In our struggle to live the gospel today, we recognize our call to serve the needs of God's people not only through the traditional works of mercy, but also by working with others to eradicate the causes of injustice and oppression and to help create structures that will promote justice and peace and bring unity among all peoples.

*Article 11*

In that discernment, we urge one another to be conscious of the poverty, hunger and injustice suffered by the great majority of the human family and to make choices which clearly reflect that, with Mary of the Magnificat, we stand with and for the poor.

*Article 13*

##### **Through Education**

In a special way, we are committed to the work of education, a ministry in which our community has been engaged for over a century.

*Article 11*

### **Through Corporate Ministries**

Striving to be attentive to the signs of the times and sensitive to the needs of particular groups of people, the community itself may undertake corporate works and call members of the community to ministry in these works.

*Article 15*

### **In Mutuality in Ministry**

Finally we commit ourselves to mutuality in ministry, desiring that our love, reverence and support of one another be reflected in the way we affirm, encourage, and work with our co-ministers and with each of the persons among whom we serve.

*Article 17*

### **Relying on the Strength and Inspiration of the Spirit**

In all we do to respond to the needs of God's people and to proclaim the reign of God, we rely on the strength and inspiration of the Holy Spirit.

For this reason, we dare to speak God's word with boldness and to risk deeds our own hearts could never dream, so that whatever the outcome, we may say in the spirit of Louis Florent Gillet:

I began without thinking of the future of the work, leaving it to God alone to bless and make it prosper, if it were pleasing to God and useful for the good of others.

*Article 16*

## **From IHM Assembly Directions and Chapter Enactments**

### **Affirmation 10**

At this time communal discernment directs us to channel the resources of our congregation, through our various works, toward the eradication of the causes and forms of oppression and toward the creation and promotion of structures which will correct inequities in society and disunity among (people).

*Assembly '72*

In the spirit of Affirmation 10 (IHM Constitutions, Article 11), and with a growing sense of the interdependence and unity of all creation as central to an emerging world view, we feel compelled:

- to stand in solidarity with those who suffer in a world characterized by fragmentation, violence, and poverty;
- to participate in the shaping of a new world order consonant with gospel values of harmony and unity, peace and justice, and an equitable sharing of the world's resources;
- to nurture a reconciling and healing community among ourselves and beyond;
- to live and work non-violently toward a world of peace with justice;
- to give priority to the special claim of the materially poor on us;

- to implement the above wherever we serve, and, at this time, particularly in the city of Detroit.

*Assembly '87*

In the light of Affirmation 10 and the Direction Statement of 1987, we choose to give strengthened priority to the materially poor and to make that priority explicit in our choices and decisions.

*Chapter 2000*

### **Education**

The IHM Congregation reaffirms its commitment to education as a ministry at all levels to promote justice and hope for the oppressed.

*Assembly '80*

Given that formal education is a fundamental, long, and rich IHM tradition, and that education, in its many forms, can be a process for liberation, we commit ourselves to ongoing education of ourselves and others in areas crucial to our life and ministry. At this time we particularly pledge ourselves to:

- analyze, critique, and transform structures that keep the laity voiceless in the Church, and women in a state of oppression in both Church and society.
- acknowledge our own aging process, plan and prepare for retirement, develop ministries with and for older persons, and celebrate the lives of older persons as sources of power and wisdom.

*Assembly '87*

### **Feminist Perspective**

Reflecting on our experience as women in the Church and society, and sensing the need for a critical understanding of what we have experienced ourselves individually and corporately, we consciously choose to educate ourselves in the feminist perspective, and to operate from our understandings as they develop.

*Assembly '87*

### **Peacemaking**

The most strongly supported goal of Assembly '80 stated that,

Because of the increasing danger of nuclear holocaust we commit ourselves to work with others of the human community to raise consciousness about and to resist the evils of the arms race and increased militarization throughout the world.

The Chapter of 1982 re-stated this concern by endorsing the LCWR Resolution on Disarmament. Again in Assembly '87 we committed ourselves to

- nurture a reconciling and healing community among ourselves and beyond, and
- to live and work non-violently toward a world of peace with justice.

Recognizing the escalation of violence in our world, and especially its impact on women and children, we choose to act with diligence in the pursuit of peace and non-violence. We will do so

- by healing and allowing ourselves to be healed
- by forgiving and allowing ourselves to be forgiven
- by standing firm against violence and injustice
- by partnering with others working for peace and against violence
- by working for it through our ministries
- by our language and action, both personal and corporate.

*Chapter 2000*

### **Non-Violent Civil Disobedience**

...we affirm and support members who feel in conscience called to engage in an act of non-violent civil disobedience in pursuit of justice. We endorse the discernment process which congregational leaders and these individual members have used to determine this course of action.

*Chapter 1982*

### **Conscientious Objection**

As a Chapter body we support those persons, who by reason of conscience, resist being drafted into military service. Further, we urge the members of the Congregation to search out ways in which we can manifest support (e.g. sanctuary) and bring such specific means of support before the entire Congregation through the congregational stance process.

*Chapter 1982*

### **With Hispanics**

As a priority, we the Congregation do commit ourselves:

- to create an awareness of the needs of the growing Hispanic community in our country;
- to encourage our membership to understand Hispanic culture through education;
- to call forth members to respond to and to prepare for active ministry to the Hispanic peoples in order to promote systemic change.

*Assembly 1980;1993*

### **With Haitian Refugees**

...That (we) investigate the possibilities for ministry among Haitian refugees.

*Chapter 1982 Enactment*

### **With Those Affected and Infected by HIV and AIDS**

...that the Congregation collaborate with other groups such as LCWR and the Southern African Catholic Bishops' Conference to develop an appropriate response to the global pandemic of HIV/AIDS, recognizing especially its devastating impact on the children and the future of Africa.

*Recommendation to the Leadership Council from the Chapter of 2000*

### **1994 Enactment on Eco-Justice**

We, as members of the planetary community, recognize and respect the sacredness and interdependence of all creation. We are aware that when we

lose the reverence for and awe of creation, as well as an understanding of our place as partners within the earth community, our sense of God and of ourselves is diminished.

*Adapted from the IHM Environment Committee Statement*

Therefore:

The participants of Chapter '94 commit themselves and call the IHM Congregation to continue to develop and act out of an ecological consciousness, individually and corporately.

Specifically this means:

- a) instituting through the Environment Committee a continuing process of re-education;
- b) intentionally developing the new personal asceticism of an ecologically responsible lifestyle;
- c) evaluating and revising current congregational policies and practices in light of the new consciousness; and call congregationally sponsored institutions to do so also;
- d) joining with and/or initiating groups to act on local ecological issues, with special attention to the impact on the poor and minority communities;
- e) collaborating with others in shaping public policies that will foster ecological co-responsibility and eco-justice.

*Chapter Enactment 1994*

We choose to work collaboratively to create a culture of right relationship with the earth community, a relationship marked by sustainability and eco-justice. We will do this through our varied ministries, by educating ourselves and through our life-style choices, both personal and corporate.

*Chapter 2000*

Convinced that the plight of the Earth is intimately connected to global poverty, violence and oppression, we commit our personal and communal efforts and resources to build sustainable community. This commitment challenges us both to personal transformation and systemic change...

*Chapter 2000*

## **Energy**

### *Conversion of Fermi II Nuclear Power Plant*

...that the Chapter endorse the resolution of the Monroe County Board of Commissioners to ask Detroit Edison Company to convert its nearly completed Enrico Fermi II nuclear power plant to a non-nuclear generating plant.

*Endorsed by Chapter 1982*

### *Chapter 2000 Underlying Direction*

We believe that everything before us brought us to this moment and we claim our future directions within the richness of our tradition.

Impelled by the growing realization that we are interconnected with the whole web of life, and that the escalation of violence, increasing global poverty, and the exploitation of the earth threaten all of creation, we renew our passion to live the liberating mission of Jesus in the spirit of humility, simplicity and zeal.

We choose to en flesh this call by working with others to build a culture of peace and right relationship among ourselves, with the Church and with the whole earth community.

*Chapter 2005-2006*

In a world marked on the one hand by beauty, compassion, generosity and possibility and on the other by poverty, hatred, injustice and violence:

We choose

- to extend the liberating mission of Jesus in creative ways as urged by the Spirit;
- to be in solidarity with one another and all those who struggle to articulate and live their experience of faith in our complex world;
- to give prophetic witness with courage and integrity in the Church and in society, both individually and corporately;
- to invite partnership in building a culture of sustainability wherever we live and minister, with particular attention to the Detroit and Monroe areas, places of our historic presence.

We affirm and recommit ourselves

- to prayer, study and sustained conversation about our faith journey in the search for the Divine;
- to more effective ministry and presence with the poor and marginalized in all our ministries;
- to engage, with a sense of urgency, in conversations with Marygrove College regarding our mutual relationship and commitment to its educational mission;
- to revitalize the Coordinating Council and Mission Units to be more participative in decision-making for the sake of mission and the quality of our relationships;
- to deepen our commitment to the unfinished work of the Chapter 2000 Directions.

*Integrating Idea for the Monroe Campus Long Range Master Plan*

*Preamble*

In the face of social and spiritual needs, we are called to personal conversion and structural change. The alienation of people from the earth and each other; unequal access to the resources of the planet; pollution of our land, air and water; oppression of many people for the material benefit of a few; and the continuous promotion of consumerism call us to respond with a renewed vision.



Our own resources are changing and calling us to focus our attention to effective use of our land, buildings and energies in the face of these needs.

*Vision*

This envisions the entire SSIHM Monroe Campus as a center of new growth and new learning, of transformation of consciousness through transformation of land and building use and through personal, corporate and systemic conversion of mind and heart. It sees the center as a sacred place actualizing the faith dimension of the core value of sustainability of life in all its forms.

The center will be animated by the IHM foundational belief that our life commitment is to bring about the dream of God on planet Earth through respect for, nurturing of and promoting liberation and well-being of all persons and all of nature as God's good creation. We see the center developed not only to meet our own needs but in relation with others to carry the mission forward beyond our lifetime.

Because living sustainably requires a transformation of consciousness and because of the IHM Congregation's historic commitment to education as a transformative process, the center will have an educational focus. This means the campus as a whole will provide opportunities for learning and experiences necessary for transformational education of mind, body and spirit. The campus will educate around and be expressive of the best knowledge and experience in areas such as spirituality, theology, ecology, social justice, public policy, advocacy, organic agriculture, food service on the campus, sustainable methods of energy generation and uses of land, holistic health care for the aging and intergenerational living.

*This document is also available at <http://www.ihmsisters.org>.*

## **MINISTRY / JUSTICE**

### **CONGREGATIONAL STANCES**

#### ***Major Policy on Congregational Stances on Justice and Human Rights Issues***

The IHM Congregation articulates congregational stances to address significant justice and human rights issues.

#### ***Operational Policies***

A congregational stance may be articulated in one or more of the following ways:

- Elected congregational leaders, in accordance with Article 24 of the *IHM Constitutions* may speak in the name of the membership.
- The Coordinating Council, in accordance with Article 105 of the *IHM Constitutions* may articulate congregational positions of urgent ecclesial and societal situations.
- The membership may be involved in a process determined by the Congregational Stance Guidelines approved by the 1982 Chapter.
- Our *IHM Constitutions* and Chapter and Assembly documents guide the decisions of all when speaking in the name of the Congregation on these issues.

*Approved by SSIHM Congregational Governing Board, April 25, 1993*

#### ***Criteria and Process for Making a Congregational Stance***

Criteria for taking a congregational stance include the following:

- surfacing of issues comes from within the Congregation.
- the issue represents a violation of human rights.
- the issue involves principles mandated by the gospel and Church teaching.
- the issue reflects local, national, and global interdependence.

Elements of this process include:

- **Education**  
In order to make an enlightened individual and congregational decision, various aspects of the issue will be studied. Prayer, fasting, reflection on the Gospel and appropriate Church and congregational documents will complement the study.
- **Consensus-building**  
In order to assure commitment to the stance, consensus-building will be the mode of the process. Any group which agrees could take a stand in its own name even without congregational consensus.
- **Decision**  
A congregational corporate stance will be taken if 60% of those participating in the process approve and no more than 7% of those participating actively oppose.

- **Communication**  
The results of the process will be sent to the total Congregation. Elected leadership will be responsible for communicating the stance to appropriate publics. Once a stance is taken, the leadership of that group can speak in its name as specific instances arise.

*Chapter 1982*

*Approved by Advisory/SSIHM Congregational Governing Board,  
March 1983; October 1983*

*Reviewed by Advisory/SSIHM Congregational Governing Board, October 1985*

*Reviewed by SSIHM Governing Board, April 1993*

## ***Congregational Stances***

### *...on Military Oppression in Puerto Rico-October 15, 1983*

We, the IHM Congregation, denounce the U.S. Military oppression of the Puerto Rican people.

### *...on Central America-June 1, 1984*

We, the IHM Congregation,

- oppose U.S. military aid to the governments of El Salvador, Guatemala, and Honduras, and all U.S. military intervention in that region;
- demand an end to CIA-supported attacks against Nicaragua;
- support a negotiated settlement of the conflicts in Central America in order to achieve a just and lasting peace in the region.

### *...on Sanctuary Movement-March 21, 1987*

We, the Sisters, Servants of the Immaculate Heart of Mary, endorse and support the Sanctuary Movement as a ministry of justice and compassion that follows the law of the United States (as agreed to by the U.S. Government in the 1980 Refugee Act and the United Nation's Protocol on Refugees) in offering asylum to refugees from El Salvador and Guatemala in the face of life-threatening situations in their homelands.

We authorize the leadership of the Congregation to speak in the name of the Congregation, and we pledge ourselves to implementing this Congregational stance to search out ways:

- to educate others about the plight of these refugees and about the meaning of sanctuary;
- to support those involved in the sanctuary ministry;
- to help Central American refugees in this country."

### *...on Haiti*

The IHM sisters and associates, impelled by the gospel (Luke 4: 18-19) stand in solidarity with the people of Haiti, the poorest in the Americas, in their struggle for dignity, life, and human rights both in Haiti and in the United States.

*Oblate IHM Statement approved by IHM Central Administration, February 1993*

*Approved by SSIHM Congregational Governing Board as a  
Congregational Stance, April 25, 1993*

*...on the Death Penalty*

We, the IHM Congregation, oppose the death penalty. The Gospel and Catholic social teaching impel us to do so.

*Approved by the SSIHM Congregational Governing Board, October 17, 1993*

In January 2004, the IHM Justice, Peace and Sustainability Office began coordinating and resourcing the Motherhouse community in a monthly commemoration of For Whom the Bell Tolls, a national initiative opposing the death penalty that remembers those executed and their victims, their families and the employees charged with conducting executions, as a reminder that we are all diminished by continuing acts of state-sponsored violence.

*... on Racial Healing*

The Congregational Governing Board endorsed the “Detroit Principles: A Doctrine for Fairness,” which has been developed by the Race Relations Council of Metropolitan Detroit. This document provides moral direction on issues having to do with race relations. The Detroit Principles advocate for equality for education, employment, housing, health care and safe neighborhoods and respect for racial and ethnic diversity:

1. We believe in equal education. Every member of this community will have equal access to an effective education
2. We believe in equal employment. Every member of this community will have equal access to useful employment. There will be no discrimination in job opportunity and benefits based upon race or ethnicity.
3. We believe in equal housing. Every member of this community will have access to quality housing, unimpeded by any restrictions based upon race or ethnicity.
4. We believe in equal health care. Every member of this community will have equal access to quality health care.
5. We believe in equally safe neighborhoods. Every member of this community will be safe and secure in his or her person and property.
6. We believe in diversity. Racial and ethnic diversity in our community will be respected, nurtured and celebrated.

*Race Relations Council of Metropolitan Detroit, October 1992*

*Approved by SSIHM Congregational Governing Board as a Congregational Stance, April 25, 1993*

*Undoing Racism Statement*

As the Oblate IHM Board of Directors, representing more than 2,000 Catholic women religious, the Oblate Sisters of Providence (Baltimore, MD) and the Sister, Servants of the Immaculate Heart of Mary (Monroe, MI, Immaculata and Scranton, PA), we condemn the sin of racism and stand in opposition to the ongoing existence of this evil.

Our four congregations own and admit openly that the dynamics of racism influenced our beginnings and impacted the unfolding of our four histories. Racism led to barriers of separation among us for over a century. Now, in the

graced process of reconnecting our journeys, we fully embrace the dignity of each human person as revealed by the mystery of the Incarnation.

Therefore, we commit ourselves to the work of undoing racism. By participating in the process of creating right relationships, healing and reconciliation, we are determined to eradicate racism within ourselves, our congregations, our church, and our global community.

*Endorsed by Oblate IHM Board of Directors, September 30, 2006*

*...The Earth Charter*

Preamble to *The Earth Charter*

We stand at a critical moment in Earth's history, a time when humanity must choose its future. As the world becomes increasingly interdependent and fragile, the future at once holds great peril and great promise. To move forward we must recognize that in the midst of a magnificent diversity of culture and life forms we are one human family and one Earth community with a common destiny. We must join together to bring forth a sustainable global society founded on respect for nature, universal human rights, economic justice, and a future of peace. Towards this end, it is imperative that we, the peoples of Earth, declare our responsibility to one another, to the greater community of life, and to future generations.

The key principles of *The Earth Charter* are:

- Respect and care for the community of life
- Ecological integrity
- Social and economic justice
- Democracy, nonviolence, and peace

IHM sisters and associates endorse *The Earth Charter*.

- We will use *The Earth Charter* in the places we minister and live in ways that are appropriate given the situation.
- We will cooperate with others in working for the implementation of its principles.

*Approved as an IHM Corporate Stance April 15, 2004*

## **IHM MINISTRY/EMPLOYMENT POLICY**

IHM Sisters are members of an apostolic, religious congregation and are always engaged in ministry by active involvement or prayer. Members are expected to engage in active ministry according to their gifts, congregational goals and needs, professional qualities and health.

IHM Sisters are encouraged to discern their ministry with others in their Mission Unit or with colleagues as well as with their Mission Councilors. Changes in ministry should be discussed with the Mission Councilor in advance of the change.

Contracts are signed between the sister and her employer and not between the congregation and the employer. Employee policies of the hiring agency take effect once a sister is hired by the agency, school, parish or diocese. All human resource policies and guidelines of the agency, school, parish or diocese apply to the sister as an employee. Information on benefits should be clarified at the time of hire. Acceptance of resignation or dismissal of a sister from her ministry is the role of the employer.

Sisters are assumed to be in good standing in the congregation and letters may be written to this effect as needed by the Mission Councilor. This, as well as a background check, may be required when a sister is employed in the church or asked to do work with children in a parish or school. Sisters are encouraged and may be required to participate in the Protecting God's Children program of the Catholic Church.

### ***Ministry Commitment Form***

Members of the Congregation submit annually a Ministry Commitment Form. This action provides an opportunity for each person to deeply reflect on her responsibility for the life and mission of the Congregation. The completion of this form is significant also because it provides a place where the president, in the name of the Congregation, formally missions a sister to her ministry. This "approval of ministry," in turn, confirms one's tax-exempt status.

*Approved by IHM Leadership Council, July 20, 2010*

## **JUSTICE, PEACE AND SUSTAINABILITY SERVICES**

### ***Origination***

The Justice Task Force, called in 2000, recommended to the Coordinating Council the creation of the IHM Justice, Peace and Sustainability Office (JPSO) to promote, coordinate and deepen the IHM commitment to justice, peace and sustainability.

JPSO was created as a congregational service to work in advocacy, solidarity and education and to serve as a:

- Catalyst
- Clearinghouse
- Resource available for collaboration, facilitation and coordination of justice work, networking with others
- Public presence
- Voice of the Congregation on justice issues

Understandings shaping the statement of mission include:

- Justice is integral to IHM life and mission.

- Everyone does the work of justice in the IHM community.
- Our understanding continues to evolve and we continue to act out of those understandings.
- The work of justice is both particular and systemic.
- IHMs are part of a larger network addressing injustice.
- The work of justice is both denouncing injustice and announcing a culture of right relationship (i.e., kingdom)

### ***Committees and Projects Working for Justice, Peace and Sustainable Living***

#### *JPSO Advisory Committee*

The Advisory Committee was initiated to assist JPSO in its efforts to support and promote the congregation's commitment to social justice. The committee does this by proposing goals and screening priorities; advising JPSO on practices and processes that would facilitate engagement of the specific issues by the congregation; attempting to influence its public response and corporate impact; providing feedback on reports/calls to action to the Coordinating Council, Leadership Council and other groups within the congregation; evaluating the goals of JPSO and its staff; assisting and promoting the educational efforts of JPSO; and serving as a general sounding board for the JPSO staff.

#### *Issue-Focused Committees*

- AIDS Committee
- Earth Alive Committee
- Haiti Committee
- IHM Peacemakers
- Undoing Racism Committee
- Oblate Sisters of Providence/IHM Collaborations

#### *Oblate Sisters of Providence/IHM Haiti Project*

In 1995, the three IHM Communities began a common project of financial support for the Little Sisters of St. Therese in Haiti to assist with their ministries in education, health care, food, and sustainable development. The communities' common desire is to widen and connect the circles of involvement of sisters, associates/companions, families, co-workers, church members, and students with the people of Haiti.

#### *OSP/IHM Committee on Racial Healing*

The OSP/IHM Committee on Racial Healing commits itself to the work of undoing racism. By participating in the process of creating right relationships, healing and reconciliation, we are determined to eradicate racism within ourselves, our congregations, our church, and our global community.

- Responsible Investment Committee  
The Responsible Investment Committee (RIC) has existed since the late 1970s. It assists the congregation in ensuring that its financial decisions reflect the values and mission of the Congregation. The committee does this primarily through shareholder activity, monitoring the socially responsible investment guidelines and administering the alternative investment

fund. It also is involved in education and keeping abreast of how internal congregational purchasing decisions reflect IHM values. (See Section A2 on Responsible Investment)

- **Indiana/Michigan Justice Promoters**  
Justice promoters for religious communities in Michigan and Indiana met after the dissolution of the collaborative Groundwork for a Just World and before the U.S. went to war in Iraq in 2003. The group lobbies with Federal and State legislators; informs LCWR and CMSM leadership on advocacy issues; prepares election resources using Catholic social teaching; shares resources on the implications of 501(c)(3) status for work around elections, and circulates information opposing war and promoting fair and just immigration legislation.

### *Services*

- **JPSO Weekly Announcements**  
JPSO monitors the progress of bills and issues that reflect IHM values, and asks the IHM community to respond with one voice at pivotal moments when our political representatives are most likely to be influenced by our advocacy, when a bill is close to a mark-up, a hearing or a vote. JPSO briefs the IHM community on analysis not covered on network news or in local newspapers.
- **Web Resources**  
The Justice, Peace and Sustainability section on the IHM webpage takes its structure from The Earth Charter and its four key principles:
  - Ecological Integrity
  - Social Justice
  - Economic Justice
  - Democracy, Non-violence and Peace

Each section has its own individual page that includes a description of the issue, the IHM response, prayer materials, an annotated bibliography and recommended actions to take. An additional section, "Overarching Issues," provides a description of and resources on

- The Consistent Ethic of Life
  - The Universe Story
  - The Earth Charter
- *Armchair Activists* are urged to become informed and track one or two issues within these interrelated sections to build the voice for justice, peace and sustainability.
  - **Office Resources**  
JPSO maintains a variety of resources to supplement the community's work in justice, peace and sustainability. These resources are available on loan for use by individuals, IHM committees, Mission Units, ministry and/or other groups.
  - **JPSO Programming**  
The Justice, Peace and Sustainability Office organizes and conducts a variety of programs for youth and adults in the Archdiocese of Detroit, in the IHM Motherhouse and in the wider community. The goals of these programs are to educate IHM sisters, associates and allies;



to build partnerships; and to expand the mission for justice, peace and sustainability. The Motherhouse Campus serves as a living lab for sustainability. A Sustainability Education Tour program is being developed through a collaborative process among Campus Spirituality; St Mary Organic Farm; Justice, Peace and Sustainability; and the River Raisin Institute. Tour “add-on modules” will allow visitors to spend more time in an area of particular interest to them.

## **CONGREGATIONAL ENDORSEMENT PROCESS**

Requests for endorsements of position statements come frequently through the IHM Justice, Peace and Sustainability Office (JPSO). Some are ads to be taken out in major newspapers, others are letters to be directed to political and business leaders, still others are statements on web sites whose organizations work for a particular issue. Some have extended or indefinite deadlines and others may be looking for a 24-hour turnaround.

### ***Process***

1. JPSO receives solicitations for endorsements (or may actively seek position statements to endorse if a topic is timely and has a particular claim on the community).
2. If the credibility of the sponsoring organization is sound and the statement is consistent with IHM documents, JPSO will make a decision
  - to decline;
  - to endorse in the name of the IHM Justice, Peace and Sustainability Office;
  - to endorse in the name of the Leadership Council of the Sisters, Servants of the Immaculate Heart of Mary of Monroe, Michigan;
  - to recommend endorsement in the name of the Leadership Council pending their approval
3. JPSO may decline to endorse for a variety of reasons, such as finding the tone of the statement not consistent with the IHM public face, redundancy or late deadline.
4. If it is clear that the IHM community and its mission will benefit if a statement is endorsed, JPSO will make a determination about the most appropriate signatory (e.g., JPSO, Leadership Council or a particular office within the leadership).
5. A statement may be selected as a Leadership Council endorsement if the sponsoring organization is seeking religious leaders to endorse or if it is clear that other religious leaders have signed or will be signing. Some statements are declined as Leadership Council endorsements because they do not seem to match the weight of the office.
6. If a statement seems appropriate for endorsement by the Leadership Council, and if it is obviously in relation among other Congregational positions, JPSO will endorse in the name of the Leadership Council and send a notification to the leadership liaison to JPSO who notifies the rest of the Leadership Council. The notification includes the subject of the endorsement, the date, the sponsoring organization, the action taken by JPSO in the name of the Leadership Council, background on the issue/action, rationale for endorsing, and a copy of the document endorsed. If there is the slightest doubt about unanimous

endorsement by the Leadership Council, we will not presume to endorse.

7. If a particular statement seems appropriate to endorse but we question whether the members of the Leadership Council will themselves choose to endorse it, we will draw up a recommendation to endorse that includes the same information that we prepare for a notification: the subject of the endorsement, the date, the sponsoring organization, the action recommended for the Leadership Council, background on the issue/action, rationale for endorsing, and a copy of the document to consider endorsing. We send the recommendation to the leadership liaison to JPSO. If the Leadership Council chooses to endorse, JPSO will handle the logistics.
8. If a statement seems appropriate for endorsement by JPSO, we will simply make the endorsement.
9. Statements generated or endorsed through JPSO are prepared for archival storage. A list of all statements or the statements endorsed in the name of the Leadership Council is prepared twice a year for Coordinating Council meetings and meetings with the Advisory Committee to the Justice, Peace and Sustainability Office.

*Approved by IHM Leadership Council, September 21, 2010*

### ***Public Stances or Statements***

When any IHM department or individual takes a public stance on an issue, the door is open for public reaction to the IHM congregation. Reaction can come in the form of threatening or nuisance phone calls and e-mails, unwelcome visits to the Motherhouse, letters to the editor of any print or online news source, etc.

To ensure the congregation is prepared to respond to any kind of public reaction, it is the IHM community's policy that no public stances be taken by an individual in the name of the Congregation.

A process is in place for the Leadership Council to act on behalf of themselves and/or the congregation. Endorsements are carefully screened by the Justice, Peace and Sustainability Office to see that the organization is sound and the statement is consistent with IHM directions and documents.

JPSO will copy the Communications Office on all endorsements. The Communications Office will review the public stance and, if necessary, identify any advanced steps that need to be taken prior to any expected response to the stance. Such steps might include

- writing a script for telephone receptionists and alerting the Campus Administrator;
- identifying a spokesperson to respond to reactions from the public;
- providing the spokesperson's name and phone number to the Communications Office and to all reception desks;
- notifying Security to be alert for uninvited guests responding to public stances;
- writing a statement to respond to any anticipated questions or reactions.

## **CIVIL DISOBEDIENCE PROCESS**

### *History*

A growing number of people in the United States have found themselves called to express their concern for justice and peace through a stance of tax resistance and/or acts of nonviolent civil disobedience in places as varied as military installations, munitions companies, the South African Embassy and churches offering sanctuary, and other moral issues. Since IHM sisters have taken their place with others in these actions, and since the Chapter of 1982 spoke to the issue, the Governing Board felt it important to reflect upon the issues and questions surrounding the whole area of civil disobedience. At the June 1984 meeting, they spent time in prayer and discussion and surfaced their own feelings, questions and concerns. They then asked sisters who had actually participated in civil disobedience to share some written reflections on their experiences. In March 1985, a Working Paper on Civil Disobedience was sent to the Congregation by the Governing Board for prayer and discussion. What follows is an affirmation of those reflections from the Governing Board (Central Administration and Provincials) in 1992.

### *Definition*

Civil disobedience (a refusal to obey governmental commands, especially as a non-violent means of gaining concessions from that government) is the choice by an individual to obey one's conscience or inner law rather than to obey the law of the state. It is an ancient and honored tradition in Christianity and a valid choice for those individuals who find themselves called to take strong action against grave injustices. It is also something which entails very serious consequences, great risk and, in some cases, physical danger. For these reasons, civil disobedience must not be entered into lightly, nor without genuine prayer and honest discernment.

In the minds of many non-violent resisters, there is a distinction between civil disobedience and civil resistance.

### *The Distinction As Some See It*

Civil disobedience is an action which involved **BREAKING** an unjust law for the purpose of changing that law. Gandhi, Martin Luther King, and Rosa Parks are three people who stand out in this tradition. For example, Rosa broke an unjust law. She refused to sit in the back of the bus. She was arrested for breaking that unjust law and eventually that law was changed.

Civil resistance is an action which involves **UPHOLDING** laws which government is breaking/ violating.

### *Discernment Process*

Prayer calls us to honesty, to trust, to the genuine desire to do God's will in each instance. Thus we are called to live discerning lives. Discernment is an essential component of the decision to do civil disobedience/resistance. Discernment enables us to clarify the issues, examine possible ramifications, and discover one's own readiness for active participation in a particular action. The process of discernment is multifaceted and involves many communities,

all of whom will be in some way affected by a sister's action: those with whom she will act, her local community, those with/for whom she ministers and, often, her own family. The Mission Councilor is also involved in the discernment. The President of the Congregation is kept informed. Of necessity, there is a creative tension between an individual member's conscience and her responsibilities to the Congregation with whom she has cast her life and the Congregation's responsibility to her. There are many questions that arise in such a process. Some of the major ones are:

- Why am I doing this; what is my motivation?
- Are there other ways to achieve this goal?
- How is this action a gospel action? Will it remain a non-violent act? What purpose will it serve?
- What are the ramifications for me personally (e.g., arrest, physical danger, misunderstanding from others)?
- What are the ramifications for:
  - the Congregation (e.g., adverse effects on other congregational actions/stances, legal considerations, financial responsibility);
  - those with/for whom I minister (e.g., loss of my services, necessity of explaining my actions to others)?
- Who will support me in my action? How will I give and receive hope?

### *Pledge of Support*

Civil disobedience is obviously not for everyone. It is, however, a call of God's spirit for some. As leadership of the Congregation, we pledge our support, our questions and our prayer to those among us who feel so called. We call ourselves and all members of the Congregation to study the issues involved and to reflect upon the witness to peace and to justice in our own lives.

### *References*

1. Referral of General Chapter 1982 to the interactive forum approved in Proposal 138: "As a Chapter body we affirm and support members who feel in conscience called to engage in an act of non-violent civil disobedience in the pursuit of justice. We endorse the discernment process which Congregational leaders and these individual members have used to determine this course of action..."
2. Quinonez, Lora Ann, VDP, "Obedience and Disobedience." *Civil Disobedience: An Old Voice in a New Age*, R. Hofbauer, Ed. (1984: Washington, D.C., LCWR Publications), p. 1.  
*Central Administration and Provincials, May 1992*

## **MINISTRY GRANTS AND MINISTRY GRANT BOARD**

Ministry Grants are provided for in the annual operations budget. Funds are drawn from the Ministry Fund. The Ministry Grants are administered by a Ministry Grant Board appointed by

the Leadership Council. It has a broad base composition.

The *IHM Constitutions* and the guidelines below influence decision-making in the granting of funds. Priority consideration will be given to ministries which:

- Collaborate to change structures of injustice rather than to give short-term assistance;
- Facilitate the empowerment of the poor and the marginalized, especially women.

### ***Guidelines***

1. A grant is defined as a contribution to an organization in which an IHM Sister is involved.
2. In the awarding of grants, preference will be given:
  - to those unable to obtain sufficient support through other means;
  - to those who give evidence of an effort to obtain funding from other sources;
  - to requests for seed money for new and innovative ministries;
  - for needs not being met by other groups
  - to ministries which give evidence of collaboration with IHMs and others;
  - to ministries that have reasonable potential for continuity and support beyond the period of the IHM grant;
3. Grants are awarded on a one-year basis for a maximum of three consecutive years. Following the three years, there is a three-year waiting period before an application can be submitted for the same institution.
4. No more than 30% of the grant may be applied to administrative costs.
5. Accountability is maintained through completion of an SSIHM Ministry Grant Report Form.

*Approved by Central Administration, February 1991*

## **CONGREGATIONAL CONTRIBUTIONS**

Throughout its history, the Congregation has committed a portion of its funds to respond to requests for contributions from various groups.

... as a community we commit ourselves to live a simple life style, to share what we have with those in need and to use our resources in action on behalf of justice.

*IHM Constitutions, Article 22*

In Assembly '72, we stated as a Congregation:

At this time communal discernment directs us to channel the resources of our Congregation through our various works toward the eradication of the causes and forms of injustice and oppression and toward the creation and promotion of structures which will correct inequities in society and disunity among people...

### ***Criteria for Congregational Contributions***

In light of the above, contributions are given in the name of the Congregation according to the following ordered priorities:

1. Aid is aimed at systemic change. Larger contributions will go to groups working for change at the national level and to those whose effectiveness in networking for alternatives is apparent or especially promising.
2. Aid is consonant with the Congregation's priorities as expressed in the Constitutions, and the actions of Chapters and Assemblies.
3. Aid is directed toward the self-help of the oppressed. Contributions to the beginnings of groups organizing for empowerment of the poor and marginalized are given priority.
4. Aid favors groups overlooked by the very situation in which they are and groups with little access to other sources of funding.
5. Contributions are given to groups where there is a valid tradition of support and/or where protocol dictates that it is prudent.
6. Contributions are given for simple almsgiving in cases of:
  - natural disaster or economic hardship;
  - particular vulnerability of certain groups within an oppressive situation in which action for change is in process, e.g., the elderly or children in a country torn by a war of liberation.
7. Priority is given to groups in areas in which members of the Congregation are currently ministering or where we have some history of ministry.

Periodic reports on the contributions given will be made to the Congregation.

### ***Current Practice for Congregational Contributions***

The IHM Congregation donates a specified amount determined by the Leadership Council each year to organizations and other allies as a way of extending the mission of the Congregation. The IHM Justice, Peace and Sustainability Office makes recommendations for annual donations to the Leadership Council. These recommendations are based on the priorities of the IHM Congregation as articulated by: congregational documents; the work of the congregational committees; past or current IHM affiliations with the organizations; recommendations of the JPSO Advisory Committee; and the work of the Indiana/Michigan Justice Promoters and LCWR.

Community priorities include social justice, economic/worker justice, ecological integrity, Haiti, HIV/AIDS, peace and global solidarity, Catholic multi-focus organizations, local/Detroit, legislative action, and media literacy.

The process, as stated below, for recommending donations has built-in checks and balances for each annual schedule.

- JPSO researches the websites of potential recipients.
- The JPSO Advisory Committee reviews the recommendations.
- The Leadership Council approves the donation schedule.

## **RESPONSIBLE INVESTMENT**

### ***Philosophy***

Every person is made in the image of God and redeemed by Christ. This essential value and dignity entitles each person the inherent right to the means (material and spiritual) necessary for human life.

The Sisters, Servants of the Immaculate Heart of Mary of Monroe, Michigan, in our commitment to an incarnational attitude of stewardship seek to use our resources in ways which express justice and charity. In the words of our *Constitutions*:

In our struggle to live the gospel today,  
we recognize our call  
to serve the needs of Gods people  
not only through the traditional works of mercy,  
but also by working with others  
to eradicate the causes of injustice and oppression and  
to help create structures that will promote justice and peace  
and bring unity among all peoples.

*Article 11*

In the handling of our corporate investments, we will seek  
to reflect consistently the justice concerns which we express  
as a congregation, and to consider where responsible shareowner  
activity can be taken by us and/or in collaboration with other  
groups.

*Article S-45*

As a Congregation which holds our material resources in common, we seek to exercise responsible stewardship of our financial investments in accord with the Bishops' Pastoral – *Economic Justice For All* which asserts shareholders must see to it that the invested funds are used responsibly:

As part owners, they must cooperate in shaping the policies of those companies through dialogue with management, through votes at corporate meetings, through the introduction of resolutions, and through participation in investment decisions.

We also praise efforts to develop alternative investment policies, especially those which support enterprises that promote economic development in depressed communities and which help the church respond to local and regional needs. When the decision to divest seems unavoidable it should be done after prudent examination and with a clear explanation of the motives.

*Article 354*

In its commitment to act as a socially-responsible investor, the Community is motivated and inspired by the words of its founder, Louis Florent Gillet:

I began without thinking of the future of the work, leaving it to God alone to bless and make it prosper if it were pleasing to God and useful for the good of others.

*IHM Constitutions, Article 16*

### ***IHM Socially Responsible Investments Guidelines***

The Responsible Investment Committee reviews and modifies the socially responsible guidelines that the congregation's portfolio managers use in determining which stocks to buy. After each Chapter, the RIC reviews its work and the guidelines to determine the need for modification. The guidelines incorporate both those sectors in which the RIC encourages and discourages. The SSIHM Corporation Board utilizes these guidelines when they meet with the financial managers. Socially responsible investing yields the same or higher rates of return as regular investing.

Since the early 1970's the Congregation has directed its portfolio managers to support companies which promote the principles of peace and justice in our world. Today the congregation is also committed to promoting sustainability of the whole Earth community.

Therefore, we will actively seek investments which support:

1. Producing goods and services demonstrably beneficial to the health and welfare of people, which do not have external environmental or ancillary health and welfare costs or adverse consequences.
2. Control of pollution by utilizing clean renewable forms of energy or companies which show a demonstrable record and commitment to reducing their toxin emissions, volume of waste stream and overall environmental footprint.
3. Reducing animal tests to the minimum humane level possible.
4. Non-discriminatory hiring and promotion procedures, enactment of policies encouraging minority-owned businesses, affirmative action and comparable worth practices for minorities and women.
5. Representation of women and minorities on Boards of Directors.
6. Promotion of health issues with regard to pharmaceuticals with attention to supporting the availability of generic drugs and alternative medicine.
7. Companies which show a good faith commitment to factor in the needs of local communities wherever they do business.

We will avoid investments that violate the Earth community in the following important arenas:

1. Energy: The company must not have more than 5% involvement in the production of nuclear energy nor engage in environmentally destructive practices, such as, but not limited to, mountain top mining.
2. Military Production and Violence in Society: The company must not promote the growth of militarism nor produce nuclear or conventional weapons or key parts thereof. We will not invest in companies that produce violent video games.
3. Consumer Protection: We will not invest in companies that derive 10% or more of their revenues from tobacco products for human consumption. We will not invest in companies selling products known to be hazardous to human health or the environment, even when



properly used.

4. Environment: We will not invest in companies whose operations further endanger the ecological balance of nature or threaten the continued supply of natural resources or contribute to species extinction. We will not invest in companies which have a long term pattern of improper disposal of hazardous waste or regulatory actions against their toxic emissions of any type, or in companies with unsustainable or destructive land use practices in their production activities.
5. Employment: We will not invest in any companies with significant patterns of discriminatory employment practices as measured by regulatory actions or long term patterns of discrimination-related controversies, such as sexual harassment.
6. Foreign Investments: We will not invest in any companies without proven controls to prevent illegal conduct including human rights violations, severe environmental violations, bribery and money laundering.
7. Dignity in the Work Place: We will not invest in any companies that violate federal regulations and laws regarding safe working conditions and a healthy work environment. Companies that engage in human trafficking or child labor practices will not be considered for investment.
8. Business Practice: We will not invest in any companies that engage in anti-trust practices or consumer fraud or deceptive marketing.
9. Agriculture: We will not invest in any companies that operate Concentrated Animal Feeding Operations (CAFO) or produce and distribute genetically-modified seeds.

### ***Implementation of the Socially Responsible Guidelines***

The Responsible Investment Committee and the financial administrators of the congregation are expected to keep abreast of the literature on corporate social responsibility so that the above guidelines can be observed. This is done through participation in

- Interfaith Coalition for Corporate Responsibility (ICCR);
- Conference on Corporate Responsibility of Indiana and Michigan (CCRIM); and
- various newsletters which monitor corporate activity.

The Responsible Investment Committee collaborates with the Justice, Peace and Sustainability Office in educating the public around corporate campaigns.

The Responsible Investment Committee initiates stockholder resolutions and actions to alert the public about corporate activities which go counter to the guidelines. In some cases stock may be held in corporations for the specific purpose of taking part in such activities.

The Responsible Investment Committee votes the proxies of the stock held in the congregation's portfolio. Voting is done in the light of the justice stands of the congregation and in accord with the actions being taken by member groups of the Interfaith Coalition on Corporate Responsibility (ICCR).

After reviewing requests in the light of the Criteria for Alternative Investments, the Responsible Investment Committee recommends alternative investments to the SSIHM Corporation Board.

All activity of the Responsible Investment Committee is carried on in accordance with the Working Rules for the Committee. The Committee is accountable to the SSIHM Corporation Board to which it makes recommendations.

The SSIHM Treasurer and the Director of Financial Services communicate regularly with the Congregation's investment managers and are responsible to monitor the implementation of the IHM Socially Responsible Investment Guidelines.

*Approved by SSIHM Corporation Board, December 1986  
Revised and approved by SSIHM Corporation Board, November 5, 1998  
Revised and approved by SSIHM Corporation Board, June 28, 2006  
Revised and approved by SSIHM Corporation Board, November 21, 2011*

### ***Alternative Investments***

The alternative investment movement is a natural outgrowth of the movement for socially responsible investment. The attitudes that motivate alternative investments contrast dramatically with the mainstream values of the world: possession, exploitation, and profit.

Socially responsible investment prompts us to place our resources at the service of the economically poor in a new way. We pledge that we will help create and support opportunities whereby the poor can become authors of their own destiny. Participation, local control, more equal distribution of God's gifts, and care for Earth are primary values of alternative investment.

#### *Criteria*

1. The project addresses structural change by focusing on the root causes of injustice and by being socially innovative in its nature.
2. The project involves the people affected by it in the decision-making process and provides for opportunity for self-determination.
3. The project operates in some areas where IHMs have historical ministerial ties or are currently ministering, or have indicated some priorities.
4. The project has a well-developed funding strategy within which we participate because this kind of investment is one not generally made by other types of investors. Projects where our funds can leverage others will be given priority.
5. The project gives evidence of financial responsibility and stability. Linkages with the Industrial Cooperative Association, National Federation of Community Development Credit Unions, and other organizations providing technical assistance are such evidence.
6. The project shows evidence of being able to repay the loan within a reasonable amount of time so that it can be recycled to other groups.
7. The project ordinarily aims at benefiting a large number of people rather than a few individuals.
8. The project's operations are non-military, non-nuclear, non-discriminatory, and non-exploitative of Earth's resources.

#### *Operational Policies*

1. The investments will be made in the form of loans with interest rates varying according to

the proposal received, available funds and current market interest rates.

2. Proposals for projects recommended by Industrial Cooperative Association, National Federation of Community Development Credit Unions, or other similar groups will be given priority because of their greater prospects of success.
3. Some funds may be invested in intermediaries which fund alternative investments such as ICA, South Shore Bank, and the Ecumenical Development Cooperative Society.
4. Preference is give to projects that operate in areas where IHMs have historical ministerial ties, or are currently ministering, or have indicated some priorities.
5. The Responsible Investment Committee will determine the allocation of alternative loan money to the various groups. They will keep the Leadership Council informed of their work throughout the year.
6. The amount of \$500,000 is established as the revolving loan fund for alternative investments.

*Approved by SSIHM Corporation Board, October 1993  
Revised and approved by SSIHM Corporation Board  
July 1, 1997; February 9, 1999*

#### *Alternative Investment Fund Proposal by Responsible Investment Committee*

The recommendation is to keep the Alternative Investment Revolving Loan Fund at a reduced level so that it remains sustainable and continues as an extension of the IHM mission and its commitment to share its financial resources with the economically poor.

The Fund would be maintained at a range of \$350,000 - \$500,000, with periodic re-evaluation.

#### *Implications of this change:*

For our commitment to care for our elders by addressing our financial situation.

1. After the Fund is at \$500,000, the yearly renewal of loans and the interest payments will be determined in conversation between the SSIHM Corporation Board and the Responsible Investment Committee evaluating the needs of the congregation to determine if the fund should continue to decrease toward its lower level.
2. Investments, upon maturity, could be considered for liquidation by the Responsible Investment Committee, according to evaluation criteria. The RIC would make such recommendations to the SSIHM Corporation Board.

For our commitment to share our financial resources with the economically poor and in a way that affects systemic change.

1. A loan fund needs to be somewhat substantial to respond to the average request which is in the range of \$15,000 - \$50,000, keeping a fund at \$350,000 - \$500,000 provides an adequate base to respond to these needs.
2. Retaining a fixed amount separate from the yearly budget process is consistent with the Community of Goods recommendation.
3. Retaining the Fund honors our long-standing commitment to economic empowerment as a critical way to address the needs of the poor and to effect systemic change.

4. Retaining the Fund in this way is sustainable and allows us to serve these needs even after we can no longer minister among the poor ourselves.

*Accepted by IHM Corporation Board, April 26, 2006*

**IHM ALTERNATIVE INVESTMENT FUND REQUEST**

**Date:**

**Name of Organization:**

**Complete Address:**

**Telephone:**

**Fax:**

**E-mail:**

**Contact Person:**

**Position**

**Chair of the Board:**

**Organization's total assets per your most recent financial statement:**

**Total funds required for the project:**

**Amount requested from the Alternative Investment Fund:**

**Interest Rate:**

**Term:**

**What funds would be used to pay the interest payments and to repay the loan?**

**Collateral available:**

**Brief description of your organization / project:**

**How would the loan be used?**

**Time frame on when the money would be needed:**

**How the organization incorporates economic justice into their work**

**Ways in which the work of the organization encompasses IHM values**

**Signature and title of an officer in the organization:**

**Note: Please attach a copy of the organization's current financial statements**

## **ARCHIVES**

### **ACCESS**

The Archives exists to preserve the official records of the Congregation.

All official records of the Congregation (including minutes, documents, correspondence) shall be preserved in the Archives of the Congregation.

*IHM Constitutions, S-37*

In addition to the official records, the Archives personnel collect material pertinent to the members of the Congregation and their ministries as well as historical material relevant to the Congregation itself.

The Archives is a non-circulating, closed-stack research facility. The primary use of the collection is to serve persons in congregational administration and the members of the Congregation. Persons doing scholarly research are welcome to use the resources of the Archives, subject to established procedures and restrictions.

A sincere effort is made to apply the principles of equal access, the right to know, and confidentiality. The preference is to make materials available for qualified researchers, but donor restrictions are honored, and respect for confidentiality sometimes demands restrictions.

Applying the above-stated principles to the holdings of Archives establishes three types of access: open, restricted, and closed. An open collection is available to qualified researchers without restrictions. A restricted collection is subject to certain regulations. The restriction may apply to the whole or only a portion of the collection. It may be a time restriction based on sensitivity to a current situation or to living persons. It may limit who has access and may state the purpose for which the collections may be used, e.g., for statistical analysis only. A closed collection is not open to researchers.

### **USE OF THE COLLECTION**

The Archives is a collection of documents and materials relating to the life and mission of the Congregation. All IHM sisters and other authorized persons are welcome to use the Archives.

Use of the collection is subject to certain rules which are guidelines for reasonable care of the records. Researchers must be aware of their responsibility for manuscripts as unique and valuable items to be preserved for future generations.

#### *Application for Research*

Persons seeking access to Archives materials are requested to fill out a form stating the purpose of their visit, the records they wish to consult, and their willingness to abide by the Archives policies.

### *Care of Manuscripts*

All materials must be handled with care. Avoid writing on or placing anything on top of a manuscript. Notes may be taken with pencil, ballpoint pen, audio and computer. Indelible pencils, ink and fountain pens, or liquids of any kind may not be used on a table with documents. Do not mark, erase, fold, trace, attach post-it-notes or in any way damage materials. Smoking is prohibited in and near the Archives area.

### *Providing Documents*

It is necessary that the researcher confer with the archivist regarding materials. Every effort will be made to provide pertinent, available documents.

### *Restricted Materials*

The use of restricted materials is subject to the limitations imposed by the restrictions of the donor or depositor, or by archival policy.

### *Copying Materials*

Copying is a service to expedite research and lessen wear on documents. It is permitted with the understanding that the materials are for private study or research and will not be further reproduced or made available to another person without the written permission of the archivist. The reader should identify the material to be copied on a Copy Request Form. For a nominal fee, the documents will be reproduced.

Taking digital photographs or videos of materials or scanning them with a personal scanner requires permission of the archivist.

In some instances, it may be necessary to refuse or limit the amount of copying due to circumstances, e.g., the physical condition of the material, limited staff time, special restrictions of the donor, or copyright laws. For unpublished material, the archivist may require that copies be returned to the Archives at a specified time. The researcher should be informed of this obligation prior to accepting the copies.

### *Permission to Publish and Copyright*

Permission to publish any archival material in its entirety or a substantial portion thereof should be requested in writing prior to publication. When permission is given, the Archives still retains its own right to print the manuscript and to grant permission to others to print it. The Archives personnel assume no responsibility for infringement of copyright. Knowledge of the common law rights in literary property, the laws of libel, and the securing of permission to publish material is the responsibility of the user.

### *Acknowledgement*

The author should acknowledge the source of all manuscripts and other records found in the Archives and used in publications, thesis or dissertation. The official identification of the Archives is:

Sisters, Servants of the Immaculate Heart of Mary Archives  
Monroe, Michigan 48162

The suggested abbreviation is SSIHM, Monroe, Michigan.



*Audio-Visual Materials*

The Archives has a collection of cassettes, CDs, slides, pictures, videos, DVDs and photographs. Persons wishing to use this material should consult with a member of the Archives staff. In some instances, this material may circulate.

*Research by Appointment*

Persons who wish to do research in the Archives or who are seeking information should put their requests in writing. Address letters to:

The Archivist, SSIHM Archives  
610 W. Elm Avenue  
Monroe, MI 48162-7909  
Or telephone: 734-240-9695

The Archives personnel would appreciate receiving at the time of publication a complimentary copy of all works which refer to materials in the SSIHM Archives.

## CHRONICLES

### WHAT ARE CHRONICLES?

Chronicles are a record of the life and ministry of the members of the Congregation, written by the members themselves. In her chronicles, each IHM records significant information (persons, accomplishments, dates, events, etc.) about her life and ministry. Hopefully the chronicles also express feelings and capture the spirit of an experience.

#### *New policy regarding chronicles*

As of July 1, 2000, each individual IHM is responsible to write her own chronicles and to send them to the Archives. Each member now has her own chronicle file in the Archives.

#### *Change from institutional to individual chronicles*

Individual chronicles now replace institutional chronicles, except for the Motherhouse Community. Even if two or three IHMs live together and work for the same school or parish, each one must write and send in her own chronicles.

#### *Why the change?*

For more than 100 years, all IHM chronicles were the record of a particular institution (convent and school). For example, year by year, they recorded IHM life and ministry at Holy Redeemer, Detroit or at St. Michael, Flint.

However, after Vatican II, as IHMs moved into a great variety of ministries, chronicles took two forms. Some are/were the historical record of a group; others tell/told about the life and ministry of an individual. Even in instances where IHMs lived together in a house, apartment, or convent, some members sent their individual chronicles because their ministry is/was different from that of the other members of the group.

As a result, the Archives staff began filing chronicles in two ways: (1) chronicles from a traditional IHM institution (school/convent) continued to be filed as they had been; and (2) each IHM who sent her own individual chronicles was given a special file.

At the present time, because of the great diversity of ministries and living arrangements, individual chronicles, rather than group/institutional chronicles, preserve our history better.

### EXCEPTIONS

Motherhouse chronicles will continue to be filed as they have always been filed; i.e., with Motherhouse Chronicles: 1845-present. If an individual Sister in the MRC/HCC sends her individual chronicles, they will be put in her file.

*Specific IHM Ministries* Information about an institution to which the Congregation has a specific commitment (e.g., Marygrove College, Marian High School, St. Mary Catholic Central,

Visitation North, River House, etc.) will continue to be filed with the chronicles/records of that institution. Examples of such information would be: Board minutes, the yearbook, history of the institution, significant newspaper articles, an outstanding award. The IHM Leadership Council member who directly relates to an IHM institution is responsible to collect such information and deposit it in the Archives at the end of her term, together with the other materials from her office.

## **IMPORTANCE OF CHRONICLES**

Chronicles are one of the principal sources of information about the history of the Congregation (e.g., *No Greater Service, Achievement of a Century; Building Sisterhood*).

In addition, each individual IHM's story is important. Without chronicles, her part in the larger IHM story is lost.

### *What should be included in the chronicles?*

Chronicles should record significant information about the life and ministry (or ministries) of an IHM over a particular period of time (usually one year – July 1 to June 30).

- *Living arrangements*: where an IHM is/was living; with whom (if a group); significant persons, dates, groups, events, etc.; anything about the living arrangements that might be important or of interest. (Please identify persons by their full name. If a religious other than an IHM, please identify her congregation.)
- *Ministries*: where an IHM is/was working; a description of her ministry or ministries; something about the school, parish, or agency; significant persons, dates, groups, programs, events, etc.; anything that might be important or of interest.
- *Miscellaneous*: copies of an award, special program, or an article about the IHM from a parish bulletin or newspaper.

### *Some hints about writing chronicles*

Chronicles do not have to be long. There is no official form for chronicles. The (one, two, three or more pages of) chronicles may be written as a simple narrative or in a way that highlights important information or events as a chronological record.

Chronicles need not be a day-to-day diary of life and ministry. They should record important information and significant events. Share your feelings about your ministry, about events. Tell the human story. This makes history come alive.

For filing and preservation, please use 8½" x 11" white paper (bond or laser, if possible). Type or write. Indicate the year or years covered (e.g., July 1, 2009-June 30, 2010 – or July 1, 2006-June 30, 2010).

## **LIBRARY AND RESOURCE CENTER**

### **MISSION**

The Library/Resource Center reflects its history in the ongoing formation of the congregation's members. Consonant with this commitment to lifelong learning and the congregation's commitment to social analysis, theological reflection, environmental care and creative futurizing, the holdings reflect IHM priorities in mission and ministry as well as current trends in religious and civil society.

### *Holdings*

The permanent collection of 30,000 books has, at its heart, 10,000 volumes in the areas of theology, spirituality, Church history and world religions. In addition to basic academic fields, the collection includes works of art, drama and literature as well as contemporary fiction.

- Current periodicals and newspapers number about 100.
- The Reading Room houses the extensive paperback collection and large print books.
- The AV Room contains a wide selection of audio books, music CDs and DVDs for both entertainment and education.
- The Computer Room provides nine stations for internet research.

### *Services*

Professional staff serves clients on a daily basis. The schedule of hours is available at the Library desk at 734-240-9678.

Individual research and computer training sessions are arranged as needed.

Library privileges are held by IHM members, associates, residents, volunteers and staff members. The Library also serves the Monroe Vicariate and the local community. Annual subscriptions are available for long-term use of the Library resources.

### Contact

IHM Library/Resource Center  
610 W. Elm Avenue  
Monroe, Michigan 48162-7909  
Director: 734-240-9713 or Desk: 734-240-9678

FREQUENTLY ASKED QUESTIONS AND ANSWERS: POLICIES, PROCEDURES  
AND PROCESSES

*Sisters, Servants of the Immaculate Heart of Mary, 610 West Elm Avenue, Monroe, Michigan 48162*

*Revised and approved by the IHM Leadership Council October 2013*

*Edited and produced by Monica Tyliniski*



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FREQUENTLY ASKED QUESTIONS  
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SISTERS, SERVANTS OF THE IMMACULATE  
HEART OF MARY

MONROE, MICHIGAN, U.S.A

## SECTION B. RELATIONSHIPS

# RELATIONSHIPS

## INTRODUCTION TO RELATIONSHIPS

We, the members of the Monroe IHM Congregation, call ourselves to re-vision our understanding of the IHM Community, beginning with discussion on our charism and mission. We believe that various forms and modes of community relationship which sustain and enrich our lives flow to and from the charism and mission.

We acknowledge the tension we experience concerning forms of membership and honor it as an impetus for study and growth. We will discern and encourage emerging forms of community relationship while respecting the distinctions among them.

*Chapter 2005-2006 Directions*

We the vowed members of the IHM congregation, come together with our associates to advance the liberating mission of Jesus.

We recognize, appreciate and celebrate both our unity and distinctiveness.

Guided by the Holy Spirit, we en flesh the IHM charism and continue to explore new ways of entering into relationship with associates and colleagues.

For the sake of this mission, we commit ourselves to seek out, and enter into dialogue with women who are discerning a call to religious life.

*From Hearts Afire Process 2007-2009*

*Articulated by IHM Coordinating Council, November 2009*



## **JOINING IHM**

### **FORMATION FOR VOWED LIFE**

#### ***Formation Vision***

To new members, called to share our life and mission, we offer our love, our support, and all that we are and have. We are grateful for the unique enrichment we receive from each of them.

They will best understand who we are by entering into our life:

- of faith and prayer,
- of zeal for the extension of God's reign,
- of true love for one another.

*IHM Constitutions, Article 29*

The above quotation with its three-fold goal embraces the very essence of the life of every IHM sister even as it gives inspiration and perspective to the entire Formation Program. Its invitation to new members is as timeless as it is timely: deep prayer, service to a waiting world and love for one another.

In these times, the Formation Program moves ahead, conscious of the relationships which exist:

- between openness to our world and fidelity to our specific calling;
- between creating a future and continuing to be rooted in our traditions;
- between professional preparation in ministerial skills and personal integration of a spirituality which blends the essential elements of our heritage and living out the gospel in our times.

Community, ministry, spirituality are the three basic areas of formation. These basic elements must always be seen in the light of a healthy tension, seeking a balance between a rootedness in our own heritage as the IHM Congregation and an openness to our reality as members of the people of God in these our times. Both openness and rootedness are fundamental to the three areas of formation.

#### ***Basic Areas of Formation***

##### ***Community***

Formation in community must take place within the context of the wider community of the people of God, who both affirm us and challenge us. With them we share the search for God's will in our world, our first community. Within this context, however, the IHM community life must also be learned and experienced. Those who seek to join us in our more specific living out of the Christian disciple's call to community will have opportunities to learn of our charism, tradition and heritage and to experience them as they are lived out among us today. This

experience will normally include some time of residence in or near Monroe, where the first roots were planted, where in 1845 the vision of us and our outreach to the world began.

### *Ministry*

Education is the groundwork for all ministry. A broad background in theology, the liberal arts, and social sciences insures professional preparation. More immediate preparation stresses the study of our own IHM history and various methods of prayer with the emphasis on the prayer life of our patrons, Saint Teresa of Avila and Saint Alphonsus Liguori.

Ministerial formation also implies deepening awareness of the imperative to justice, the development of a global earth community perspective and of the skills of social analysis. In preparation for ministry, new members will have some experience of the many ways in which IHM Sisters serve. They will spend some time also being with and learning from the poor, who have so much to teach us.

### *Spirituality*

Formation in spirituality serves to integrate all facets of one's experience. The formation will enable one to listen to God's word as it speaks today – in the scriptures and in the voices of God's people and the groaning of all creation. A formation in spirituality must be global in its perspective, thus catholic and ecclesial in the truest sense. Based in prayer and always incorporating reflection upon what takes place in our lives, formation remains true to our heritage as IHMs while it looks to new ways of contemplation and new expressions of the call of God in our lives as women, as ministers in this millennium.

Because every vision strains to look beyond the immediate and refuses to be static, so the present vision of the IHM Formation Program in community-wide dialogue will continue to expand, adapt, reach out toward the future, even as it remains faithful to the three basic areas: community, ministry, and spirituality.

### ***Initial Formation Program***

Initial formation is a time of mutual discernment during which the individual and the congregation seek to determine a person's desire and capacity for life in this Congregation. The formation period should lead toward a free, conscious, and well-informed decision regarding the individual's vocation.

This period of formation emphasizes personal development of an apostolic spirituality rooted within our heritage. Such spirituality challenges each individual to nurture and integrate the following:

- a commitment to Jesus Christ and his redeeming mission;
- a commitment to participate in that mission through ministry;
- a commitment to communal living and the vowed life;
- a commitment to prayer, worship, and on-going reflection.

The Formation Program has four distinct but interrelated phases: pre-admission, candidacy, novitiate, temporary profession.

*IHM Constitutions, Chapter 3, Articles 29-30; Chapter 9, Articles 111-120;  
Formation S40-S43; Appendix 643.1-655*

## ***Formation Program***

### *Pre-admissions: Inquiry-Application Phase*

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Pre-admissions is a process of clarifying with an individual her motivation for seeking religious life, a realistic awareness of contemporary life, and the degree of her personal maturing and openness to growth.

*IHM Constitutions, S-40*

#### *Purpose*

A period of inquiry is provided for women who are seeking to clarify their life direction and who are considering religious life as one of several possible choices. It seeks to assist women who may be at different points in their search for vocation clarity. Some are searching for clarity about whether or not they are called to religious life. Some feel fairly certain they are called to religious life but are searching for clarity about whether or not they are being called to life in the IHM Congregation. Still others may feel they are called to IHM life, but for various reasons wish to have time and opportunity for further experience, prayer, and personal growth before and while applying for admission.

#### *Design*

The inquirer/applicant is provided with opportunities to meet women of the IHM Congregation up close; opportunities to share the search with other women who have similar goals; and to engage in spiritual direction and vocational counseling.

The Congregation is provided with opportunities to meet the inquirer/applicant personally; among family relationships, professional life, Church involvement, and prayer life.

#### *Meeting the IHM Congregation*

A woman who wishes to participate in this program contacts the pre-admissions coordinator who will introduce her to current opportunities to formalize relationships with the IHM Congregation and serve as a link for meeting others in the joining process:

- invitations to share community prayer, meals, and community activities with various groups in the IHM Congregation;
- invitations to become acquainted with the life of ministry of women in the Congregation by visiting IHM women in their ministerial settings;
- an opportunity to visit Monroe when possible;
- opportunities to share questions, concerns, and life experience.

#### *Sharing the Search*

The Pre-Admissions Program offers a variety of opportunities to meet and share with other women exploring similar goals and questions. These opportunities may include invitations to participate in collaborative discernment experiences planned with other congregations, as well as invitations to share with women in the IHM Congregation in more informal ways.

#### *Spiritual Direction*

The pre-admissions coordinator requests the woman to have a spiritual director. This

relationship challenges her to articulate her personal religious experience, to come to know more clearly her personal strengths and weaknesses and ultimately rewards her with a clearer awareness of ways in which God is calling her within her life experience.

### *Vocational Counseling*

From time to time, each woman in this phase, is invited to meet with the pre-admissions coordinator and share her search on an individual basis. These conversations serve as opportunities for the person to articulate her deepened awareness of herself, of where God is acting in her life, and of her growing sense of the IHM Congregation as she continues to gather new experience. It is hoped that these conversations will foster as well the skills of reflecting on life experiences as a primary source of God's invitation to her.

### *Clarity of God's Call*

Until acceptance as a candidate, the inquirer/applicant makes no formal commitment to enter religious life. Rather, she invests herself in a process of spiritual direction, vocational counseling, personal growth, and sharing with others, in order to discover the particular way in which God is calling her to life. As she grows in clarity and conviction about God's activity in her life, she may desire to request admission to the IHM Congregation, or she may decide to end her participation in the program. The main goal of pre-admissions is to assist her in arriving at a clearer discovery of the basic direction God is calling her to design and shape her life.

### *Candidacy*

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Candidacy is a period of introduction into all aspects of the Congregation's life and mission. Its focus, however, is the transition into community living and the gradual learnings of those attitudes and skills appropriate to common life: common prayer, faith-sharing, interdependence, participation in decision-making, and mutual accountability.

*IHM Constitutions, Article 115*

During this time, ordinarily from one to two years, the candidate is invited to continue her own journey in faith, experience new personal relationships in the IHM Congregation, and experience a deeper relationship with God. Candidacy continues the process of affective growth, a deepening prayer life, experience of the charism of the Congregation, and the delicate task of discovering whether or not she is called to the IHM life of dedication and service.

Because the major areas of all IHM life are community, ministry, and spirituality, the program stresses these focal points and is designed to help the candidate experience some of the practical dimensions of life as an IHM sister while simultaneously supporting herself, often by continuing her professional career/work life.

### *Community*

During candidacy, the major emphasis is on community. Wherever possible, the candidate enters into the IHM community life, prays with the sisters, works with them toward common goals, and assumes her share of responsibility in IHM living situations. Not only does the candidate come to know a local community of IHM sisters, but she is also introduced to the larger community as a participating member in congregational gatherings, as well as inter-community meetings.

### *Ministry*

The candidate continues to minister part and/or full-time in some appropriate field, depending on her specific professional competence. She engages in theological studies as grounding for her ministry. She has the opportunity to serve and learn from the poor and continue her awareness of social justice issues and social analysis.

### *Spirituality*

Through prayer and reflection, the candidate develops a deepening relationship with Jesus and a growing desire to discern God's will in her life. She acquires a growing awareness of her values, needs, strengths and limitations. She meets regularly with the coordinator of candidates and a spiritual director as she works on her individual goals.

### *Individual Plan for Candidacy*

The candidate and coordinator develop a mutual plan, with observable goals, for gradual integration into all facets of congregational life. The candidate has independent personal assets and liabilities and begins, gradually, a process towards holding all things in common.

### *Novitiate*

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The novitiate is a time of deepening one's participation in the life of the Congregation. It provides time for intense prayer and study and is devoted to discerning whether the individual has the various gifts of the Spirit required for living religious life in this particular Congregation.

*IHM Constitutions, Article 118*

If the candidacy is an introduction and overview of the life of an IHM sister, the period of the novitiate is an intense period of living, a more serious proximate preparation for life as a vowed member of the Congregation. It is a quiet period of waiting, reflection, and evaluation both on the part of the Congregation and the novice to discover whether or not she is suited for life in the community.

### *Atmosphere (especially during the canonical year)*

- One conducive to a deepening of one's own relationship with God in prayer and reflection on experience. Daily prayer and regular spiritual guidance is consistent throughout the novitiate.
- One where the novice can experience solitude (physical, psychological and spiritual) and learn how to make it fruitful in her life.
- One of a withdrawal from direct ministry. Ministerial experience does have a place in order to maintain the rhythm of apostolic life, reflection/action/reflection, but it is not the main focus.
- One conducive to growing in knowledge and experience of the Congregation. Theological study is given priority.
- 

### *Community*

The novice experiences formation in community by living with a group in commitment and

presence. Here she is involved in building and sustaining a faith community, which includes trust-building, shared decision making, mutual accountability, interdependence and living a simple lifestyle. The novice assumes responsibility for various levels of community living through community prayer and sharing, community meetings, house budgeting, meal preparation, house maintenance and use of leisure time. She becomes actively involved with the larger IHM community by participating in area and congregational gatherings. By giving service at the Motherhouse, she learns from the wisdom and experience of the older members of the IHM Congregation. Community life is experienced with members of other communities through her involvement in the Inter-Novitiate Formation Program. The novice engages in limited ministry in a local parish or place for social service so that formation in community also takes place within the context of the wider community of the people of God.

### *Ministry*

As a preparation for ministry, the novice will further her theological education through individual and group study/reflection/discussion. This will be enhanced by courses related to inter-community formation programs and by reflection on experience. She learns to value IHM history and heritage through study of community history, Alphonsian spirituality and Teresian prayer. Through attendance at congregational gatherings and ministry at the Motherhouse, she benefits from the lived experience of the members. The novice has the opportunity to test the gospel imperative to justice by learning skills of social analysis and pastoral theological reflection. She puts these skills to use through some ministry with persons who are poor or marginalized.

### *Spirituality*

Basic to spirituality is the ability to reflect on life experience and to integrate faith with life. The canonical year places special emphasis on spiritual formation through personal and communal prayer, spiritual reading, spiritual direction and participation in the liturgical life of the Church. Through study of the contemporary theology of religious life, the vows, *IHM Constitutions* and the social teaching of the Church, she will be better prepared for vowed commitment in the IHM Congregation. During this time, the novice will acquire a deepening awareness of herself -- her values, needs, strengths and limitations -- so she can whole-heartedly be of service to others. Her apostolic spirituality is grounded in a growing awareness of the global reality, especially how this affects the lives of those who are poor.

### *Individual Process*

Prior to beginning the novitiate and frequently throughout the two years, the novice meets with the novice director as well as with her mentors to establish and evaluate individual goals which will enable her to best internalize the content of the novitiate.

### *Mentors*

The novice, in consultation with the novice director, chooses five IHMs who will mentor her during her novitiate. She suggests women whom she respects and doesn't know well, but would like to know. She and her novice director meet with them regularly and they become a source of support and a group to whom she can ask questions and receive insights about their experiences of IHM vowed life.

### *Second Year of Novitiate*

The second year novitiate offers the novice the opportunity to deepen her commitment to God through community, ministry and spirituality. Emphasis is given to continued theological study, prayer, spiritual direction, human growth and development and apostolic/global spirituality. She may be involved in ministry during this time. If she is in ministry, it should be ministry that enhances the goals of the second year of novitiate. Study and preparation for vows is central to this year. Discernment leading to profession is the culmination of her initial formation.

### *Temporary Profession*

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The period of temporary profession is a time of transition into the mainstream of congregational life. Its focus is the integration of prayer, ministry, and community living.

The length of time in temporary vows is three years, with the possibility of renewal for another three years.

*IHM Constitutions, Articles 127-128*

### *Community*

During this period, the major emphasis is on integration of community, ministry and spirituality. The sister in temporary profession continues to live in a community of faith, accepting responsibility to help enable the quality of its ongoing life and mission. The authenticity of her own vocation is affirmed through developing relationships and feedback from the persons with whom she lives and with those in the broader community.

To facilitate the sister's process of entering the mainstream of life within the Congregation, each sister under temporary vows relates regularly to both her mission councilor and to an IHM-appointed mentor that the temporary professed sister assists in selecting.

She relates to a mission councilor in the manner of other congregational members in discernment of:

- housing,
- finances,
- education,
- participating in a mission unit,
- major decisions which affect her life in the Congregation,
- ministry.

At the same time, she relates regularly to an appointed IHM mentor for the purpose of:

- integrating the psycho-spiritual experience of transition from the life of the novitiate to the experience of life in the Congregation;
- providing for a continuity of formation, education, and relationships, and especially for the deepening of the reflective process of her life.

### *Ministry/Spirituality*

A sister who has made vows dedicates herself to God and to a life based on the gospels, and

she lives that commitment as a member of the IHM Congregation in relation to the Church and the world.

She actively assumes the responsibilities of membership in the Congregation and responsibilities of ministry. Her major task of ongoing formation is to grow more deeply in reflection, articulation and clarification of her life experience. Depending on her own academic background, she engages in ministry and/or continues her education. It is understood that she continues the ongoing study of theology and continues with spiritual direction.

During the entire time of vows, each sister is challenged to see that personal growth, growth in a sense of justice and mission, growth in love for the Congregation and a deep global spirituality are life-long endeavors. Final commitment is not the signal that this growth is entirely accomplished. Rather, the responsibility for continual integration of each of these facets of her life is a serious one and belongs to her alone. The responsibility of the Congregation is to challenge and support her lovingly in this process.

### ***Entrance Policy and Procedures***

One who seeks admission to the congregation presents herself to the pre-admissions coordinator. After a period of mutual discernment, the person may be offered an application which, upon completion, will be reviewed by the Admissions Board.

Approval for any step toward vowed membership is given by the president with her council, as indicated in the Constitutions.

### ***Requirements for Admission to Candidacy***

1. Roman Catholic, at least, three years.
2. Physical and psychological examinations indicating excellent health.
3. College degree, or equivalent, from an accredited university.
4. Normally the age of an entrant is 25-45 years old.
5. If in a recovery program, evidence of growth in recovery is required.
6. If divorced, a document of Annulment is required.
7. If widowed, three years of adjustment are required.
8. If a mother, children must be physically and financially independent.
9. No outstanding debt except that of student loans.
10. U.S. citizenship or legal U.S. residency
11. Criminal background check required.

### ***Procedure for Entrance into Candidacy***

With the guidance of the pre-admissions coordinator, and after sufficient discernment, the following steps are taken in the process of applying for Candidacy.

1. In addition to the requirements above, the inquirer completes the application, autobiography, provides names and addresses for letters of recommendation, submits health history forms, education transcripts, sacramental records. She also arranges for



- a psychological exam and background check.
2. The Admissions Board is convened to review the application, interview the applicant and formulate a recommendation to the president.
3. Approval for any step toward vowed membership is given by the president with her council, as indicated in the Constitutions. The president sends a letter of acceptance to the candidate and a copy of the letter is sent to the pre-admissions coordinator.

*Procedure for Entrance into the Novitiate*

With the guidance of the candidacy coordinator, the following steps should be addressed in the process of candidacy to novitiate:

1. The candidate writes a personal reflection paper on her discernment of her call to religious life, her experience of IHM community, and her experience of prayer.
2. The candidate shares this reflection with the candidacy coordinator.
3. The candidate enters into a personal discernment with her spiritual director and with those who have been working closely with her during the period of candidacy.
4. The candidate requests letters of recommendation from IHMs with whom she has ministered, with whom she has lived, with those who have interacted with her significantly during candidacy. These letters are sent to the candidacy coordinator.
5. At least four months before profession the candidate writes to the IHM President requesting admission into the novitiate. She includes her personal reflection paper (as indicated in first point above.)
6. In light of her experience with the candidate, the letters she has received, and the reflection and shared discernment, the candidacy coordinator sends her written formal recommendation to the president.
7. The candidate meets with the president to discuss her readiness for the novitiate.
8. The president makes the decision and communicates that decision to the candidacy coordinator.
9. The president communicates the official decision in writing to the candidate. A copy of the letter is sent to the candidacy coordinator.
10. The candidate coordinator, along with the candidate, plans the novitiate reception ceremony and, there, publicly witnesses to the readiness of the candidate who is received by the whole community. At the ceremony the novice formally receives her copy of the IHM Constitutions and the IHM pin from the President of the congregation. The candidate director will work with the Communications Office to produce a news release.
11. The novice director receives the transcripts and sacramental records from the Candidate's file and maintains the file during the novitiate.

*Procedure for First Profession*

With the guidance of the novice director, the following steps should be addressed in the process of movement toward first profession.

1. The novice makes a personal discernment with her spiritual director.
2. The novice makes discernment with her novice director.

3. The novice requests recommendations from those significant to her joining process as well as from the sisters with whom she has lived during novitiate.
4. Normally six months in advance of profession, the novice makes a formal request in writing to the president.
5. The president meets with the novice to discuss her readiness for vowed life.
6. The novice director makes a formal recommendation in writing to the president.
7. The president takes her personal recommendation, the novice's request, and the recommendations of the director and other significant IHMs to the Leadership Council for consent.
8. The president sends a letter indicating the decision to the novice. A copy of this letter is sent to the novice director.
9. The novice director obtains the following legal forms which the novice signs before the Ceremony of Profession:
  - Last Will and Testament
  - Cession of Administration at Time of First Profession,
  - Agreement of Sisters Under Vows.
  - Durable Power of Attorney for Health Matters; and for Financial Affairs
10. The novice and her director plan the appropriate vow ceremony during which the director witnesses, publicly, to the readiness of the novice. The president receives her vows and presents her with an IHM ring. The novice director works with the Communications Office to put out a news release.

### *Procedure for Renewal of Vows*

With the guidance of the appointed IHM mentor, the following steps should be addressed in a request for renewal of vows:

1. The sister in first vows makes a personal discernment.
2. The sister discerns with the appointed IHM to whom she relates and with her mission councilor.
3. The sister makes her request in writing to the president.
4. The president meets with the sister about three months before desired renewal date.
5. The sister obtains recommendations from those IHMs and others who have been significant to her years of first profession.
6. The appointed IHM mentor and mission councilor make their respective recommendations in writing to the president.
7. The president takes the sister's request and the recommendations of the mission councilor and appointed IHM mentor to the Leadership Council for consultation.
8. The president sends a letter to the sister indicating the decision. Copies are sent to the mentor and the mission councilor.
9. The president sets the date in consultation with the sister, the mission councilor, and the mentor.
10. The sister, in consultation with her mission councilor and her mentor, plan a simple ceremony.

### *Procedure for Final Vows*

With the guidance of the appointed IHM mentor, the following steps will be taken prior to final vows:

1. The sister discerns with her spiritual director.
2. The sister discerns with her mission councilor and her mentor.
3. The sister makes her request in writing to the president.
4. The sister obtains letters of recommendations from those significant to her since first profession.
5. The mission councilor makes her recommendation in writing to the president.
6. The appointed IHM mentor makes her recommendation to the president.
7. The president meets with the sister at least six months before the desired profession date to discuss the sister's readiness for final vows.
8. About three months before the desired profession date, the president takes the sister's request and the recommendations to the Leadership Council for consultation.
9. The president sends a letter to the sister indicating the decision. Copies of this letter are also sent to the mission councilor and the mentor.
10. The sister, her mission councilor and mentor plan an appropriate ceremony and witness to her readiness for final vows. The mentor takes responsibility to work with the Communications Office put out a press release. The Mission Council and staff will assist.

### *Financial Policies during Initial Formation*

#### *Candidacy*

The candidate is expected to contribute to her financial support. The amount of her contribution and the Congregation's contribution to her support will be worked out and mutually agreed upon by the candidate director and the candidate. She will administer her own financial affairs in consultation with the director of candidates and in accord with the congregational policies. Her earnings are taxable and she and her employer must pay Social Security taxes as they do for any other employee who is not under religious vows. It is more likely today than in the past that a pre-candidate who wishes to apply for candidacy may have outstanding debts from educational loans. In this case, the potential candidate's situation will be individually considered.

#### *Novitiate*

The novice is totally supported by the Congregation for the canonical year. If during the second year of the novitiate she is engaged in some ministry, any earnings in excess of her support will be reserved in an escrow account until she makes vows or leaves the Congregation. Her earnings are taxable and the novice and her employer must pay Social Security taxes as they do for any other employee who is not under religious vows.

Any extraordinary expenses for medical care, education, or other needs will be funded by the Congregation during the novitiate without expectation of reimbursement, should the novice not profess vows in the Congregation.

The novice will assign the administration of any personal property she may have to another

person during her novitiate so that she will experience the common life as it is lived by religious under vows. These arrangements will be approved by the director of novices.

At the time of entrance into the novitiate, the novice will sign the Agreement Form, which indicates that she will not claim any recompense for services rendered during the novitiate period should she not profess vows in the Congregation.

### ***Initial Formation Records***

1. All information regarding potential candidates, candidates, novices, and those in the transfer or re-entry process will be kept on file in the Membership Office.
2. At the time a person enters the Congregation (candidate, transfer, re-entry), the general secretary should receive an entrance form. The prompt reception of this form is important to the general secretary because of her responsibility to keep accurate statistics on membership. The specific date of entry is very important.
3. When a sister changes status, e.g., moves from candidate to novice, the date of this change should be given to the general secretary and to the archivist.
4. If a person terminates her relationship with the Congregation, a brief statement of the final understanding should be included in her record. Her file is given to the general secretary, who in turn retires the record to the Archives. The confidential portion of the personal file should be in a sealed envelope and marked "Confidential" by the respective director.
5. When a novice makes vows, her record should indicate the transfer of accountability to a mission councilor. Her file is sent to the general secretary. Any material that is confidential should be so marked. The mission councilor receives the material indicated in the congregational policy regarding sisters' files. At this time, the education records should be sent to the IHM Education secretary.
6. The documents signed at the time of vows are given to the general secretary.
7. It is advisable for the formation personnel to keep a record on all persons formally applying, entering, or leaving the Formation Program, stating the reason, date, and location of their files. This record is to remain in the Membership Office for reference.

## **ASSOCIATE PROGRAM**

### ***Overview***

Established in 1977 in response to requests from both inside and outside the Congregation, the IHM associate reality invites persons into a formalized relationship with the IHM community based on shared values and a recognized desire for mutual enrichment. By its very nature, it expands the options for connection with the Congregation beyond vowed membership and opens up possibilities for exploring Christian partnership among a more broadly based community of persons.

Having learned from the experience and desires of those who have chosen to journey with us, the associate relationship has been refined to include three areas of association: prayer, community and ministry. While not mutually exclusive, these categories permit associates to clarify for themselves and for the Congregation the primary focus of their involvement. The specifics of each associate relationship are expressed through an individualized covenant of commitment.

Both the birth and the development of IHM associates is rooted in the experience of 21st century life. The rising consciousness of interdependence on personal and global levels, the restructuring of religious communities and re-identification of religious experience, the awakening of an adult spirituality among Christian laity, the need for conscious bonding in a world of increasing fluidity and alienation . . . these and many other factors are a part of the world reality out of which the associate movement has grown and to which it responds.

At heart, the associates are recognized as the gift of God's creative spirit among us. The insights and decisions to which their gifts will draw us personally and communally will become clear only as we evolve together into the future.

### ***Policies***

Since the inception of the IHM associate reality in 1972, and since the commitments of associates, which began in 1977, associates have been recognized by the Congregation as an outpouring of the Spirit among us. Great care has been taken to respond to the Spirit's lead and not to block the Spirit's creative work. These policies and guidelines are offered in the hope of assisting rather than stifling the development of associate relationships within the Congregation. Their intent, then, is to articulate our present reality without limiting our evolving vision.

1. IHM associate commitment establishes the context for a formalized, non-vowed relationship between an individual and the IHM Congregation.
2. The intent of this associate relationship is to provide an experience of mutuality: the associate offers to the Congregation a pledge of ongoing support, a shared commitment to faith and gospel living, and the investment of personal time and talent. Together with ongoing mutual support, the Congregation offers to the associate the opportunity to deepen prayer life, to strengthen the bonds of friendship, and/or to share opportunities for ministry.

3. Associate relationship is formalized through an individualized covenant and is established for a specified period of time, normally one to five years. The end of this time period signals the opportunity for mutual review of experience and the possible renewal of commitment of one to five years.
4. A period of orientation, normally at least nine months, precedes associate commitment. During this time, the applicant is able to develop a deeper understanding of the IHM Congregation, to explore mutually enriching relationships, and to clarify expectations and desires. Request for application to IHM association is made to the associate coordinator. During the orientation process, the applicant is assisted by an IHM companion.
5. Many former members of the IHM Congregation have been welcomed as associates. However, in respect for mutual freedom and to ensure clarification of relationships, former members of the Congregation are not eligible for the associate experience until two years after leaving the Congregation.
6. Each IHM associate is asked to choose one or more of the following three focuses of her/his involvement with the Congregation.

*Prayer Association is the identification with the IHM charism of prayer through a bond of prayerful interdependence with the Congregation.*

Prayer association establishes a reciprocal commitment to prayer: the associate praying for and with the Congregation, the Congregation praying for and with the associate. This relationship supports spiritual growth and enrichment for both and offers to the associate increased opportunities, if desired, for growth in spirituality, shared prayer experiences and communication with specific prayer intentions. The possible development of a “prayer partnership” with a retired or infirm sister is a treasured part of prayer association which requires a mutual commitment to prayer but does not necessitate frequent presence at community gatherings. While prayer associates are a welcome sight at the Motherhouse or local houses, this form of association is possible with less physical interaction. Much effective spiritual dialogue can happen by phone or mail, and it is the bond of prayer which holds us together.

*Community Association is the identification with the IHM charism of communal life through shared life experience.*

Community association focuses on interpersonal interaction within the framework of Christian companionship. By establishing concrete bonds of friendship and shared activity, it seeks to provide for all involved a deepened experience of supportive community to which we are all called by the Gospel.

A community associate normally makes a commitment to share ongoing social interaction with a local IHM house or mission unit. In addition, she/he is supported by periodic meetings among the associates themselves and is welcomed as a participant in IHM gatherings. Shared experiences through volunteer service with or among IHMs is also available for those who desire. It is the open acceptance of one another as disciples of Jesus which enlivens and sustains the community association.

This form of association requires a commitment to some physical presence, participation and solidarity, according to the individualized covenant of each associate. The mutuality of sharing, while requiring an investment of time and energy, bears fruit in

the enriched Christian lives of all involved.

*Ministry Association is the identification with the IHM charism of extending the redemptive mission of Jesus through collaboration in ministry.*

For some, the ministry form of association implies working alongside IHMs in a specific service commitment. For others, it means a bonding with IHMs who share ministry in another geographical location. For all, it seeks to provide a deepened experience of support and collaboration as we strive to share our ministries in the redeeming mission of Christ.

Ministry associates enter into an active relationship of support and sharing with their IHM ministry partners. Opportunity for exchanging resources, discussing concerns, and/or combining gifts and expertise provides a mutually enriching base for sustaining ministry involvement. For some, the possibility of shared living opens a further door towards supportive bonding.

Ministry association requires a serious commitment of time and active involvement in some form of public Christian ministry. Normally, it is chosen by persons already actively engaged in ministry who desire to give and receive support through IHM association. The fruits of the ministry association experience include a mutual recognition of expanded scope and effectiveness beyond what any one of us could achieve alone.

7. Associates and vowed members of the Congregation mutually enrich one another. However, because associates are not members of the IHM Congregation, in either ecclesial or civil law, they do not hold the rights and responsibilities or the financial obligations and benefits of the members of the Congregation. Associates remain responsible for their own financial support.
8. The Congregation frequently welcomes associates into participation in assemblies and representational groups (mission units, etc.), where their involvement in discussion can contribute significantly to the shaping of IHM attitudes and decisions. By the nature of their non-vowed commitment to the Congregation, associates do not have formal voting privileges and do not serve as official representatives to governmental structures within the Congregation. They are welcome to submit proposals to governmental structures in conjunction with IHMs as co-sponsors of a proposal.

One associate is elected by the associate members to act as the Associate Representative to the Coordinating Council. That individual, while not a voting member and not a representative for all associates in the same sense that a Mission Unit representative represents her Mission Unit, shares in all of the discussions and helps keep alive an awareness of the vitality and importance of the associate presence within the community.

Associates play an active part in the on-going life of the Congregation. Their participation in IHM meetings, their involvement in committee work, and their presence and support in good times and bad are treasured assets to the Congregation. In the same way, members of the Congregation seek to stand beside their associates in the unfolding realities of their lives. A spirit of openness and sharing on the part of all

encourages mutually beneficial relationships as together we seek to respond to the call of God.

*Approved by SSIHM Congregational Governing Board, November 1986*

### ***Process for becoming an Associate***

Each associate is a gift of the Spirit to the IHM Congregation as our bonding together (partnership) in the mission of Jesus (discipleship) creates the fruits of mutual enrichment and benefit. The mission of Jesus benefits as our partnering together impacts more lives with the Spirit's presence (gospel values, peacemaking efforts, personal growth). We touch the future in terms of perpetuating the charism of the IHM Congregation by encouraging each person to be a compassionate, healing, liberating presence in the world of today.

#### ***Process***

The formal process of involvement as an IHM associate proceeds in four stages:

#### ***Application Process***

- Completion of application form.
- Gathering of letters of reference. (The applicant provides names; coordinator sends request for reference)
- Interview between applicant and associate coordinator.

#### ***Orientation Process***

- Selection of IHM companion on the journey.
- Reflection and sharing based on Orientation Journal.
- Involvement in IHM experiences to develop/deepen IHM relationships.
- Periodic gatherings with associate coordinator and other associates.

#### ***Formalization of Commitment***

- Shared discernment with associate coordinator regarding readiness.
- Development of desired Associate Covenant.
- Affirmation of intent by member of IHM Leadership Council who oversees Relationships.
- Signing of covenant and celebration of commitment.

#### ***Ongoing Association***

- According to IHM congregational guidelines and specification of Associate Covenant, periodic reflection/review with possibility for commitment renewal.

Some specific questions often asked regarding the IHM association are answered here.

- The Associate Covenant is individualized normally meaning that each person's commitment expresses her or his own interests/desires for a mutually enriching relationship with the Congregation.



- The length of commitment for new associates is normally one to three years. Associates renewing their contracts can choose a span of one to five years for their commitment time. For a lifetime commitment, see the “Policy for IHM Associate Life-Long Commitment.”
- The orientation process, while individualized, normally takes at least nine months. There is no desire to rush into commitments, but rather to appreciate and flow with the Spirit’s own timing.

### ***IHM Companion for Associate Candidacy***

A companion for an associate candidate is one who shares the spiritual journey of the candidate-associate with the IHM Congregation. Once begun, the initial relationship between the IHM companion and the associate candidate is a special one. The companion, especially during the journal experience, meets regularly with the candidate to explore such topics as the life, history and work of the Congregation, prayer, call and community, and to respond to the questions the candidate might have. The companion:

- is usually a vowed member of the Congregation;
- is knowledgeable or willing to learn about the IHM associate reality, history, procedures and policies;
- manifests an enthusiasm for the associate presence within the IHM community;
- reflects and shares on the Orientation Journal with the candidate;
- maintains communication with the coordinator;
- keeps contact with the associate candidate by means of correspondence, personal visits, and phone calls and is willing to share opportunities for personal growth with the candidate, e.g., community celebrations, days of renewal, special speakers, etc.;
- acquaints the associate candidate with the Motherhouse;
- invites mission units to extend invitations to the associate for group meetings, prayer and celebrations;
- participates with the coordinator in the review of the relationship between the candidate and the companion as well as between the candidate and the Congregation;
- discusses with the candidate and the coordinator the terms of the individual’s covenant;
- participates in and witnesses the covenant celebration of the candidate;
- encourages the new associate to develop many relationships within the IHM community while remaining in some contact with the new associate after the orientation phase is completed.

### ***Policy for IHM Associate Life-Long Commitment***

That IHM Associates have the option of making a life-long commitment.

*Approved by IHM Coordinating Council, November 2011*

After nearly 30 years of the Associate Program, the IHM community has developed a strong relationship with these associates within the congregation and the intent is only to have this relationship grow and deepen.

### *Eligibility*

An associate is eligible to pursue a life-long commitment when she/he:

1. has been an associate for at least six (6) years; and
2. has shown by her/his active involvement in the type of commitment she/he chose, i.e. prayer, ministry and/or community, that they are living the IHM values, such as:
  - Joining a mission unit, any of various committees, connecting with a local house, with someone in overseas mission.
  - Becoming a ministry partner, connecting with other IHMs in similar ministries, with IHMs in various peace and justice groups, volunteering at Motherhouse.
  - Forming a prayer partnership with someone in the Health Care Center or confined to their home; joining in prayer opportunities at River House; attending wakes/funerals of deceased Sisters and Associates, etc.
  - Attending IHM celebrations for Jubilee, Associate Covenants ceremonies, and other IHM social and/or fundraising gatherings, whenever possible.
3. desires to make her/his commitment as an associate permanent, thus establishing a life-long relationship with the IHM Sisters.

In this covenant, the Associate offers the congregation a pledge of life-long support and the congregation offers the same.

### *Process for Making a Life-long Commitment*

1. An individual associate wishing to make a life-long commitment makes an appointment with the Coordinator of Associates to discuss her/his desires.
2. She/he will complete a request form expressing their desires and the reasons they qualify as shown above.
3. The individual will obtain a written endorsement from the respective mission unit or two other sources as appropriate based on their experiences.
4. The written request and endorsements will be taken to the Leadership Council for approval.
5. The associate will prepare a prayer service at which they will make their commitment as an associate life-long, in the presence of a member of the Leadership Council.

### *Goals*

- Each IHM Associate is asked to continue involvement with one of the three programs: prayer, community and /or ministry to stay involved with the congregation.
- Each Associate will play an active part in the ongoing life of the congregation through participation in IHM meetings, involvement in committee work, presence and support in good times and bad.
- Each year the Associates will be asked to complete a commitment form expressing their activities.

## **TRANSFER PROGRAM**

To new members, called to share our life and mission, we offer our love, our support, and all that we are and have. We are grateful for the unique enrichment we receive from each of them.

Transfers will best understand who we are by entering into our life

- a life of faith and prayer
- of zeal for the extension of God's reign
- of true love for one another.

*IHM Constitutions, Article 29*

The Transfer Program is designed for women religious from other canonical Congregations who are interested in becoming more familiar with the IHM charism in order to discern the possibility of a call to transfer to the IHM Congregation.

The Transfer Program includes three phases: the application process, the acceptance process and the orientation process. A detailed explanation of each of these is given on the following pages.

### *Priority:*

It is important for the sister applicant to have the opportunity to grasp a true and complete picture of the Monroe IHM Congregation in its:

- mission and spirit,
- spirituality,
- diverse ministries and lifestyles,
- community living patterns,
- current structures and chapter directions,
- roots and lived history.

### *Policy*

The Congregation of the Sisters, Servants of the Immaculate Heart of Mary, Monroe, Michigan may receive as members those women who have professed final vows in another religious Congregation providing the applicants fulfill canonical and IHM congregational requirements.

### *Transfer Program Processes*

#### *Application Process*

1. The initial request is made by the sister applicant to the person responsible for incorporation for vowed membership, i.e. the admissions coordinator.
2. The sister applicant is interviewed individually by the president and the admissions coordinator.

3. The admissions coordinator assigns an IHM contact person.
4. Spiritual direction is required during the entire process. Counseling may also be advised.
5. The sister applicant and the admissions coordinator schedule times for communication and consultation.

### *Acceptance Process*

Normally, after one year of communication with the membership coordinator the sister applicant, with the approval of the director, may request acceptance into the Transfer Program.

1. The sister applicant submits to the president a written request for acceptance into the program.
2. The IHM contact person sends a written evaluation of the sister applicant to the membership coordinator. The contact person shares her evaluation with the sister applicant.
3. The membership coordinator submits her written recommendation to the president.
4. The applicant submits the following to the membership coordinator:
  - a. autobiography with recent photo,
  - b. education records,
  - c. work/ministry resume,
  - d. copies of sacrament records,
  - e. letter of consent from the superior general of her former congregation,
  - f. copies of recent health records:
    - physical examination report with history of medications and surgeries,
    - complete dental report,
  - g. psychological inventory and interview report (completed within the last two years),
  - h. criminal background check report
  - i. reference letters from the following:
    - two persons with whom applicant has worked within the last five years,
    - two persons of the applicant's choice.
5. The sister applicant has interviews with:
  - the president,
  - all members of the Leadership Council,
  - two IHMs designated by the admissions coordinator.
6. The decision regarding the initial admission of the sister applicant is made by the president with the consent of the Leadership Council. The president communicates the decision in writing to both the applicant and the major superior of the sister's community.

### *Orientation Process*

After the applicant has been formally accepted into the Transfer Program, she relates to and is accountable to the director of transfers (normally a member of the Leadership Council). The role of director of transfers may be filled by an individual, assisted by a reflection group, to facilitate the transfer process. This part of the process will last a minimum of three years and may last a maximum of five years.

The sister transfer's relationship with the director of transfers should be one of mutual openness and trust. At their regularly scheduled conferences, the applicant will reflect with the director on the major experiences of her life and the ongoing experiences of becoming more acquainted with the IHM Congregation.

The sister transfer is expected to have a spiritual director who will assist in the growth experiences of this time. Confidentiality is respected in these relationships.

The sister transfer continues to relate to her contact person as long as the director of transfers, the contact person and the sister transfer feel the formal relationship should continue.

Counseling may be required or strongly recommended during this transition time.

Ordinarily, the sister transfer will live in the Monroe/Detroit area with at least one IHM sister. She will minister in an area for which she has been prepared. The director of transfers will meet with the sisters with whom the sister transfer will be living and explain the process as well as the involvement desired of her residential community.

### *Program*

The program will accommodate the needs of the individual sister transfer. Basic components for all sister transfers are:

- IHM history and charism,
- IHM spirituality,
- *IHM Constitutions*,
- retreat opportunities,
- workshops for personal growth,
- attendance at all area and congregational assemblies and meetings.

During the time of her orientation, the sister transfer participates in two or three different mission units. This will give her a broader view of the Congregation and help her to understand the diversity of IHM membership. During her last year of orientation, she may choose one mission unit with whom she feels ready to join as a member.

### *Finances*

Ordinarily, the sister transfer will earn her living expenses through her ministry. The local budget will serve as a guide for the sister transfer's budget. The director of transfers approves the sister transfer's budget at the beginning of each fiscal year.

Any earnings or gifts beyond the approved local budget are placed in an escrow account in the Congregational Business Office.

The sister transfer is guided by the *Financial Policies during Transfer Program*.

### *Expectations of IHM Community Life*

1. A faith community involved in the life of the Congregation whose source of life together and

- service of others is centered in the person and gospel of Jesus Christ;
2. A community in which the person experiences interdependence;
  3. An expressed willingness by the community (reflection group) to:
    - accept the sister applicant as a full member of their community,
    - work as a community for the growth of each member by formulating yearly goals for their group and evaluating these goals periodically,
    - facilitate honesty and openness within their group,
    - facilitate spiritual growth of the individuals and the group by sharing prayer, days of reflection, liturgies, and
    - participate in the evaluations of their experience as a group and as individuals as they journey with her in their community.

#### *Expectations of the Sister Applicant*

1. Communicate regularly with the director of transfers regarding needs, interests and experiences as she becomes more acquainted with the Congregation;
2. Have a willingness and openness to learn from community experiences;
3. Participate as fully as possible in IHM community life both on the local and the congregational levels;
4. Work toward a realistic balance in her life: prayer, ministry, leisure, study and recreation;
5. Participate in periodic evaluations of her adjustment to IHM community life with her local community and the director of transfers.

Throughout the process of discerning her call to transfer to the IHM Congregation, the *IHM Constitutions* are the backdrop for her regular meetings with her spiritual director and the director of transfers.

#### *Transfer of Vows*

When the sister transfer and those participating in her process of orientation feel she is prepared to enter the Monroe IHM Congregation as a full member, the sister follows the procedure for the transfer of vows.

#### *Procedure for Transfer of Vows to the IHM Congregation*

1. After at least three years in the IHM Congregation, the sister transfer presents her written request to transfer her perpetual vows to this congregation to its president.
2. The director of transfers writes her recommendation to the president.
3. The sister's local community (reflection group) and other persons agreed upon by the sister transfer and the director send recommendations to the president.
4. The president takes the recommendations and the sister's request to the Leadership Council for consent.
5. The president informs the sister transfer of the decision in writing. A copy of this letter is also sent to the director of transfers and to the superior general of her former congregation.
6. At this point she will join a mission unit in consultation with the director of transfers and the

mission councilor for that unit.

7. At least two weeks before the ceremony the transfer director obtains the following legal forms, which the sister transfer signs in the presence of the chief financial officer:
  - Durable Power of Attorney for Health Care and for Financial Affairs
  - Agreement of Sisters Under Vows,
  - Cession of Administration and Disposition of Use and Usufruct,
  - Last Will and Testament.
8. During or after the ceremony, the Testimonial of Profession is signed in the presence of the president and another witness.

After incorporation, the sister is encouraged to remain in the Monroe/Detroit area for at least two more years to continue her integration into IHM life and to know and be known by the Congregation.

### ***Readmission to the Congregation***

The program for persons seeking to be re-admitted to the Congregation may be similar to that for those seeking transfers. These are some key differences.

1. The candidate is one who legitimately left the same congregation, after having completed the novitiate or after profession (temporary and or perpetual). She is not a religious in vows. The President with the consent of her Council decides on admission; there is not other congregation involved.
2. The probationary time before temporary vows is at the discretion of the president.
3. Profession of temporary vows is obligatory, even if the candidate was perpetually professed when she left. The minimum length of three years required by the Code is necessary, but the President has discretion in permitting perpetual vows earlier than the longer time allowed by canon law and the Constitutions.
4. The program appropriate to the date re-entering will depend greatly on what her stage of formation was when she left, and how long ago that was. This will involve her level of education and ministry preparation.
5. One who has been out of the congregation for some time may have more property which, if she is professed, will constitute personal patrimony. In the probationary period, since she is not yet a vowed religious, her property may be handled more in the manner that applies to candidates and novices.

### ***Financial Guidelines for Sisters in the Transfer Process***

#### *At Time of Entry into Process*

Early in the process, the sister and her director will meet with the chief financial officer of the congregation, in order to begin the orientation to IHM policies and practices.

***Patrimony*** Any money or property (including cars) owned by the sister accepted into the Transfer Process is considered patrimony. Canon law requires that patrimony be administered by someone other than the sister. The sister is advised to discuss the canon law requirements with the chief financial officer.

Since she is at a crossroads in her life, the sister may want to reconsider her former choice of administrator for her patrimony. She may also have accumulated more patrimony during her exlaustration. For these reasons, she is advised to sign a Cession of Administration form, naming the administrator of her choice. Two possible options are:

1. *IHM Congregation*

All assets should be listed on the reverse side of the cession form. Money and stocks should be sent to the chief financial officer for safekeeping. The sister should also indicate what she wants done with any proceeds realized from these holdings. The options which canon law gives the sister are explained below.

2. *someone other than the IHM Congregation* (a relative, a lawyer or a bank).

The name of the person or institution should be listed on the front of the cession form. Additional information such as the address of the administrator should be listed on the reverse side. The sister should list also all assets and their location. All assets should be sent to the administrator.

**Cars** As explained above, patrimony includes cars. The sister has two options for a car she may have in her possession:

1. to sell the car at the time of entrance and place the money in patrimony; or
2. to list the car on the cession form as an asset. The fair market value should be listed and the car title transferred to the IHM Congregation. If the sister is not incorporated into the IHM Congregation, the amount listed as fair market value is returned to her as patrimony.

### *During the Transfer Process*

**House budget** Each sister in the Transfer Process completes her yearly house budget, using the same forms and process as any other member of her local community. The budget provides for a twelve-month period regardless of the length of the sister's contract. The sister submits her budget for approval by the director of transfers at the beginning of each fiscal year. The house treasurer also keeps a copy as she would for any other member of the local community.

**Car expenses** The sister follows the policies in effect for IHM members at the time she is in the process. The director of transfers guides her in this matter.

**Extraordinary expenses** Extraordinary expenses are significant medical costs, special retreats, and emergency travel expenses. The transfer director budgets for these in the congregational account for transfers. Except for emergency costs, these expenses are discussed with the transfer director at budget time so that they may be included in the general account.

Spiritual direction is not an extraordinary expense. The sister includes it in account #5258 in her yearly budget.

**Education expenses** The director of transfers budgets for workshops and other educational opportunities. The sister requests the money needed using the congregational education forms. The director of transfers receives these forms from the sister and



processes them through the usual channels.

*Escrow* While she is in the Transfer Process, the sister follows the same policies regarding finances as the IHM members do. Any earnings beyond the amount approved for her budget are sent to the director of transfers to be deposited in the congregational funds. These funds are reserved in an escrow account until the sister transfers her vows in the IHM Congregation. If she leaves the process she receives the money reserved in her escrow account minus any expenses incurred on her behalf by the Congregation (e.g. education program expenses). If, for some reason, the sister's expenses are greater than her earnings, the Congregation assumes the expense.

*Social Security* While the sister is in the Transfer Program, her original Congregation has the option of keeping her on their Social Security roster. Payment of the sister's share of the FICA tax is made to her original Congregation from her earnings.

If the sister is in a church-related ministry and her original Congregation will not keep her on their roster and pay Social Security for her, she will forego Social Security coverage for the quarters she is in the Transfer Process. This is because her earnings are tax-exempt as a religious and paying FICA taxes as a lay person would jeopardize this exemption.

If the sister works in a taxable situation, her employer pays her Social Security, as is done for every other employee who is not under religious vows.

*At Formal Incorporation into the IHM Congregation*

After the sister has been accepted into full membership in the IHM Congregation, her name is added to the roster for FICA payments if she is in a church-related ministry.

She is accountable to a mission councilor as is specified in our Constitutions for all members.

*Revised December 2011*

# SUSTAINABLE COMMUNITY

## A COMMITMENT TO BUILD SUSTAINABLE COMMUNITY

As in the early Christian community, we hold all things in common. From this community of goods each one's needs are met, and to this community of goods each one contributes according to her ability.

More than this, as a community, we commit ourselves to live a simple life style, to share what we have with those in need, and to use our resources in action on behalf of justice.

In this way, we express our interdependence with one another and with all peoples and, recognizing our human weakness give thanks for God's mercy and saving power.

*IHM Constitutions, Article 22*

Convinced that the plight of the Earth is intimately connected to global poverty, violence and oppression, we commit our personal and communal efforts and resources to build sustainable community.

*Chapter Directions 2000*

We chose to invite partnership in building a culture of sustainability wherever we live and minister.

*Chapter Directions 2005/2006*

In the spirit of building a 21<sup>st</sup> century community on the IHM Monroe campus, we reaffirm the Integrating Idea and Vision for the Campus to model sustainable buildings and methods of care, "to educate around and be expressive of the best knowledge and experience in holistic health care for aging" and to incorporate "the principles of sustainability" in all aspects of daily operations.

*Guiding Principles of the Integrating Idea  
Reaffirmed by Integrated Planning Team 2011*

## **SUSTAINABLE COMMUNITY**

### **IHM MOTHERHOUSE**

#### ***Home to the Motherhouse Resident Community and the IHM Health Care Center***

The IHM Motherhouse has long been considered “home” to IHM sisters. It is the place where many experienced initial formation and education. The Motherhouse continues to be the gathering place for most large scale community meetings, assemblies and gatherings.

Within the Motherhouse we have the “Motherhouse Resident Community” and well as the IHM Health Care Center.

Some sisters come to the Motherhouse to live in community while continuing to be actively involved in ministries. Others come “home” when they are ready for a part time ministry or retirement from active ministry so they can participate in the life of the community in new and creative ways. They may live independently or with some assistance as part of the Motherhouse Resident Community (MRC).

The Motherhouse has been open to relatives of the sisters and other lay women and men who need services that we are able to provide. In some cases, family members are part of the Health Care Center and at other times they are welcomed into the resident community.

The policy, “Care of Aging /Sick Relatives of IHM Sisters” explains in detail the steps needed for admission to the Motherhouse Resident Community by potential residents who are not IHM sisters. Inquiries should be made to the Motherhouse Residents’ Administrator at: 734-240-9749.

The policy, “Philosophy on Sharing Our Home” details the process for admission to the IHM Health Care Center. Check the website at [www.ihmhealthcare.org](http://www.ihmhealthcare.org) or call the admissions’ office at: 734-240-9697.

Visit the IHM website at [www.ihmsisters.org](http://www.ihmsisters.org) or [www.ihmhealthcare.org](http://www.ihmhealthcare.org) to view mission statements, rights and responsibilities of residents in either the Mother Resident Community or the Health Care Center.

### **HEALTH CARE CENTER**

#### ***Philosophy on Sharing Our Home***

The Sisters, Servants of the Immaculate Heart of Mary Monroe, Michigan, Inc. (IHM) have welcomed others into our home when circumstances indicated that this was the best option, although our first priority is the care of IHM members. We are open to sharing the IHM

Motherhouse facility with the aging and sick relatives of our members, with members of other religious communities, priests, IHM Associates, former members of the IHM Community or other elderly persons when the placement is deemed appropriate and space allows.

#### *Health Care Mission Statement*

The Sisters, Servants of the Immaculate Heart of Mary Health Care Center embraces the redeeming and healing mission of Jesus through our continuing commitment to provide the highest quality of holistic, compassionate and professional care to those who are sick and infirm. We commit ourselves to creating an atmosphere of life where each resident and staff member can live the highest quality of health and relationships.

In our *IHM Constitutions*, we state:

As in the early Christian community we hold all things in common. From this community of goods each one's needs are met and to this community of goods each one contributes according to her ability. More than this, as a community, we commit ourselves to live a simple life style, to share what we have with those in need, and to use our resources in action on behalf of justice.

In this way, we express our interdependence with one another and with all peoples, and recognizing our human weakness, give thanks for God's mercy and saving power.

*IHM Constitutions, Article 22*

We are responsible and accountable for all the resources under our management to assure the accomplishment of our Mission.

As a witness to our Roman Catholic faith tradition, the SSIHM Health Care Center (Sisters, Servants of the Immaculate Heart of Mary), as an integral part of the Motherhouse, strives to be a community of respect, love, and support to patients or residents and their families and encourage them to make decisions in light of Gospel values, medical ethics and global realities.

#### *Major Policy*

The IHM Health Care Center, a licensed and certified facility in the state of Michigan, is open to providing Health Care services to non-IHM's when such care is requested, and when it is deemed appropriate given our ability to service the person's physical, spiritual, psychological and emotional needs; the availability of space; the compatibility with our philosophy and mission, and the individual's ability to meet financial obligations. Since our beds are classified as "Religious Use Beds", individuals must be supportive of our mission as Roman Catholic Religious Women.

#### *Criteria for Admission*

- Person must qualify for skilled nursing care.
- SSIHM Health Care Center must be able to provide the services the individual requires (psychological, spiritual, physical, emotional) in the appropriate licensed area of the

health care center.

- Person must be able to meet the financial obligations through Medicare, Medicaid, private insurance plans or private pay.

*Note:* A person may be admitted as a permanent or temporary resident. For example: a person may be in need of temporary rehabilitation services following injury or surgery that SSIHM can provide.

### *Referrals*

Request for admission may be made by the potential resident's family member, community representative, diocesan advocate, IHM sister or by the individual her/him self.

### *Evaluation*

Once a request is received, the SSIHM Health Care Administrator will review the request and if criteria for admission seem appropriate, a committee with a team that includes staff from nursing, pastoral care, social work and someone from the IHM Community will assess the potential resident to ascertain if services needed can be delivered by our SSIHM Health Care Center.

### *Financial Criteria*

The Director of the Congregational Business Office will meet with the individual and/or guardian to review the ability to meet the financial obligations. Financial disclosures will be submitted and reviewed by the director.

### *Admissions*

Once all of the above arrangements (payor source and ability of the SSIHM Health Care Center to meet the needs of the individual) are met, the individual is approved for admission.

### *Needed Submissions*

- Admission orders
- Recent chest X-rays (90 days or less) showing person is free from active Pulmonary Tuberculosis
- Medical History Report

### *What services can a resident expect?*

- Comfortable Accommodations  
The IHM Health Care Center is located in our beautifully renovated Motherhouse on an expansive campus in Monroe, Michigan. Almost all of our rooms are private rooms; all with attached lavatories.
- Patient: Staff Ratio  
Our staff ratio makes it possible to provide specialized care and opportunity for daily activities – in the Health Care Center as well as in other areas of the Motherhouse.
- On Site Services
  - Opportunities for religious services and personalized pastoral care

- Regular visits by physicians, nursing practitioners, physician assistants
- Lab technicians
- X-ray
- Pharmacy services
- Dental services
- Hospice and Palliative care
- Dietary and Nutritional services
- Social Work and Psychological services
- Recreational and Therapeutic activities
- Rehabilitation
  - Residents are referred by physicians for rehabilitation services. Excellent therapists provide service “on site.”

For more information, please contact:

Director of Admissions  
734-240-9697

Or visit our website: [www.ihmhealthcare.org](http://www.ihmhealthcare.org)

### ***Admission of IHMs to the Health Care Center***

It is the intent of the IHM congregation that excellent professional skilled care be provided in all areas of IHM Health Care Center, which includes the licensed area, the third floor unlicensed area and Memory Care.

In order to maximize revenue for health care services, all beds in the skilled care unit are to be filled as much as possible with those who qualify financially for reimbursement. This includes IHM sisters and the public.

Short-term admittance to the licensed area is determined by the IHM Health Care Admissions Coordinator in consultation with appropriate medical personnel. Long-term admittance requires consultation together with the IHM Leadership liaison and the IHM Health Care Center.

Admittance to the unlicensed area and Memory Care is restricted to IHM Sisters, Associates and family members of IHM sisters upon approval by the IHM Leadership Council. The same policies and procedures apply as are used for admittance to the independent living area of the Motherhouse building.

IHM Sisters who qualify medically will be admitted if there is a bed available. Admission will preferably be in the licensed area if the sister qualifies for reimbursement from Medicare, Medicaid or other insurance.

Sisters who are scheduling medical procedures which will result in the need for skilled nursing are encouraged to contact the Admissions Coordinator (by phone at 734-240-9697 or go to the website, [www.ihmhealthcare.org](http://www.ihmhealthcare.org). “Contact Us” section to leave a message) as part of their preparation in ample time to ensure that a bed will be available for them when needed.

If the IHM Health Care Center is not appropriate for a sister's needs or if she is unwilling to cooperate with the medical staff, she is encouraged to seek another medical facility to meet her needs with the approval of her mission councilor.

Sisters who qualify medically, but not financially, will be admitted to another area of the Health Care Center if there is a room available. Exceptions will be made for special needs and the cost of skilled care in the licensed area will be covered by the IHM congregation as "private pay."

If there is no skilled care bed available in the licensed area and the sister qualifies for reimbursement, temporary admission will be to the third floor of the Health Care Center until a bed is available in the licensed area.

*Accepted by Leadership Council, September 2011*

## **CARE OF AGING/SICK RELATIVES OF IHM SISTERS**

### **IHM PHILOSOPHY ON SHARING OUR HOME**

The Sisters, Servants of the Immaculate Heart of Mary Monroe, Michigan, Inc. (IHM) have welcomed others into our home when circumstances indicated that this was the best option, though our first priority is the care of IHM members. We are open to sharing the IHM Motherhouse facility with the members aging and sick relatives, as well as former members and priests when appropriate and space allows.

As in the early Christian community we hold all things in common. From this community of goods each one's needs are met and to this community of goods each one contributes according to her ability. More than this, as a community, we commit ourselves to live a simple life style, to share what we have with those in need, and to use our resources in action on behalf of justice.

In this way, we express our interdependence with one another and with all peoples, and recognizing our human weakness, give thanks for God's mercy and saving power.

*IHM Constitutions, Article 22*

We are responsible and accountable for all the resources under our management to assure the accomplishment of our Mission.

As a witness to our Roman Catholic faith tradition, the IHM Health Care Center, as an integral part of the Motherhouse, strives to be a community of respect, love, and support to patients or residents and their families as they face diminishment and the reality of death. What is hardest to face in the process of dying is the pain that so often accompanies terminal illness, along with the dependency and helplessness. One of the primary purposes of medicine in the care of the dying is relief of pain and suffering. Effective management of pain in all its forms is critical in the appropriate care of the dying. IHM, in a holistic approach, is attentive to the physical, social and spiritual pain endured by residents and will use the appropriate means to alleviate suffering.

The truth that life is a precious gift from God has profound implications for the question of stewardship over human life. We are not the owners of our lives and, hence, do not have absolute power over life. We have a duty to preserve our life and to use it for the glory of God, but the duty to preserve life is not absolute, for we may reject life-prolonging procedures that are insufficiently beneficial or excessively burdensome. Therefore, residents are encouraged to exercise the right to determine their medical plan after consultation with medical experts.

*October 1, 2009*

### **MAJOR POLICY**

The Congregation recognizes and supports IHM sisters who need to be involved in the care of aging/sick members of their immediate families.



## **OPERATIONAL POLICY I**

When the care of an aging/sick member of a sister's immediate family becomes a concern, the sister discerns with her mission councilor the extent to which she is able to commit herself as caregiver.

The "IHM Pastoral Reflection on the Care of Aging Relatives" should serve as the basis for the discernment.

### ***IHM Pastoral Reflection on the Care of Aging Relatives***

As an IHM Congregation, we share with our American culture a growing consciousness of and concern about the aging process – our own and that of the whole society. At Assembly '87 we articulated our commitment to pursue an understanding of the process and to cherish the aging as persons with unique gifts and the wisdom of experience.

Such a commitment requires that we examine our own stereotypes about aging and reclaim in healthy, creative ways the right of older persons to a primary claim over their life decisions. We are growing to understand and trust that persons age uniquely and need to speak on their own behalf at every possible opportunity. This insight must undergird our response to the issue of our own aging and to that of care for aging relatives.

The vast and far-reaching changes in our culture are reflected in religious life. Evolving structures and broadening perceptions of ministry bring new riches and place new stresses upon us individually and communally. This is especially true as we extend our commitment of support and care beyond our members, particularly to those in our families.

Family dynamics are complicated and powerful. Whether relationships are healthy or strained (or both), we are profoundly connected to our roots and to all that the family of origin or adoption has meant to us.

Previous theologies and policies of religious life have not clearly demonstrated an understanding of the impact of that connection and the demands it places upon us. We are reaching, however, a point of greater insight into the role the family plays in who we are, how we relate to life's joys and struggles, how we deal with decision-making and how we establish priorities. Religious (both men and women) continue to reflect on and adapt to these changing awarenesses. Adult relationships within the family of origin are a source of both strength and confusion and usually include unresolved areas that have an impact on current decision-making. These areas of unconscious influence can become particularly problematic when family members request our help as caregivers. We may be faced with questions we have had no opportunity to address prior to the present crisis and with inner dynamics which are quite convoluted.

Since each situation is unique and brings to bear a long history of relationships, it is neither possible nor advisable to formulate a definitive congregational policy.

Nevertheless, it is clear that there are important questions which we need to address together.

This pastoral statement invites us to reflect on some of the issues and dynamics involved in clarifying our role as religious women within families with growing needs for care.

### *Guidelines*

1. Decisions should be based on the present need and situation of the sister's family, as well as the Congregation's.
2. Communication/discussion among the aging person, the sister and other family members will take place to assess the needs of the aging person and the possibilities of how these needs can best be met.
3. The sister discerns with her mission councilor:
  - her health and energy;
  - potential stress involved as caregiver;
  - the balance in meeting her personal, congregational, ministerial, and family needs;
  - the supportive role of the Congregation, local community, support groups, and her mission unit;
  - the extent of her involvement as committed caregiver;
  - a periodic assessment of the member's care giving responsibilities (See addendum section on Periodic Assessment).
4. In those instances when the sister becomes the primary caregiver, a written copy of the family's agreement regarding care-sharing and financial responsibility is given to the sister.
5. Predetermined periodic assessments of the situation are made by the sister, the aging person, and all committed caregivers.
6. Reassessment, as stated above, is done promptly when a crisis occurs or circumstances change.

### **OPERATIONAL POLICY II**

Members of an IHM sister's family, IHM Associates, former members or priests may be admitted as residents to the Motherhouse Resident Community when space allows. The criteria approved by the Leadership Council in consultation with the Residents' Administrator and admission team must be met before the admission.

The admission team normally includes representatives of the Motherhouse Resident Community Administration and Congregational Business Office, social work, pastoral care, medical and nursing fields and is appointed by the IHM Leadership Council.

### *Criteria for Admission*

- compatibility with IHM values
- willingness to participate in community living
- adequate financial resources

- successful admission evaluation
- an IHM sister-sponsor accompanies the applicant

Admission will also depend on the availability of appropriate services. The Residents' Administrator and staff have the same responsibility to provide appropriate services to the resident guest as they offer an IHM sister.

*Process in seeking residency*

1. The IHM Pastoral Reflection on the Care of Aging Relatives should serve as the basis for the discernment done jointly by the sister sponsor and her mission councilor. The admission packet including the rate sheet is given with the application process for Medicaid enclosed. The Pre-Admission Check List is initiated at this point by the mission councilor. (See Pre Admission Check List following the policy.)
2. Communication between the sister sponsor, the sister's mission councilor, the Residents' Administrator or her appointed representative(s) and the applicant is maintained during the process
3. A letter of request, including a brief family history, the other care options explored and reason for seeking admission, is submitted by the sister sponsor and the applicant to the Residents' Administrator, who shares the request with the mission councilor.
4. Upon receiving the request and after discussion between the sister sponsor and her mission councilor, the mission councilor consults the Leadership Council for support to begin the process.
5. The Residents' Administrator and members of the admission team have interviewed the applicant and/or the family.
6. An assessment of need and evaluation of the applicant are made by the admission team. Financial matters and residency expenses are assessed with the Chief Financial Officer and/or her representative and the sister's mission councilor. The "Financial Disclosure Statement" will be completed at this time. (See Financial Disclosure Statement following the policy.)
7. Pending appropriate findings during the clinical and financial evaluations, the final recommendation is formulated by the admissions team and sent to the Leadership Council.
8. The Leadership Council reviews the recommendation and communicates the admission decision to the Residents' Administrator.
9. The Residents' Administrator communicates the admission decision to the applicant.
10. Written acceptance of the applicant as a resident guest is made by the Residents' Administrator.
11. Admission planning is done with the perspective resident, the family and/or the current facility of residence.
12. There will be a continual evaluation during the first 90-days to assure suitability of the placement for the good of all. The Residents' Administrator communicates the decision to the Director of Financial Services.

### *Required Documents for Admission Application*

1. Complete medical records of the applicant.
2. A list of family names and phone numbers indicating the preferred order of calling in the event of an emergency.
3. A *Financial Disclosure Statement*, including the most recent bank and investment statements, is to be completed by the prospective resident or the financially responsible party for the prospective resident.
4. A signed statement in which the applicant or applicant's family accepts responsibility for the payment of additional services such as testing, prescriptions, etc.
5. A fully executed durable power of attorney for both health care and finance
6. A signed statement acknowledging the applicant's or family's responsibility for all funeral and burial arrangements.
7. A *Resident Guest Agreement* is signed at the time of admission.

In conclusion, we recognize that there are many steps involved in assessing the possibility of living in the IHM Motherhouse Resident Community. If the process seems arduous, we hope that it leads to a decision that is best for all concerned. If the decision is that you are able to come and live with us, we shall welcome you warmly, as part of the extended IHM family.

*Affirmed by Central Administration, September 1988; Revised 1993  
Revised and Approved by Leadership Council, December 2009; September 2011*

### *Addendum to Care of Aging/Sick Relatives of IHM Sisters*

#### *Further Reflection on Caring for Aged/Sick Family Member*

At the core of the family support decision lies the need for a delicate balance that takes seriously both the claims of our roots and the call to community/mission.

It is important to ask:

How do responsibility to family and the commitment to religious community influence the role played in caring for the aged/sick relative?

How do these factors influence the perception when a crisis in care arrives?

- unresolved grief,
- ethnic expectations,
- addictive patterns,
- mental health status,
- financial pressures,
- loneliness and safety concerns.

#### *Consideration Before Decision-Making*

As a Congregation, we choose to remain open to a variety of possibilities for all situations. That same attitude of openness is critical in discerning the balance between the commitments

to religious community and to the support and care of aging relatives. Not being open to many possibilities in such a complex situation can result in an impulsive first move which becomes difficult to re-examine as time goes on.

Possibilities might include:

- a family phone-call system,
- a personal support network, including neighbors, other relatives, and friends,
- meals on wheels,
- electronic communications systems,
- individually hired help,
- agency help,
- senior citizen residence with some care provided,
- a group home.

Many variables must be acknowledged in the decision-making process:

- Is the sister an only child?
- Is the family large? Geographically or emotionally close?
- What is the quality of the relationships of other family members to the aging relative? How does this have an impact on the decision for caregiving?
- Is there a relative the aging person prefers for care? Would this be a possible (and positive) arrangement?
- What will be the influence of other family members and friends on the decision-making process?
- How much physical and psychic energy does the sister have at this time?

Particular stresses are encountered by those who live or work at a distance from the family, since it is often difficult to assess the amount and kind of care needed when relying on other persons for information. The uncertainty which sometimes results in these instances can hamper a sister's freedom regarding any future planning or ministerial commitment.

Many factors are involved in a decision as to whether or not, when, and under what circumstances a sister might move in with a relative. Full-time care, whether at home or in a specialized facility, is a solution demanding serious consideration when an aging relative can no longer live alone or live alone with regular, in-home assistance. If other options are not tenable, a sister may consider becoming the caregiver, in consultation with her Mission Councilor.

#### *Factors in the Decision to Move in with a Relative*

Should moving in with a relative who needs care seem the best possible solution, considerations should include:

- clarity about whose needs are being met (the aging persons, the sister's, other family members);
- adequate dialogue among family members (an understanding can never be assumed);
- preparedness for re-entering the parental home without becoming a child again (prior discussion about expectations for schedules, driving, other commitments);

- reflections about how the sister's commitment to the Congregation can best be maintained and nurtured during this time.

### *The Role of the Congregation*

The role of the Congregation in this area is being clarified. Given our consistent commitment to justice, this issue lies well within the parameters of congregational directions, yet raises new areas for consideration.

- What role does congregational leadership, local communities, support groups, and mission units play in providing emotional or practical support for the sister who has care of a relative as her primary or secondary ministry?
- What can be expected of the sister while she works to balance congregational, ministerial, family, and personal needs?

### *Financial Considerations*

Financial questions have an impact on all areas of congregational life. Each member of our Congregation is encouraged to grow in understanding of and mature co-responsibility for our common funds. This continues to be true when a free and mutually understood decision has been made for a sister to become the primary caregiver for a family member. Again, the ideal is balance.

### *Clarifying Questions*

- Will the sister continue a ministry while living with the family member?
- Can financial responsibility be shared by family members (e.g. pay the sister some salary as well as room and board)?
- Can the Congregation offer supportive financial or health care services to sisters' families unable to afford or imagine other ways to provide care?

Arriving at financial decisions is a delicate and difficult process. The sister may initiate such conversation with her family and the Congregation, or if she is unable or feels unclear, a congregational member of her choice may be invited into the process. This document might be shared by the sister and family members to focus the conversation.

### *Periodic Assessment*

As in any other ministerial situation, a periodic assessment can be expected as part of the arrangement. Such an assessment might include:

- an on-going clarification of the time commitment;
- examination of the present stresses and the sister's energy level;
- consideration of other supportive services as needed;
- a continuing evaluation of options:
- need for the parent to move in with another relative for a time,
- need to move to a long-term care situation.

In the course of the assessment, the sister may need to face the reality that she will accompany the parent through a dying process. This will call for the conscious preparation for her own experience of loss and grief.

**CARE OF AGING/SICK RELATIVES OF IHM SISTERS  
MOTHERHOUSE RESIDENT COMMUNITY/HEALTH CARE CENTER  
PRE-ADMISSION CHECK LIST**

*Please initial and date as items are completed.*

<p>_____</p> <p>DATE</p> <p>_____</p> <p>INITIAL</p>	<p><i>The mission councilor has met or communicated with the sister sponsor of the admission requestor. The admission packet, including the rate sheet and application process for Medicaid, is given. The Pre-Admission Check List is initiated at this point by the mission councilor. (See Pre Admission Check List following the policy.)</i></p>
<p>_____</p> <p>DATE</p> <p>_____</p>	<p><i>A letter of request seeking admission has been received by the mission councilor. <b>Please attach letter to this check list.</b></i></p>
<p>_____</p> <p>DATE</p> <p>_____</p>	<p><i>The mission councilor has informed the Leadership Council and they have affirmed proceeding with the admissions process.</i></p>
<p>_____</p> <p>DATE</p> <p>_____</p>	<p><i>The Residents' Administrator or Health Care Center Administrator and members of the admission team have interviewed the applicant and/or the family. If necessary, the admission team makes a pre-admission visit to the applicant to determine the appropriateness of the admission to the Motherhouse.</i></p>
<p>_____</p> <p>DATE</p> <p>_____</p>	<p><i>The Chief Financial Officer and/or her representative along with the mission councilor have met with the applicant or the family to discuss financial arrangements.</i></p>
<p>_____</p> <p>DATE</p> <p>_____</p>	<p><i>A written recommendation has been made by the admission team regarding the financial and clinical evaluations and sent to the Leadership Council.</i></p>
<p>_____</p> <p>DATE</p> <p>_____</p>	<p><i>The recommendation has been reviewed by the Leadership Council and the admission decision communicated to the appropriate Administrator.</i></p>

_____ <i>DATE</i>  _____ <i>INITIAL</i>	<i>Admission planning has been done by the appropriate Administrator with the perspective resident, the family and/or the current facility of residence (hospital/other nursing center).</i>
_____ <i>DATE</i>  _____ <i>INITIAL</i>	<i>The admission is scheduled for _____ (DATE).</i>

***Required Documents for Admission Application***

- 1. Complete medical records of the applicant.*
- 2. A list of family names and phone numbers indicating the preferred order of calling in the event of an emergency.*
- 3. A Financial Disclosure Statement, including the most recent bank and investment statements, is to be completed by the prospective resident or the financially responsible party for the prospective resident.*
- 4. A signed statement in which the applicant or applicant's family accepts responsibility for the payment of additional services such as testing, prescriptions, etc.*
- 5. Fully executed durable power of attorney for both health care and finance.*
- 6. A signed statement acknowledging the applicant's or family's responsibility for all funeral and burial arrangements.*
- 7. A Resident Guest Agreement is signed at the time*



**Sisters, Servants of the Immaculate Heart of Mary, Monroe, Michigan, Inc.**  
*Financial Disclosure Statement\**

*\*To be completed by the prospective resident or financially responsible party for the*

*Name* \_\_\_\_\_

<i>Assets Declaration</i>	<i>Value</i>
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<i>Checking /savings accounts</i>		
<i>Cash on hand / Safe Deposit</i>		
<i>CD</i>		
<i>Trust or annuities</i>		
<i>Investments</i>		
<i>Other Assets</i>		
<i>Total Value</i>		\$

<i>Income</i>	<i>Monthly Income</i>
---------------	-----------------------

<i>Social Security Benefits</i>		
<i>Retirement Benefits</i>		
<i>Investment Income</i>		
<i>Other Income</i>		
<i>Total Monthly Income</i>		\$

<i>Please attach a copy of the most recent tax</i>	
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<i>Verified by</i>	
<i>Relationship to applicant</i>	

# HEALTH CARE ETHICS POLICY

## ORGANIZATIONAL POLICY

The IHM Leadership Council, in consultation with the IHM community and the IHM health care providers, has established an interdisciplinary, health care ethics committee. The membership of the Committee will reflect a balance of clinical, professional and non-clinical persons who represent IHM and the scope of service offered within the IHM Health Care Center.

The IHM Leadership Council will appoint the members of the Health Care Ethics Committee. Semi-annual reports on the work of the Committee will be given to the Leadership Council.

The functions of the Committee are:

1. *Forum*: To provide opportunities for interdisciplinary dialogue on a broad range of concerns, questions and problems about clinical and organizational ethics;
2. *Case Review*: To provide consultation and advice to staff, residents, community members and families regarding ethical issues;
3. *Policy Development and Review*: To advise and assist the organization in the development and review of policies related to the ethical and resident right issues;
4. *Education*: To serve as a resource for staff and community concerning ethical issues and resident rights.

## OPERATIONAL POLICY

A health care ethics consultation process has been established by which residents, their advocates, staff and administration may request an ethics consultation in the resolution of a clinical ethics concern.

The following procedure will be utilized to facilitate identification, analysis and resolution of ethical concerns in the care and medical treatment of IHM Health Care Center residents. Ethics consultations are confidential, respectful to those involved, and consistent with *The Ethical and Religious Directives for Catholic Health Care Services* and other national practice guidelines in bioethics.

An ethics consultation may consist of some or all of the following:

- Identification of the ethical issues or questions being raised
- Review of the medical information
- Review of information about the preferences, beliefs and values of those involved
- Review of the relevant Health Care Center policies and procedures
- Review of *The Ethical and Religious Directives for Catholic Health Care Services*
- Assistance with discussion about choices and options
- Identification of ethical options for the patient, family and clinical staff members to consider
- Legal consultation, if necessary

## **CONSULTATION GUIDELINES AND REPORTING**

Requests for an ethics consultation may be made by residents of the IHM Health Care Center, their chosen health care advocates, families and health care professionals.

A request for an ethics consultation should be made by contacting the Pastoral Care Office by phone at 734-240-9699, by pager 313-814-8325 or in writing. The Pastoral Care staff will immediately notify the Ethics Committee member on call of the consultation request. If the Ethics Committee member on call perceives a direct or potential conflict of interest, then he or she will contact another Committee member to perform the consultation review.

The on-call Ethics Committee Member performing an ethics consultation will:

1. Review the chart.
2. Talk with the nurses, resident, appointed health care advocate(s) and other clinical staff members as appropriate.
3. Consult other committee members available *and those within the appropriate disciplines* to develop recommendations
4. Make a brief note in the Progress Notes of the resident's chart indicating:
  - that an ethics consultation was requested;
  - that the Committee met and developed recommendations;
  - that the recommendations being made are set forth;
  - that the recommendations were discussed with the person requesting the consultation, and if appropriate with the resident and/or their health care advocates, and health care professionals involved.
5. The committee representative will then complete an "Ethics Consultation Report" and provide it to the chair of the Ethics Committee for follow up and reporting purposes.

*Formulated by the IHM Health Care Ethics Committee April 3, 2008  
Approved by Leadership Council December 2009*

**ETHICS CONSULTATION REPORT**

**To: Health Care Center Ethics Committee**

**Date of Request:**

**Date of Consultation:**

**Referral Source (doctor, nurse, etc.):**

**Resident name:**

Please complete form and provide a copy to Ethics Committee Chairperson.

1. What are the requester's ethical concerns? What are his or her recommendations (what does he/she think should happen in this case?) What decisions need to be made? How soon do they need to be made?
  
2. What information has been gathered about the case (medical, psychological, spiritual)?
  
3. What are the resident/advocate's wishes, values and goals?
  
4. Names of Ethics Committee Members consulted:
  
5. Recommendations made:



## **PERSONAL DEVELOPMENT**

### **EDUCATION OF IHM SISTERS**

#### ***Major Policies***

1. Each sister has the responsibility and shall have the opportunity for personal, professional and continuing education for ministry. A congregational education fund is provided to assist in this implementation.
2. The education budget allocations shall be administered according to the principle of equity, making congregational resources accessible to all sisters according to the needs of our ministry and the needs of the person.
3. The Leadership Council determines who shall administer the education budget allocations.

*Approved by SSIHM Congregational Governing Board, March 1990*

#### ***Operational Policies***

1. The education fund is designated for the education of IHM sisters. The fund increases through proceeds from returns on investment, donations, royalties, and earnings of full-time students.  
  
One and a half million dollars of the fund are reserved for investment only. Proceeds in excess of that amount support the education budget for the following year. Earnings remain invested until they are needed.
2. The SSIHM Corporation Board approves the annual education budget for full-time and part-time program study.
3. An Education Committee is appointed by the Leadership Council and is chaired by a member of the Council. A secretary is appointed to work with the Education Consultant or chairperson of the Education Committee. Minutes, reports, and education records are maintained by appropriate committee members and staff.
4. The director of financial services serves as consultant to the committee, assists the chairperson in budget preparation, and provides financial reports.
5. The Education Committee administers the annual budget allocations for full-time and part-time degree programs and for professional certification programs that exceed \$2,500.00 per year.
6. The mission councilor approves all individual program and budget requests for full/part time study not to exceed \$2,500.00 per fiscal year, up to three years.
7. The Education Committee considers study requests according to the following priorities:
  - sisters continuing in approved programs;
  - sisters requesting bachelor's or first master's degrees;
  - sisters needing degrees/programs/certificates for updating, changing, or maintaining ministry.

### *Full-Time, Part-Time, and Non-Program Study*

1. Full-time students, including those in professional certification programs attending class on a full-time basis for a semester or less, receive funding for education, health insurance, and living expenses.
2. Part-time students receive funding for education expenses.
3. Non-program funds are granted for workshop and conference fees, room/board, and travel for the workshop/conference.
4. The education consultant approves requests for non-program funds up to \$1,500.00.
5. Requests for education funds should relate to personal and professional development or to a planned preparation for ministry.

### *Preliminary Steps for Program Study*

As part of the process for seeking approval for program study, the applicant addresses each of the following points in written form when making formal application for study to the Education Committee.

1. Self-Assessment
  - Since the program/degree you are requesting is within the context of your total development, it is appropriate that you do a personal assessment of your  
educational background  
personal gifts  
experiential strengths, skills, training.
  - What instruments or processes have you used?
  - What was the manner of feedback from them?
  - How have you tested your interest and capacity for this field?
  - Describe and evaluate these means.
  - Are there currently employment opportunities in this field?
2. Projections
  - What are your plans regarding your future in the ministry for which you are preparing?
  - How are they in congruence with our congregational goals and needs?
3. Program Requirements
  - With whom have you consulted to determine the specific requirements or training necessary before you are qualified or certified for a position in this field?
  - What are pre-requisite or post-degree requirements for you?
4. Evaluation of Institutions
  - Which institutions offer the requested program?
  - What are the strengths and weaknesses of the programs offered?

### *Process for Program Study*

The process for program study usually takes a year from an initial conversation of the sister with her mission councilor to the decision of the Education Committee. The committee meets three times each year to grant requests for programs to begin the following academic year.

1. The applicant discusses with her mission councilor her need for study and her plans for its use in her ministry.
2. She then completes the *Preliminary Steps for Program Study* which includes:
  - a self-assessment and plans for future ministry;
  - the program she wishes to follow;
  - her research comparing possible institutions for study;
  - an estimate of her expenses for each year of study;
  - a timeline for commencement and completion of the program, and
  - any other pertinent information.

Upon completion of the “Preliminary Steps for Program Study” and the approval of her mission councilor, the mission councilor sends the documents to the Education Consultant who presents it for approval to the Education Committee. An applicant may ask to appear before the committee to present her request for study.

3. The committee considers carefully the applications and recommendations of the sister’s mission councilor in the light of congregational needs and goals, the ministry goals of the applicant, and the availability of funds in accordance with established priorities.
4. The committee approves requests for professional certification and degree programs and allocates the budgeted funds according to annually established patterns for full-time and part-time programs. The number of applications and the limits of the budget may affect the decisions.
5. In the name of the committee, the education consultant sends a letter of decision to the applicant as well as the “Request for Program Study Funds for Quarterly/Semester Program Study.” This form is completed and returned to the Education Consultant for the distribution of funds. The education consultant records the request and sends it to the Congregational Business Office. The Congregational Business Office mails the check directly to the applicant.

If there is a major change in the approved program or time line for completion of the program, the applicant contacts the Education Consultant for approval of the adjustment.

6. The sister’s program of full-time study is recognized as ministry by the president on the annual commitment form.
7. Prior to receiving monies for the following term, the *Final Expense Report* must be completed before the end of each term. One copy is sent to the Education Consultant or her designate; one is sent together with any excess monies to the Congregational Business Office; and one copy is retained by the sister.

### ***Process for Non-program Study***

Non-program study is defined as:

courses or workshops which are not directly related to a degree or certification program but which provide opportunity for personal and professional development and continuing education for ministry.



*Procedure*

1. The applicant completes a “Request for Non-degree Program Study” funds and forwards it to the education consultant. The request should be received one month before the funds are needed.
2. The education consultant approves the request, signs it, sends one copy to the Congregational Business Office, and retains one copy. A copy is also given to the sister’s mission councilor.
3. The Congregational Business Office forwards the requested funds and one signed copy of the request to the applicant.
4. The applicant completes the *Non-program Study Expense Report*. One copy is sent to the educational consultant, one is sent together with any excess monies to the Congregational Business Office, and one copy is retained by the applicant.

**RENEWAL**

*Policy*

Each sister has the opportunity for and is encouraged to take renewal time.

*Guidelines*

1. The individual in consultation with her mission councilor plans her renewal.
2. Funding for renewal is available from the congregational budget.
3. Ordinarily, requests for renewal are made at least one year prior to the beginning of the renewal time.

*Definition*

Renewal is a time spent away from regular ministry to:

- recreate the whole person;
- discover/rediscover one’s self, personal gifts, values and ideals;
- review and integrate life’s experiences;
- slow down enough to discover new energy;
- open up to new experiences and challenges.

Renewal opportunities vary greatly in regard to length of time, type of program/activity, etc. A fruitful time of renewal requires planning so that the individual may discover what will meet her renewal needs.

*Revised January 2000*

## **RETREAT AND SPIRITUAL DIRECTION**

### ***Policy***

Each sister plans and budgets for her annual retreat and for spiritual direction according to her need.

### ***Guidelines***

1. Funds for retreat and spiritual direction are included in the house budget according to the individual need.
2. When unforeseen opportunities occur, additional funds from the Congregation may be requested from the mission councilor.

*Revised January 2000*

## **VACATION**

### ***Policy***

Each sister is encouraged to plan for vacation and to budget annually according to her need.

### ***Guidelines***

1. Funds for vacation are included in the house budget according to the need of the individual.
2. When unanticipated opportunities occur, additional funds from the Congregation may be requested from the mission councilor.

*Revised January 2000*

## **SUBSTANCE ABUSE AND ADDICTION POLICY**

### ***Policy***

We, the Sisters, Servants of the Immaculate Heart of Mary, acknowledge that alcoholism and drug dependency are diseases which affect some of our members. In accord with competent professional authority, we further acknowledge our obligation in justice and charity to establish procedures that will

facilitate treatment, encourage on-going recovery, and provide support for our dependent members.

*Adopted November 1985 by SSIHM Congregational Governing Board  
Revised 1993*

### *Background and Recommendations*

We reverence the dignity of each human person who has this disease. Our primary concern is to relieve pain and suffering, to restore health and dignity, and to assist our alcoholic/drug dependent sisters to return to vital community life and effective ministry.

We recommend the following:

- continuing education for members of the Congregation;
- familiarity with the effects of the dependency so as to assist one another in identifying the problem;
- recognition by all members of the Congregation of the responsibility to use the intervention process when a dependency is identified;
- consultation with professionals to assist the individual and the Congregation during the treatment and recovery period.

### ***Rationale***

1. Alcoholism is a disease, unambiguously stated as such by the World Health Organization (1951), the American Medical Association (1956), the U.S. Department of Health, Education and Welfare (1966) and the Cooperative Commission on the Study of Alcoholism (1967).
2. Alcoholism is no respecter of persons, affecting all groups (statistically 10% of all populations) regardless of sex, economic level, profession, religious affiliation or commitment. Persons so afflicted deserve compassion, not moral censure.
3. Alcoholism now ranks as the third major cause of death in the United States behind coronary heart disease and cancer. (National Institute on Alcohol Abuse and Alcoholism 1978)
4. Persons who live in a close relationship with the dependent person are affected in significant and predictable ways.
5. The disease manifests itself in a threefold impairment of body, mind and spirit, which, unless arrested, can lead to irreparable damage and even death. As it can be treated in any of its stages, it requires proper treatment just as cancer, diabetes, heart disease do, the sooner the better.
6. Extensive experience indicates that persons affected by this disease are usually blind to the developing symptoms in themselves and are rarely capable of self-help.
7. Drinking is socially acceptable, and the use of most drugs, with a physician's prescription or for self-medication, is legitimate. As a result, early recognition is difficult.
8. The fact that a doctor has prescribed a medication should not deter the Congregation from seeking help for a person when problems resulting from drug use become evident.
9. The pattern of respect for privacy operative in religious Congregations frequently

prevents those who recognize the disease from confronting the dependent person. This pattern delays necessary treatment while allowing the disease to progress.

10. Recovering alcoholics and drug dependents are unanimous in expressing gratitude for the intervention which led them to recovery.

### ***Recommended Procedures***

#### *Education*

Continuing educational opportunities will be made available to the members of the Congregation to improve understanding of alcoholism/drug dependency and ability to recognize symptoms of dependency.

#### *Identification*

A dependency problem can be identified when an individual's consumption of alcoholic beverages and/or mood-altering drugs impairs her interpersonal relationships and her community life, interferes with proper performance of her ministry, reduces her dependability, and/or affects her health. The effect of alcohol/drugs on the behavior and function of the individual, not the volume or frequency of use, is the criterion for identification.

#### *Intervention*

The members of the Congregation recognize their responsibility to use the process of intervention when a dependency problem has been identified.

Intervention is a process in which persons involved in an alcoholic/drug dependent person's life take direct, effective action in order to bring about participation in a recovery program. Persons involved include peers, appropriate leadership persons in the Congregation, and professionals qualified to make recommendations and to lead the intervention as well as to help those involved to follow through the entire process. On a case by case basis it may be wise to also include family members, employers and co-workers.

The individual's right to privacy precludes discussion of the problem with those not directly involved.

The method of intervention will depend upon individual circumstances.

There is no moral or medical validity in the old saying, "You cannot help an alcoholic/drug dependent person until he/she is ready to be helped."

Experience proves that direct confrontation substantiated with factual evidence is most successful. In confrontation, focus is on behavior, identifying such behavior as arising from the abuse of alcohol or drugs. In many instances, constructive coercion is necessary to bring the person to therapy.

All too often, peers and mission councilors have failed to intervene until it was too late to reverse some of the cumulative damage. Feedback regarding observed behavior should be given to the dependent person as the behavior occurs. The truth is part of the healing process.

The following formal intervention process (with professional guidance) is recommended:

1. Make a detailed list of observed behavior, linking evidence to the alcohol/drug problem. Each involved person should make such a list.
2. Arrange a practice session with significant others.
3. Pre-plan for excuses.
4. Be prepared for “what ifs.” (What if the person suggests psychiatry, counseling, leave of absence? How will you respond?)
5. Have a specific plan for recovery, including pre-arranged options for treatment.
6. Set a time to meet with the person when she is as free as possible from the influence of alcohol/drug.
7. Go through the intervention as planned.
8. Have the courage to repeat the process if necessary.

*Recovery: Treatment and Aftercare*

Consultation with professionals in the field of alcoholism/drug dependence will enable the Congregation and the individual to choose the most appropriate type of treatment.

After treatment, the individual must commit herself to involvement in an effective support system, such as Alcoholics Anonymous, in order to maintain an alcohol/drug-free condition.

Upon satisfactory completion of treatment, the individual is guaranteed full and equitable consideration in matters of ministry and community living.

Proper treatment must be personalized and will, therefore, vary in detail from person to person. Treatment will depend on such factors as duration of disease, degree of impairment, physical, psychological, and social-vocational complications, insight and motivation.

The first phase of the recovery process involves detoxification and physical stabilization. This is generally accomplished under medical supervision.

The second phase, which can take place in a variety of settings, such as hospital, clinic, treatment center, half-way house or Alcoholics Anonymous, includes opportunities to:

- learn about the disease of alcoholism/drug dependence;
- accept the reality that she is alcohol/drug dependent;
- identify the consequences of alcohol/drug abuse;
- make a commitment to an ongoing plan for maintaining sobriety or drug-free condition.

The third phase of the recovery process requires involvement in an effective support system. For those who accept their substance dependence without entering a treatment program, an aftercare plan can be developed in consultation with an AA sponsor or treatment counselor, and an appropriate leadership person in the Congregation.

### *Relapse*

Should a relapse occur, the alcoholic/drug dependent sister's ongoing program of recovery will be re-evaluated by the sister and appropriate members of the Congregation, as well as by professional counselors.

### *Refusal to Accept Treatment*

In the event of initial refusal to accept therapy as recommended after professional consultation, a more thorough evaluation of the sister will be required. The results of this evaluation may indicate the need for enforced curtailment of some activities until treatment is accepted, or more stringent measures in accord with accepted canonical discipline.

Implicit in these recommendations is the involvement of the local community, friends, family and co-dependents within the Congregation. Just as these persons have been affected by the disease, so too are they in need of education, counseling, and involvement in family programs for themselves as well as for the support of the dependent person.

### *Some Recommended Treatment Centers*

#### *Michigan*

Guest House  
P.O. Box 68  
1601 Joslyn Road  
Lake Orion, MI 48360  
248-391-4445  
[www.guesthouse.org](http://www.guesthouse.org)

Human Potential Center  
22 W. Second Street  
Monroe, MI 48161-2884  
734-241-0142

Maple Grove Treatment Center  
Henry Ford Hospital  
6773 West Maple Rd.  
West Bloomfield, MI 48033  
248-661-6100  
[www.henryford.com/maplegrove](http://www.henryford.com/maplegrove)

#### *Florida*

Hanley/Hazelden Center, Inc.  
5200 East Avenue  
West Palm Beach, FL 33407  
561- 841-1000  
[www.hazelden.org](http://www.hazelden.org)

#### *Maryland*

St. Luke Institute  
88901 New Hampshire Avenue  
Silver Spring, Maryland 20903  
301-445-7970  
[www.sli.org](http://www.sli.org)

#### *Minnesota*

Hazelden  
P.O. Box 11  
15251 Pleasant Valley Road  
Center City, MN 55012-0011  
800-257-7810  
651-213-4200  
[www.hazelden.org](http://www.hazelden.org)

#### *New Jersey*

Emmaus House  
80 Norwood Avenue  
Elberon, NJ 07740  
732-229-5834  
[www.emmaushouse.com](http://www.emmaushouse.com)

#### *Canada*

Southdown Institute  
1335 St John's Sdrd E RR 2 Stn Main,  
Aurora, ON L4G 3G8, Canada  
905-727-4214  
[www.southdown.on.ca/](http://www.southdown.on.ca/)

## **CONGREGATIONAL CELEBRATION OF IHM JUBILEES**

### ***Guidelines***

Each summer (usually on the last Saturday of July), the Congregation celebrates the jubilee of its sisters.

The jubilarians are those celebrating 25, 50, 60, and 75 years in the Congregation since the time of their entrance into the novitiate.

All IHM sisters and associates are invited for this day of socializing, prayer and festive meal.

Other persons invited are:

- former IHMs of the jubilee classes (invited at the option of the particular class),
- priests and religious relatives of the jubilarians (invited at the option of the individual jubilarian),
- other persons in the same residence as the jubilarian.

It is impossible to invite all those who would like to rejoice with the jubilarians. It is hoped that family, friends, pastors and employers of the jubilarians can be included in the private celebrations that take place for individual jubilarians throughout the year.

When the individual jubilarian and/or her family is unable to provide a private celebration, the jubilarian is invited to contact her mission councilor for assistance.

Well before the event, a member of the Leadership Council initiates the gathering of representatives of the concerned classes for the planning process.

*Revised 2011*

## **RETIREMENT PLANNING**

### ***Policy***

As members of the Church and of this community, we continue throughout our lifetime Jesus' liberating mission.

*IHM Constitutions, Article 9*

We acknowledge our own aging process and thus witness to the value of human life at all stages within our own IHM community and in the global community.

*IHM Directions, Assembly '87*

We celebrate the lives of older persons as sources of power and wisdom.

*IHM Directions, Assembly '87*

We stand against the stereotypes and discriminatory perceptions of the aging process, particularly of women, in our culture. We believe this to be a matter of justice.

Therefore, we are committed:

- to respect and foster each person's dignity, integrity, potential, and experience;
- to recognize that aging continues from conception to death uniquely, individually, not merely chronologically, and that the differentiation between persons increases as we age;
- to accept our need to adjust the proportions of work and leisure as our energy levels change;
- to struggle together to embrace the task of coping with loss, diminishment, and death;
- to embrace each other as our most valuable resource, cherishing each person as a unique creation of God, believing that her relationship with God continues to develop until death and beyond.

*Prepared in collaboration with the NACPA Third Age Study.  
Approved by SIHM Governing Board, October 1987  
Revised 1993; 2010*

### ***Policy Statements for the Process of Aging***

Both leadership and members will assume creative initiative in wellness education and respect for the processes of aging both within and beyond the Congregation.

Elected leadership and members will encourage one another to prepare a holistic life plan, including physical, psychological, social, ministerial, and spiritual needs, in sensitive balance with our congregational reality, global realities, and in solidarity with others.

### ***Ministry***

Ministry is a central feature of all apostolic religious, supported by community life and spirituality. To serve others, conscious of the gospel influence and its effect upon the people of God, not only makes personal demands but also offers a rewarding and meaningful life. Ministry is a lifelong call throughout all of life.

Each member initiates a periodic assessment of her ability to integrate work, community, and leisure. Normally, members work full time until age 70, unless there are some extraordinary circumstances. As a member is approaching her 70th birthday, she will discuss her future plans with her mission councilor. She will make regular needed adjustments in the face of physical and psychic diminishments and with the insights of co-workers, peers and her mission councilor.

### ***Questions for Reflection***

- What is your stamina and energy for your current ministry?
- What special needs/accommodations do you require?
- How many hours/week are you able to work?
- Have you begun to plan for your successor? How?



- Are you able to support yourself financially? If not, at what percentage?

### *Community Life*

- Are you responsible for the care of another? If so, who and where and how much?
- Do you rely upon others for your own care? If so, who and where and how much?
- Are you able to participate actively in a mission unit and in congregational events?

### *Housing*

Safe, adequate and supportive housing is an individual responsibility, discussed and planned with the mission councilor.

Insofar as possible, a sister lives in the milieu of her choosing, within the limits of the community's resources. She determines the appropriate timing for her move to the Motherhouse to meet her personal, ministerial, or health needs, and/or the needs of others in residence. All of these steps are made in consultation with the mission councilor.

### *Questions for Reflection*

- Is your current housing safe and attractive?
- Is it reasonably clean and neat?
- Have you observed any increase of clutter/hoarding?
- How much outside help do you need to maintain it?
- In the case of an emergency, do you have plans in place?
- Is the "IHM Emergency Form" completed and posted (or its whereabouts)?

When a sister recognizes changes, she initiates a consultation with her mission councilor. In the event that does not occur, elected leadership or other community members may need to take responsibility and to intervene in the decision-making process in order to assist the person to recognize her own particular needs.

In providing retirement options for sisters, the Motherhouse and the Health Care Center in Monroe will be given priority, as they are our permanent IHM home. With an environment for spiritual and intellectual stimulation, long-time relationships, a variety of supportive services, and licensed health care, we offer a unique and attractive home.

### *Transportation*

Transportation needs will be addressed by the individual sister and her mission councilor, both of whom will be attentive to adequacy, safety, availability, and equity of various modes of transportation. Guidelines in the transportation section indicate the norms for outside assessments when needed.

### *Finances*

Each sister participates in the budget process according to her local situation for housing, transportation and personal living costs. The Leadership Council provides guidance in choices in view of congregational resources and global realities.

## **BURIAL OF IHM SISTERS**

### ***Major Policy***

The Congregation provides for every sister's burial. It is the individual sister's prerogative to choose from among four methods of burial:

- burial of the full body with embalming
- burial of the full body without embalming
- burial of cremated remains with embalming
- burial of cremated remains without embalming

Procedures and rituals are formalized according to each sister's choices.

Currently, the IHM Congregational Cemetery in Monroe remains the usual site of burial for IHMs.

### ***Guidelines***

1. Each sister specifies in writing her choices for burial. The form, "Final Disposition of Body" follows the policy. Each sister is encouraged to discuss her choices with family, friends and/or her mission councilor before completing this form.
2. If a sister dies while in another country, it may be necessary to bury her there. A memorial liturgy will be celebrated for the sister in the Motherhouse Chapel and a plaque or marker placed in the IHM Congregational Cemetery. The name of the country where the sister's remains are buried would be put on the plaque or marker.
3. If a sister dies while in another country and desires to be buried in the congregational cemetery, it is recommended that her body be cremated before being returned to the United States. If at all possible, a member of the community will accompany the cremains home.
4. A sister missioned to another country is advised to discuss the eventuality of her burial in the country of her ministry with her mission councilor, her close IHM friends, and her family. A statement indicating that these discussions have taken place is kept in her congregational file.
5. Special requests for burial of others in the IHM Cemetery will be considered on a case by case basis with the approval of the Leadership Council.

*Reviewed by Coordinating Council, November 2007  
Revised and Approved by Leadership Council, October 2010*

**Final Disposition of Body**

I, Sister \_\_\_\_\_, a member of the Sisters, Servants of the Immaculate Heart of Mary of Monroe, Michigan, choose:

**Traditional Burial**

\_\_\_\_\_ to be buried according to the current traditional burial, including embalming and viewing, with the customary IHM Remembering and Rite of Christian Burial.

\_\_\_\_\_ to be buried according to the current traditional burial, with embalming but with no viewing (closed casket) and with the customary IHM Remembering and Rite of Christian Burial.

**Cremation**

\_\_\_\_\_ to be cremated with embalming and a viewing. I will be buried in the section of the IHM cemetery dedicated for this purpose. The congregation would hold the customary IHM Remembering and Rite of Christian Burial.

\_\_\_\_\_ to be cremated, but without embalming and viewing. I will be buried in the section of the IHM cemetery dedicated for this purpose. The congregation would hold the customary IHM Remembering and Rite of Christian Burial.

**Green Burial**

\_\_\_\_\_ to have a green burial in the section of the IHM cemetery dedicated for this purpose. This would include no embalming and very limited options for viewing. The congregation would hold the customary IHM Remembering and Rite of Christian Burial.

**Signed:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Witnessed by:**

1. \_\_\_\_\_ **Date:** \_\_\_\_\_

2. \_\_\_\_\_ **Date:** \_\_\_\_\_

Leadership Council Representative

IHMs are encouraged to inform relatives of the choices stated here.

## **RIGHT RELATIONSHIPS BOARD PROCESS AND PROCEDURES**

### **POLICY ON CONFLICT RESOLUTION**

The IHM Sisters have a conflict resolution process and procedure facilitated by the IHM Right Relationships Board. This policy is to be utilized when conflict cannot be resolved through normal human exchanges or through ordinary congregational procedures.

Jesus said to his followers: "If your sister or brother does something gravely wrong, go and point out the wrong just between the two of you. If that one hears you, then you have gained a sister or brother; if not, take with you two or three others, so that the entire matter may be established by the testimony of two or three witnesses.

If the sister or brother refuses to hear the witnesses, refer it to the gathered community ... Again I say to you, if two of you agree on earth about anything you ask, it will be done for you by God in heaven. For where two or three come together in my name, there am I in the midst of you."

*Matthew: 18: 15-20*

## **RIGHT RELATIONSHIPS BOARD PROCESS AND PROCEDURES**

### *Introduction*

Ordinarily, members of the Congregation are able to resolve conflict and reconcile differences through normal human exchanges or through ordinary congregational procedures.

However, within all human organizations there are moments when organizational policy lacks clarity, and implementation is confusing for the individual, or when there is a conflict of goals of the institution and the personal goals of the individual. There are also times when human interchange is so incompatible that individuals are unable to reach a truth which is shared in common. Ordinary institutional procedures have been tried and have not worked, or at least one of the parties involved lives with the perception that an injustice has been done. Some formal process is required to resolve the conflict.

The Right Relationships Board addresses this kind of extraordinary conflict by enabling formal and positive interaction between the parties in conflict. This process assumes that, even with our best intentions and efforts, painful conflict and decisions perceived as unjust do occur within the Congregation and that we need to have in place a formal means of dealing with them. It assumes that such conflict need not be destructive - that it can lead to greater life, fuller truth, and deeper trust when dealt with openly and fairly. It assumes, conversely, that to ignore or suppress such conflict can be violent to persons and community. It is consistent with our firm commitment to promoting just structures in both ecclesial and societal institutions.

It is our hope that the Right Relationships Board reflect feminist values, processes developed within our IHM faith context and a feminist/global/organic model. This Appeals Process is

aimed at "sharing the truth" as women. This process itself calls for conflicting parties to transcend the pain and struggle of the issue. The peer-to-peer discussion prompts organizational trust and cooperation that is conscious, deliberate, and purposeful on the part of all members. The conflicting interests are seen as a problem to be solved by mutual collaboration. It recognizes the necessity of searching for a solution responsive to the needs of both parties. The process aims at being circular rather than hierarchical, communal rather than individualistic, cooperative rather than competitive, nonviolent rather than violent, healing rather than hurtful, inclusive rather than exclusive. A new synergy could result from a win-win situation.

### *Some Basic Understandings*

1. The Right Relationships process provides for an honest recognition of conflicts and their causes. It is the hope of the Board that the use of educational resources and procedure will lead to greater unity and harmony in community.
2. Mutual trust is essential to the process and assumes a strong commitment to reflection and prayer.
3. The Right Relationships process is intended as an internal congregational process to address matters of perceived injustice, not a breach of charity or broken relationships.
4. Referral to the Right Relationships process may be made by any member or group of the IHM Congregation. Appeal may be made after the normal channels of human exchange and all ordinary congregational procedures have been exhausted.
5. The procedures of mediation and arbitration are not designed or intended to contradict the ordinary lines of authority established in the Constitutions.
6. Utilization of the Right Relationships process requires that BOTH parties to the conflict agree to participate.
7. Confidentiality MUST be maintained at all times in the process.
8. The Right Relationships process permits mediators and arbitrators to discuss the content of their proceedings with other members of the Right Relationships Board. However, it is understood that this information will be held in the strictest confidence within the Right Relationships Board.
9. In ministry-related conflict, the parties involved present their grievance through the appropriate channels in their place of employment. However, the Right Relationships Board is available for consultation in these matters.

### *Overview of the Right Relationships Process*

It is understood that the Right Relationships process is to be used to address matters of perceived injustice, not fragmented relationships or breaches of charity.

### *Advisory Services*

Any member of the Right Relationships Board can be contacted by a member of the Congregation to talk about her conflict and seek advice and/or resource material on conflict management/resolution.

### *Formal Process*

The Right Relationships Board within the Congregation comprises three levels of intervention: education, mediation and arbitration. It is understood that these levels of intervention are to be used in sequence.

- Education often brings clarity in conflict situations. We encourage the use of resource materials as found on our Congregational web site.
- Mediation provides a mediator for sessions in which both parties, in each other's presence, actively pursue steps toward resolution of the conflict and reconciliation.  
*Goal:* to assist the parties involved in arriving at voluntary agreement which resolves the conflict.
- Arbitration provides neutral evaluators whose majority decision is used to settle the conflict.  
*Goal:* to bring the conflict to settlement.

The Right Relationships Board members are responsible for implementing the various levels of the Right Relationships process. Mediation is the heart of the process and precedes arbitration, a rarely used tool.

### *Right Relationships Board Composition and Role*

1. The Right Relationships Board is composed of a chairperson and six members (including one elected leader of the Congregation). The primary role is to facilitate the mediation process within the Congregation. Members are objective listeners and clarifiers who possess skills in facilitating face-to-face dialogue and in helping persons involved deal creatively with conflict. The term of service is three years and is renewable for three consecutive terms.
2. The role of the Right Relationships Board is:
  - to provide advisory and consultative services to determine whether or not the conflict presented is a matter for the Right Relationships Board
  - to prepare an annual summary report for the Coordinating Council
  - to include areas of ongoing education and development within the Congregational website
  - to insure that a copy of the annual summary report is kept in the Congregational Archives
3. The role of a board member is:
  - to establish an atmosphere in which a cooperative process of conflict resolution can take place.
  - to provide careful listening and assistance in identifying and clarifying the issues.
  - to help surface alternatives to the problem situation

Membership on the Right Relationships Board is open to all members of the IHM Congregation.

### *Chairperson of the Right Relationships Board*

The chairperson is the official liaison of the Right Relationships Board and is appointed by the

Coordinating Council to which she is accountable, for a period of three years.

The chairperson is responsible for:

- devising and implementing a selection process for board members,
- orientation and updating of members,
- keeping all records,
- submitting an annual report to the Coordinating Council, and
- convening the Right Relationships Board as needed.

### *Advisory Services*

Prior to initiating the formal appeals process, a person or group is strongly encouraged to contact a member of the Right Relationships Board to obtain informal preliminary counsel regarding:

- assistance in informal conflict resolution and/or reconciliation;
- any questions the person or group may have about the Right Relationships process.

If the person(s) decide(s) to initiate the mediation process, possible outcomes of the preliminary consultation could be:

- the person(s) will clarify a way to handle the conflict and not leave the situation unresolved;
- the grievance party decides not to initiate the Right Relationships process;
- the person or group retains the right not to follow the advice given.

No formal records are kept of these contacts.

Parties involved in ministry-related conflicts present their grievance through the appropriate channels in their place of employment. However, the Right Relationships Board members are available for consultation.

### *Procedure for Mediation*

#### *Goal*

The goal of mediation is to assist both parties involved in their understanding of the issues in order to seek resolution of the conflict. When ordinary channels of congregational procedures have been exhausted, the conflict can be submitted for mediation. Mediation intends to provide opportunity and safe space for personal exchange; encourages each party to openly share and listen to each other's feelings, concerns and viewpoints; and helps each party analyze the conflict together.

#### *Matter*

The mediation process is available for use in matters of perceived injustice. It is open to professed members and persons in formation, transfer, and associate programs. For example, mediation may involve two IHMs needing to negotiate the use of a house or a community joint bank account. It may involve two members, a member and a group, or two groups.

### *Procedure*

1. The initiator contacts the chairperson of the Right Relationships Board who contacts the other party. Both parties must consent to enter the mediation. If this matter is to be referred out, the Chairperson of the Right Relationships Board and another member normally appoints an outside mediator acceptable to both parties. Her role is to remain a neutral observer of the situation and act as a guide toward conflict resolution.
2. In the case of one party choosing not to enter the process, the non-consenting party submits a written statement of her position.
3. If the conflict is resolved by voluntary agreement of both parties, the outside mediator(s) will prepare a summary report of the proceedings and a detailed description of the voluntary agreement for their personal records. This will be submitted for the approval and signatures of the parties. If the conflict is not resolved by voluntary agreement, a summary report of the proceedings will be prepared, signed by both parties, and mailed to the parties.
4. Records of the mediation procedure are to be placed in a confidential file kept by the Chairperson of the Right Relationships Board. This file will be destroyed after one year unless advised otherwise.
5. If outside mediation does not lead to resolution, either party is free to pursue arbitration. Generally, arbitration should be requested within two months after receiving the written summary from the mediator.

### ***Procedure for Arbitration***

#### *Goal*

The goal of arbitration is to provide neutral evaluators whose majority decision is used to settle the conflict. When mediation has been completed and found inadequate, the conflict can be submitted for arbitration. Arbitration allows each party to have representation, provides for formal hearings at which both parties present their positions, witnesses and evidence, provides time for questions and clarification, and renders a majority decision.

#### *Matter*

The arbitration process, available for use in matters of perceived injustice, is open to professed members of the IHM Congregation. Decisions relating to admission to vows, renewal of vows, final vows or dismissal of a member may not be brought to arbitration.

#### *Procedure*

1. Both parties must consent to enter arbitration, agree to the decision of the arbitration team, and sign an Arbitration Agreement. Without these consents, the process cannot go forward and is considered terminated. In the case of one party choosing not to enter the process, the non-consenting party submits a written statement of position.
2. The chairperson of the Right Relationships Board provides names of arbitrators if the mediator with whom the parties have met is not available or cannot be contacted.
3. The Chairperson in consultation with the Board will set a monetary amount to cover this process. Fees will be negotiated by the Board at the time of contracting with the arbitrator to help the two professed community members settle the conflict.



*FAQ and A: Policies, Procedures and Processes*

4. The arbitrator will inform the Chairperson of the Right Relations Board when the conflict has been successfully arbitrated.
5. The arbitration agreement remains confidential unless the parties agree in arbitration on a joint statement of disclosure. The process and timeline for disclosure will be agreed to by the parties as a part of the arbitration agreement.

A Mediator Resource List is available from the IHM Leadership Council Office, Mission Councilors or online at [www.ihmsisters.org](http://www.ihmsisters.org).

*The Right Relationships Board document was originally prepared using the following references:*

*LCWR Board of Reconciliation and Due Process  
Sisters of Charity of the Blessed Mother Appeals Process  
Appeal Process of the Religious Sisters of Mercy of the Union  
Conciliation Process of the Sisters of Providence of St. Mary, Indiana  
Conciliation Services of the School Sisters of St. Francis  
Savannas Hospital Grievance Process  
Conciliation Process of Chicago  
Christian Conciliation Service of Central Michigan  
Due Process Procedures for IHM Community Institutions*

*Updated 1993;  
Revised by IHM Right Relationships Board September 2010*

**RIGHT RELATIONSHIPS BOARD**

**AGREEMENT TO ENTER INTO MEDIATION**

Date:

Name:

Address:

Home telephone:

Ministry telephone:

Cell telephone:

E-mail:

How do I/we understand the nature of the conflict? Who is involved? How do I/we think the other party perceives the conflict? What steps have been taken to resolve the conflict? What outcome am I/we seeking?

I/We, \_\_\_\_\_ agree to enter a mediation process with \_\_\_\_\_ .

I/We \_\_\_\_\_ am/are committed to participate in the mediation session(s) in the hope that I/we and the above-named persons will be able to reach a voluntary agreement that will lead to a peaceful and just resolution of our conflict. We accept the following member(s) of the Right Relationships Board as mediators.

Signature(s) \_\_\_\_\_

PLEASE MAIL THIS FORM TO THE CHAIRPERSON OF THE RIGHT RELATIONSHIPS BOARD.

**RIGHT RELATIONSHIPS BOARD**

**AGREEMENT TO ENTER INTO ARBITRATION**

Date:

Name:

Address:

Home telephone:

Ministry telephone:

Cell telephone:

E-mail:

I/We, \_\_\_\_\_ agree to enter into an arbitration process with \_\_\_\_\_ .

I/We \_\_\_\_\_ am/are committed to participate in the arbitration session(s), and agree to the majority decision of the Arbitration Team. I/We are seeking the following outcome:

I/We would accept the following member(s) of the Right Relationships Board as arbitrators.

Signature(s) \_\_\_\_\_

PLEASE MAIL THIS FORM TO THE CHAIRPERSON OF THE RIGHT RELATIONSHIPS BOARD.

## **POLICY ON PHYSICAL OR SEXUAL ABUSE OF CHILDREN**

### *Introduction*

In our struggle to live the gospel today, we recognize our call to serve the needs of God's people not only through the traditional works of mercy, but also by working with others to eradicate the causes of injustice and oppression and to help create structures that will promote justice and peace and bring unity among all peoples. In a special way we are committed to the work of education, a ministry in which our community has been engaged for over a century.

*IHM Constitutions, Article 11*

The Sisters, Servants of the Immaculate Heart of Mary root their commitment in mission and ministry in the liberating message of Jesus. They are committed to the well being of those whom they serve, and such persons must be able to trust the sisters who minister to them in the name of God and of the Congregation. Accordingly, the IHM Congregation will make every effort to prevent physical or sexual misconduct by its members. Such misconduct is not only inappropriate and unlawful behavior, but also a violation of trust in a ministerial relationship.

If/when a member of the Congregation is reported to have engaged in such misconduct, the Congregation will take appropriate measures, as defined by this statement of policy and procedures, for responsible intervention. The intervention procedures are intended to protect the rights of all concerned parties while providing pastoral care for all.

### **POLICY**

The IHM Congregation is committed to respond immediately in a compassionate and responsible manner to any allegation of physical or sexual abuse of children by any member. In responding, the Congregation's first priority is the protection of the alleged victim without bias in regard to the alleged perpetrator.

*Approved by SSIHM Congregational Governing Board, April 24, 1994*

### **GUIDELINES AND IMPLEMENTATION OF POLICY**

#### *Principles and Values*

1. The Congregation is fully committed to preventing child abuse by its members.
2. The Congregation will respond to those making accusations of misconduct with compassion and pastoral concern.
3. At the same time, the Congregation will deal with those being accused in a fair and understanding fashion.
4. Confidentiality and discretion will be maintained to the fullest extent possible. Appropriate persons will be informed of the process according to their need to know.
5. All members of the Congregation are expected to promptly inform a member of the Leadership Council if they reasonably suspect that any member of the Congregation may have engaged in child abuse.

6. All members of the congregation will observe this policy.
7. Insofar as IHMs have influence or control over institutions or ministries, they are expected to work towards the implementation of these or similar policies.

### **IMPLEMENTATION OF POLICY**

1. The Leadership Council appoints an Intervention Team. Members include the president or her delegate, one mission councilor and two other members knowledgeable about personnel matters and issues of physical and sexual abuse.
2. The functions of the Intervention Team include:
  - a. To implement the Congregation's commitment to provide educational opportunities on the nature and scope of this policy as well as other related issues,
  - b. To establish a circle of consultors to assist in their tasks of developing procedures and addressing actual allegations. This circle will include, but not be limited to, legal counsel, mental health professionals, including as appropriate those knowledgeable about the subject of sexual disorders, and a person knowledgeable about congregational business affairs such as sponsorship, insurance, finances, etc.
  - c. To develop procedures for addressing accusations of physical and sexual misconduct. These procedures must attend to the:
    - 1) legal rights of the alleged victim and the accused,
    - 2) pastoral response to the alleged victim and the accused,
    - 3) assurance of confidentiality,
    - 4) communication with appropriate persons and with media if the case becomes public.

### *Procedures Regarding Allegations of Other Misconduct*

The above principles and procedures to be developed may be followed, with appropriate modifications, in response to other allegations of serious misconduct.

### *Prevention and Education*

1. All candidates for membership in the Sisters, Servants of the Immaculate Heart of Mary are screened through psychological evaluation, interviews, and reference checks.
2. The Congregation will provide educational opportunities and materials for members of the Congregation to help them recognize appropriate ministerial boundaries and prevent serious misconduct, especially in the areas of sexual abuse and exploitation.
3. The individual members are responsible to be cognizant of appropriate behaviors in relationships and to maintain integrity in all ministerial interactions.

### **Footnotes**

1. Abuse means harm or threat of harm through intentional physical injury, sexual abuse, sexual exploitation, or maltreatment. Sexual abuse includes any sexual contact, meaning the touching of the clothed or unclothed parts of a minor for sexual gratification. (State of Michigan Child Protection Law)
2. Child means a person under 18 years of age. (State of Michigan Child Protection Law)
3. Member is defined as stated in Canon 607. 2, as one who "pronounces public vows either perpetual or temporary" in the IHM Congregation.

# **IHM COMMUNICATIONS OFFICE**

## **COMMUNICATIONS POLICY FOR EXTERNAL AUDIENCES**

*The purpose of the IHM Communications Policy for External Audiences is to provide consistency in professional communications standards.*

All offices initiating or revising electronic and print materials will need to notify the Communications Office prior to publishing. This policy will include materials such as press releases, publications, flyers, periodicals, ads, web content, posters, etc.

This notification will begin a process of organizing communications work, tracking jobs, structuring reviews and approvals, and archiving costs, vendors, and resources.

The Communications Office needs advance notice – several weeks, or even months, for major projects and a few weeks on most others. Each job coming into the Communications Office will be assigned a job number. All jobs will be logged into a communications job system with the date of the project request. A folder with the corresponding log number will be filed, as will all information related to the project.

The Communications Office staff will be responsible for reviewing jobs to ensure the proper use of language and professional communications style guidelines; for the consistency in usage of the IHM logo, message and identity; and the adherence to professional graphic design principles, including proper use of color.

A representative from the office generating the project will be required to provide the following information:

- Purpose
- Audience
- Quantity (if the piece is to be printed)
- Deadline
- Budget/cost center (if outside costs will be incurred)
- Designated supervisor for content approval (sign-off)
- All data pertinent to each project will be filed and archived in the Communications Office.

### *Advertising*

To provide consistency in professional visual and written communications, all offices placing IHM ads in printed programs, newspapers, magazines and on electronic media need to work with the Communications Office in the preparation of ads.

While ads vary in size and specification, it is important to standardize format, fonts, text and visual imagery as much as possible. The Communications Office has developed a standardized ad and purchased specific fonts for specific components of IHM ads.

For assistance in design and production of ads, staff intending to place ads should meet with the IHM Communications Office staff at least two weeks before an ad deadline. Please bring ad specifications, approved text, photos or graphics, the placement deadline, your account number, ad costs or rate sheets and samples of the publication in which the ad will be placed to the meeting with Communications Office staff.

## **COMMUNICATIONS TEAM**

The purpose of the IHM Communications Team is to

- Provide an avenue for creative interchange and communication among various areas of IHM to achieve mutuality of vision and understanding of various marketing-communications needs.
- To assist in the development of a marketing-communications program.

The committee is composed of a representative from key externally oriented and leadership groups and offices such as Campus Spirituality, Membership, Development, Mission Integration, Leadership Council, Justice, Peace & Sustainability Office, Information Systems, Monroe Campus Long Range Master Plan and Communications.

This committee is responsible for identifying and prioritizing marketing-communications needs; using a consistent IHM message; reviewing and redefining the editorial mix for IHM periodicals; identifying target audiences; and determining communications tools and strategies to reach them. The marketing-communication program is to be based on desired outcomes from our targeted audiences.

## **WEBSITE**

When our current website was redesigned in 2005, one of the goals was to build a Web management structure for simple, efficient updating. The management structure now in use is a decentralized content management system. We have approximately 12 content providers who are responsible for keeping their own navigation section and pages updated. Each content provider makes changes to her/his pages and then notifies the Communications Office to review the changes. The Communications Office then publishes the edited page on the public side of the site.

The private side of the IHM website is not managed by the Communications Office; it is managed by the congregation.

## **MEDIA RELATIONS**

The Communications Office works with editors, reporters, news directors and assignment editors in all realms of media. When the office is notified of a special event, news appropriate or geared toward a general public or targeted audience, we gather information from a specific office or an individual, write news releases, advisories and tips for print, electronic and broadcast media.

The office has developed several distribution lists to receive news releases – from general public to Catholic media, from environmental to justice-based media and organizations, and from spirituality periodicals and organizations to local, regional and national editorial outlets.

Most periodicals require three weeks lead time to publish events and to consider assigning and writing a news story for publication. Therefore it is important to notify the Communications Office well in advance of events and potential news items in order to allow for the gathering of facts and pertinent information. This information is then written, edited, reviewed and approved prior to distributing news to any media outlet.

For major media campaigns, the Communications Office should be notified a few months in advance to prepare a strategy, plan, appropriate distribution lists and/or targeted national reporters and editors.

No member of the congregation or IHM employee is authorized to speak to the media on behalf of the congregation unless the Leadership Council and the Communications Office have designated an individual as spokesperson.

For public statements issued by the congregation, please see *Section A2. Ministry/Justice, Congregational Stances*.

## **CRISIS COMMUNICATIONS PLAN**

The IHM Crisis Communication Plan provides guidelines for communicating to IHM stakeholders/publics and the media during a controversy or crisis. A condensed version of the plan follows. Each department on campus has received the full IHM Crisis Communications Plan.

### **IHM CRISIS COMMUNICATIONS PLAN**

The IHM Crisis Communication Plan provides guidelines for communicating to IHM stakeholders/publics and the media during a controversy or crisis. The basic causes of a crisis fall under four general categories:

1. Natural disasters (storms, earthquakes,
2. volcanoes, etc.)
3. Mechanical problems (ruptured pipes, metal fatigue, etc.)
4. Human errors (the wrong valve opened, miscommunication about what to do, etc.
5. Management decisions/indecisions (the problem may or may not be serious.)
6. Conflict of values
  - Controversies and crises can be sudden or smoldering, such as
  - Catastrophes
  - Lawsuits
  - Discrimination
  - Employee dismissal
  - Labor disputes



- Mismanagement
- Sexual harassment
- Whistleblowing
- White collar crime
- Workplace violence
- Casualty accidents

*Why a crisis communications plan?*

Everything we do in responding to a crisis today is in a “fish bowl.” Thus the quality and speed of our responses become meshed with the triggering event. With the live nature of reporting on crises, the media move within an hour to analysis – of what the incident means, what impact it will have, etc. The media appetite for information is huge. Media must be “fed” regularly or they can quickly turn against us. A lot of our capability rests with advance planning. Good crisis managers do not react; they anticipate.

*Crisis Communications Team*

The Crisis Communications Team (CCT) is the group that assembles immediately upon becoming aware of a crisis or controversy. The team assesses the situation, decides what and how the information will be released and determines the spokesperson. Members include:

- Leadership Council
- Director of Communications

Depending on the level of crisis, it may also be necessary to include

- Residents’ Administrator
- Campus Administrator
- Health Care Administrator
- Legal counsel
- Ad hoc staff or members with key information

*Crisis Procedure - initial two hours*

- Contact CCT immediately and convene a meeting.
- Contact switchboard supervisor and give clear directions for their responses to inquiries.
- Gather all information and sort it into three categories: known, unknown, presumed. Our goal is to move everything into the known category as the facts are confirmed.
- Assess crisis level.
- Determine if legal counsel is necessary.
- Determine spokesperson.
- Brief spokesperson on the facts as they are known.
- Establish a crisis control center, if necessary.
- Develop an approval process for statements.
- Identify publics and media to receive a response and the order and means of

dissemination.

#### *Prepare a response strategy*

- Communications director assesses how the media may play the story.
- Prepare a brief statement releasing only confirmed facts. If it is a continuing situation, the spokesperson assures the media and key publics of regular updates. A prepared statement explaining who the IHM Sisters are and the kind of work we do will also be available.
- Before interviews, develop key message to communicate.
- Develop talking points.
- Anticipate questions and rehearse.
- Decide if it's necessary to hold a media briefing.
- If the communications director is not the spokesperson, the communications director must be kept informed of all contacts with the media and other publics.

#### *The Response*

- Respond to every media inquiry. If we are not prepared to respond immediately, indicate we will get to them within 10 minutes: TV first, then radio, then print. Hang up and collect thoughts before returning calls.
- Acknowledge responsibility as quickly as possible. Avoid speculation.
- Never lie. Never conceal the truth.
- Be forthright. Say what you know, apologize for our mistakes.
- Do not say "no comment." Do not babble.
- Never go off the record.
- Don't use jargon.
- Remember our real audience, the public, not the media.
- Monitor all media to ensure accuracy.
- Establish a media log. Track who contacted us, from what outlets, what we've promised them, what their deadlines are, and how we plan to follow-up.
- Express concern and caring.
- Keep communicating.
- Focus all calls on one spokesperson.

#### *Post-crisis evaluation*

- Evaluate the team's response.
- Review the media coverage we received and file.
- Follow-up with media contacts. Give media feedback.

#### *Key publics*

- Congregation
- Associates
- Staff
- Ministry workers
- Family members
- Church officials, archdiocese

- Donors, friends
- Patrons
- Partner organizations
- Community leaders
- Elected officials (Monroe city, county, state, congressional)
- Media

#### *Crisis Control Center*

Ideally a crisis control center can be set up in D-102, which is in close proximity to the Leadership Council and the Communications offices, should a large area be necessary. If the crisis requires a press briefing, the spokesperson should be set apart – at the head of the table or at podium. If it becomes necessary to accommodate media interviews, the Leadership Council Conference Room can then be designated for that purpose.

#### *Bibliography*

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“Crisis Communications” lecture series by McLoughlinMedia, Inc. 2005

“Crisis Management: What Could Bring the Press to Your Doorstep?” by Norm Anderson, Cyber Papers – Crisis Management

“Crisis Plan,” Sisters of St. Joseph of the Third Order of St. Francis

“Have you checked your crisis plan lately?” *Media Relations Report*, Lawrence Ragan Communications, Inc., Chicago

“How Can You Survive a Crisis? Plan On It!” by Neal Yokota, Stryker, Weiner & Yokota, Honolulu, Hawaii

LCWR Crisis Communications Checklist

“Surviving Hurricane Katrina – Disaster Recovery,” by Charles Pizzo News, Plan, Texas

“Why Some Crisis Plans Miss the Boat,” by Tim O’Brien, O’Brien Communications

## IHM DEVELOPMENT OFFICE

### MISSION

The mission of the department is to advance the mission of the Congregation by garnering financial resources and promoting personal involvement in support of IHM life and ministries, primarily from our external publics.

### MINISTRY

It is important to note that while the goal of the department is financial, the focus and priority of the department is to enhance relationships. We are not simply seeking new donors. We are seeking new and deeper relationships. It is also important to note that to IHM, fundraising is the act of proclaiming our beliefs in such a way as to offer people an opportunity to partner with IHM in our vision and mission. This partnership is not only for the wealthy. Whether a potential or current donor has much or little is not as important as the possibility that they will find meaning in making money available for the community to use in service of God's people. To quote the late Henri Nouwen,

“From the perspective of the gospel, fund-raising is not a response to a crisis. Fund-raising is, first and foremost, a form of ministry. It is a way of announcing our vision and inviting people into our mission.”

“Fund-raising is precisely the opposite of begging. When we seek to raise funds we are not saying, ‘Please, could you help us out because lately it’s been hard.’ Rather, we are declaring ‘We have a vision that is amazing and exciting. We are inviting you to invest yourself through the resources that God has given you—your energy, your prayers, and your money—in this work to which God has called us.’”

*Henri Nouwen. The Spirituality of Fund-Raising. 2004*

When we approach fund-raising in this way, we are saying to our donors that we will take their resources and invest them in our vision only if it provides meaning to the donors in such a way as to enhance their spiritual health. We would never want donors to harm themselves by helping us. In other words, we are calling them to a richer experience of life through their generosity. Then we can declare as the Apostle Paul does:

“You will be enriched in every way for your generosity.”

*2 Cor. 9:11*

### *Means*

Development efforts are focused in three areas:

1. *Annual Giving* (annual direct mail appeals, parish appeals for overseas missions, memorial and tribute gifts, events, and other mailings.) Annual Gifts are usually made from a donor's discretionary funds (i.e., checkbook).
2. *Major Gifts* (special gifts made toward a project, or given after some discussion and interaction. Often after a personal request is made of the donor or a grant application has been made of a funder.) Major gifts are usually made from a donor's assets, such

as appreciated stock.

3. *Planned Gifts* are donations structured and planned over time such as bequests, annuities, trusts, and insurance policies. Anyone who makes or indicates that they plan to make a planned gift is welcomed into our “Future of Hope Society” by which the Congregation recognizes these special donors.

## **GIFT ACCEPTANCE POLICY**

In order to protect the interests of the Sisters, Servants of the Immaculate Heart of Mary and the persons and other entities who support its programs, a guidebook of *Gift Acceptance Policies* was established in April, 2006. These policies are designed to assure that all gifts to, or for the use of, IHM Sisters are structured to provide the maximum benefits to all parties. Additionally, the goal of the Gift Acceptance Policy is to encourage the funding of IHM Sisters without encumbering the Congregation with gifts that may prove to generate more costs than benefits or are restricted in a manner that is not in keeping with the goals of IHM Sisters. Therefore, the IHM Sisters reserve the right to accept any gift. The final authority to accept gifts rests with the SSIHM Board of Directors. This gift acceptance policy is available in complete form from the Development Office.

### *Office operations*

At present, the Development Office is located on the Monroe Campus on the main floor of the Motherhouse, near the Communications Office.

The Development Office is a member of the Office of Congregational Advancement, (OCA) a collaborative group of departments which function as representatives to our publics. (The OCA meets regularly, and includes representatives from Leadership, Communications, Membership, Development and Mission Integration.)

### *Coordination of Philanthropic Requests and Activities*

Philanthropy is a response to caring about someone or some cause, and it cannot be controlled by those outside of the relationship. However, even though the generosity of our audience and our members is a free and independent act of kindness, the effectiveness of our organization’s development and fund-raising activities can be maximized by an organized, strategic and thoughtful approach to opportunities to receive and make gifts.

The term, ‘asks’ refers to requests for support of some kind. It is important that an organization coordinates “asks.” Asks can come in the following ways:

- Asks of our donors on behalf of our sisters.
- Asks of our sisters on behalf of our sisters.
- Asks of the community on behalf of our sisters.
- Asks of any of donors, sisters, or community on behalf of a third party.

Communicating and coordinating the making of asks assures that we are matching the most appropriate solicitor, timing, opportunity and purpose to what we know about the prospective donor. This also allows us to provide the best relational experience for our donors because it eliminates the possibility that they will receive multiple asks for different IHM or IHM supported

giving opportunities at the same time or an excessive number of asks in a given period of time. It also helps prevent the possibility that a gift which was being pursued for one campaign or purpose is not re-directed to an alternate fund or project. If generosity is diverted from key needs to other important yet not budgeted or planned opportunities, it can reduce the benefit to our organization.

When making gifts to third parties that we support through our budget or by asking for internal or third-party support it is also important to coordinate. A coordinated plan for helping others insures that the finite philanthropic dollars and energy that IHM can offer to the community are spent in a strategic and balance manner.

*Important annual events and appeals:*

- Ministry Appeal mailing (May)
- Royal Blue Classic and Royal Blue Open golf events (June)
- Alumni Appeal mailing (Summer)
- Retirement Raffle Sister ticket sales (July)
- Retirement Raffle mailing (August)
- Donor Appreciation Gathering (October)
- Retirement Appeal mailing (November)
- Christmas card mailing (December)
- Planned Giving Appeal (customized)

Please note that all constituents do not receive every appeal.

## **FREQUENTLY ASKED QUESTIONS**

*How can donors make memorial gifts?*

Whenever possible, the development office supplies special envelopes to the funeral home, especially when a family has specified that memorial gifts should be directed to IHM. When the funeral is held at the Motherhouse, these special envelopes are on hand and are dropped off at the development office. The family contact for the deceased is provided with a list of donors who make gifts to IHM in memory of their loved one. The amount of each gift is not normally disclosed. Typically, memorial gifts are designated to the IHM Retirement Fund.

*How does the IHM Sisters' Raffle work?*

Raffle tickets are printed each June and are available to IHM Sisters and Associates in early July at no advance cost. Sisters and Associates have the opportunity to sell raffle tickets to their personal contacts throughout the month of July prior to the development office raffle appeal mailing, which is sent to donors in early August. Sisters and Associates who choose to sell raffle tickets should return the stubs and the funds, together, to the development office, as well as any unsold tickets. The first drawing is held the third Wednesday of October and monthly drawings are held on the third Wednesday of each month through June. At each drawing, two special drawings are held to award a prize of \$25.00 to two IHM Sisters or Associates who have been listed as the seller of a raffle ticket or tickets. Every ticket that is pulled is returned to the raffle barrel before the next pull, so that all tickets are always in the barrel when a ticket is drawn. Each ticket has 144 chances to win. Over \$10,000 is awarded in

prizes each raffle season. Funds raised through the IHM Sisters' Raffle support the IHM Retirement Fund.

*What happens if a Sister or Associate refers a potential donor to the development office?*

Donors and potential donors are treated gently and respectfully. Every effort is made to provide opportunities for giving to the IHM Sisters which are consistent with donor values and priorities. By listening to what is important to them, we are able to create moments which are meaningful and enriching for donors. Confidentiality is a key in development and the personal information regarding a donor and their gifts are closely guarded. Those who choose to make gifts to the IHM community receive prompt acknowledgement for tax purposes in accordance with IRS regulations. In some cases, donors receive personal thank you calls from members of the Leadership Council, or from volunteer sisters in the development office. The IHM congregation is a 501 (c) 3 nonprofit, and is listed in the Official Catholic Directory.

*What happens when a sister donates a gift made to her to the congregation?*

When a donor makes a gift directly to an IHM Sister, that gift is not deductible under the law and the development office does not provide a tax receipt for the gift. In these cases, the sister who chooses to share a gift made to her with the congregation is considered the donor. If a donor requires a tax receipt, it is important that they make their gift payable to the IHM Sisters, rather than payable to a particular sister.

*In what ways can a donor restrict their gift?*

At present, donors can restrict gifts to the IHM Retirement Fund, the IHM Ministry Fund, Operations, Overseas Missions, Area of Greatest Need, and the IHM Chapel Preservation Fund.

*How are donors recognized and celebrated by the IHM community?*

In addition to thank you letters and phone calls, a special donor gathering is held each October for invited guests who have supported the congregation in the prior year. Major gifts are recognized and commemorated on a special donor recognition wall installation near the Triple Dining Room in the Motherhouse. Five giving societies are in place for the following cumulative giving levels:

<i>Louis Gillet Society</i>	Over \$100,000 in cumulative gifts
<i>Theresa Maxis Society</i>	\$40,000 to \$99,999 in cumulative gifts
<i>Teresa of Avila Society</i>	\$25,000 to \$39,999 in cumulative gifts
<i>Alphonsus Liguori Society</i>	\$10,000 to \$24,999 in cumulative gifts
<i>Future of Hope Society</i>	A commitment to making a planned gift to IHM

Development partners include these IHM groups:

- Office of Congregational Advancement
- Congregational Business Office
- Communications Office
- Communications Team
- Royal Blue Classic Committee
- IHM Volunteers

The IHM Development Office welcomes the partnership of volunteers from among the Motherhouse Sisters. For more information, contact the Director of Development.

## CONGREGATIONAL RECORDS

### CHANGE OF CONTACT INFORMATION

An accurate and current list of the address and phone number for each sister is kept in the office of the general secretary.

When a change of address or phone number occurs, the information should be sent to the general secretary on the Directory Information Form, which contains the following items of information:

- First and Last Names
- Suffix (Relationship to IHM)
- Full Home Address
- Home/cell Telephone
  
- Diocese and Diocese State
  
- Month, Day and Year of Birth
  
- Ministry Category
- Ministry
- Ministry Place
- Ministry Address
- Ministry City, State, Zip Code
- Ministry Telephone
- Ministry Diocese and State

### CHOICES FOR LIFE THROUGH DURABLE POWER OF ATTORNEY FOR HEALTH CARE

One of the most difficult decisions made necessary by medical technology is whether to sustain life in the face of severe, irreversible illness. Two questions generally arise in this context:

*Who should decide?*

*What standards should the decision makers use?*

In this sensitive, delicate area, the Durable Power of Attorney for Health Care can facilitate our choices for life.

We have developed our own Durable Power of Attorney for Health Care because, as vowed women religious, we are in the unique position of having a religious community to whom we can turn in times of crisis. The unique thing an IHM may say in this instrument is, "Turn to my religious community, not my family of origin, to know my wishes." Usually health care providers will look to family for decisions when individuals can no longer make these decisions for themselves. Yet for the religious, a member of the Congregation is generally the one looked to for decision making.



Included with the Durable Power of Attorney for Health Care are some materials that may assist in completing the document. The Questions and Answers on Durable Power of Attorney Under *Public Act 312* and *A Step by Step Guide to Establishing a Durable Power of Attorney in Michigan* are both from the booklet published by the Michigan legislature, "Ensuring Medical Choices."

The following directives are for the State of Michigan. They may be applicable for your state/country. If not, please research and complete the necessary documents for your area.

Although it is your decision to complete a Durable Power of Attorney for Health Care, you are encouraged to do so for your own benefit as well as for the peace of mind of your friends and family. You may name as your agent anyone you wish.

### *Life-Sustaining Measures*

Anyone completing a Durable Power of Attorney for Health Care is free to indicate the medical procedures she would or would not want done when she is terminally ill. On the IHM form this is done in the Optional section under the words: "My wishes concerning care are the following...."

Anyone who chooses not to name procedures in the Option section leaves her Patient Advocate responsible for making a decision regarding medical procedures. The patient's condition and her desires regarding life-sustaining measures guide the patient advocate in this situation.

The four life-sustaining measures most frequently considered are:

1. Cardiopulmonary resuscitation (CPR)

This procedure involves applying pressure on the chest to start the heart pumping again. Air is forced in and out of the lungs through mouth-to-mouth breathing. This procedure, usually performed in the event of a cardiac or respiratory arrest, has saved many lives.

2. Mechanical breathing (respirator, ventilator)

This procedure allows a machine to breathe for a patient when the person is not able to breathe without assistance. After some surgeries, a respirator or ventilator is a standard temporary procedure.

3. Artificial methods of nutrition or hydration

Intravenous tubes (IV tubes) are used to provide fluids. Two methods used to feed a patient who cannot take in food orally are:

- a. a small tube placed through the nose to the stomach (NG tube);
- b. a tube placed directly in the stomach through the abdomen.

4. Antibiotics

Antibiotics are medications used to treat or prevent infections. They can be administered orally, by injection or through an IV line. Infections tend to develop in the lung or urinary bladder when a person is already ill.

Antibiotic therapy can restore the patient to her pre-infection level of health. For a terminally ill person who is being given comfort measures only, antibiotics may be

withheld if the patient so chooses.

In all cases, it is wise to ask about the side effects of any antibiotics.

The above is offered to assist a person in making an informed decision regarding her health care. As stated above, the procedures are beneficial in many situations. However, when a person is terminally ill, these same procedures may prolong the dying process and reduce the patient's quality of life.

No one is required to indicate her preferences or non-preference for any or all of these procedures in her Durable Power of Attorney for Health Care.

*Questions and Answers on Durable Power of Attorney Under Public Act 312 as Prepared by the Michigan Legislature (Amended for IHM use)*

- *What is a Durable Power of Attorney for Health Care?*

A Durable Power of Attorney is a document in which you appoint an advocate to make health care, custody and medical treatment decisions if you become unable to do so.

- *How does it work?*

After you talk to family, friends and your physician about your health care wishes, designate someone you trust to be your patient advocate. Fill out the form in the presence of two witnesses, sign it and have the witnesses sign it.

Your advocate cannot make a health care, custody or medical treatment decision on your behalf unless your attending physician and another physician or licensed psychologist determine that you are not able to do so.

- *Who can establish a Durable Power of Attorney for Health Care?*

Anyone who is 18 years old and competent may establish a Durable Power of Attorney for Health Care.

- *Can I appoint a person to manage my financial affairs in a Durable Power of Attorney for Health Care?*

A person appointed in a Durable Power of Attorney for Health Care is allowed to make only health care decisions, arrangements for medical services, and related decisions.

- *Why is the Durable Power of Attorney Law needed?*

Health care providers have available to them modern medical procedures to save lives and relieve suffering. However, these procedures may, in effect, prolong the dying process. If you lose your decision-making abilities, a physician may not know whether you want to exhaust every medical alternative, or whether you want to accept only medical treatment that would ensure comfort, and not prolong the dying process.

With a Durable Power of Attorney, your advocate can express your wishes on your behalf. Thus, your physician will know whether to perform a modern medical procedure, or withhold or withdraw treatment and thus allow you to die.

- *Is this a "right-to-die" law?*

You may authorize your advocate in your Durable Power of Attorney to withhold or withdraw

treatment, allowing you to die. You may also authorize your advocate in your Durable Power of Attorney to exhaust every medical alternative including experimental medical procedures which would prevent or slow down the dying process. Your advocate could also make routine care, custody and treatment decisions.

Therefore, this is a “right-to-determine-your medical-treatment” law. Whether you choose to have dramatic life-sustaining treatments withheld or withdrawn, or whether you choose to exhaust every medical possibility to prolong your life, or whether you merely authorize your advocate to make routine decisions, you have a right to determine your care, custody and medical treatment. This law is a way for you to make sure that your wishes are honored if you lose decision-making abilities.

- *I know that my advocate may make a decision to withhold or withdraw life-sustaining medical treatments if I permit my advocate to do so. What other kinds of decisions will my advocate be able to make?*

You may permit your advocate to make routine medical care and custody decisions like dressing, eating and taking medications. Consider your options carefully and discuss with your advocate the kinds of care and custody you want if you lose decision-making abilities.

- *If my advocate makes a decision to withhold or withdraw treatment, and I die, will my advocate be charged with assisting a suicide?*

Refusing life-sustaining treatment is not considered suicide in Michigan; and withholding or withdrawing treatment, thus allowing you to die, is not considered assisting a suicide under Michigan law. Therefore, your patient advocate cannot be charged with assisting a suicide.

**To protect you and your advocate, you must specifically state whether you would want treatment withheld or withdrawn to allow you to die.**

- *Are artificial nutrition and hydration medical treatments that I may authorize my advocate to withhold or withdraw?*

Artificial nutrition and hydration are generally considered life-sustaining medical treatments. Under this law an advocate may withhold or withdraw a medical treatment which could or would allow you to die, including artificial hydration and nutrition. **If you wish this step to be considered by your advocate, you must authorize it in writing and acknowledge that you understand such a decision would allow you to die. There has been quite a bit of controversy over this issue. You may want to be aware of the consequences of such a decision and clearly indicate your wishes regarding withholding or withdrawing artificial nutrition and hydration in your Durable Power of Attorney.**

- *Must I have a Durable Power of Attorney for Health Care?*

No. Establishing a Durable Power of Attorney for Health Care is completely voluntary. Neither a health care provider nor an insurance company can require you to have a Durable Power of Attorney as a condition for treatment or coverage; to do so is a violation of the law.

- *Do I need an attorney to fill out the form?*

No. Anyone can establish a Durable Power of Attorney without an attorney. Review the attached step-by-step guide.

- *Should I use the enclosed form?*

This form is a Durable Power of Attorney form which meets the requirements of Michigan law.

- *What should I do with my Durable Power of Attorney after it is signed and witnessed?*  
 Make it part of your medical record by giving it to your doctor. Give an original signed copy (not a photocopy) to your advocate and a copy to:
  - successor advocate (person(s) who act as your advocate(s) if the first person is unable to do so when the time comes);
  - mission councilor;
  - general secretary of IHM;
  - family members; pastoral care team (if a resident of Motherhouse Resident Community or IHM Health Care Center);
  - Health Services Administrator (if a resident of IHM Health Care Center);
  - keep a copy for yourself.
  
- *Why do I need two witnesses?*  
 The two witnesses confirm that you are signing the Durable Power of Attorney voluntarily and under no duress, fraud or undue influence. Under Michigan law, a physician is not compelled to adhere to your Durable Power of Attorney unless two witnesses sign it. The two signatures indicate that you signed it voluntarily, under no duress, fraud or undue influence.
  
- *How does this law affect physically disabled persons?*  
 This law affects disabled individuals the same way it affects those who are not physically disabled. Under no circumstances is a physically disabled person obligated under this law to establish a Durable Power of Attorney. If a disabled person desires to establish one, then by all means, she should write a Durable Power of Attorney to ensure that if she loses decision-making abilities, then a trusted advocate would make health care, custody and medical treatment decisions on her behalf.
 

Physically disabled individuals may have a special reason to use a Durable Power of Attorney for Health Care. People who poorly understand what it means to live with a disability, including many physicians, may make medical care choices on behalf of the disabled which are different from what disabled persons would make for themselves. A Durable Power of Attorney offers the assurance that you may choose an advocate who truly understands your lifestyle and your values.
  
- *How does this law affect minors and mentally ill patients?*  
 This law has no effect on minors or mentally ill patients. Minors are unable, under Michigan law, to enter into contracts of any kind, including the Durable Power of Attorney for Health Care.
 

Mentally ill patients cannot establish a Durable Power of Attorney for Health Care since a condition of the Durable Power of Attorney is that the individual must be of sound mind. If there is any dispute as to whether the patient was of sound mind at the time of the designation, then an interested third party may bring the issue to the probate court for a determination.
  
- *Can I change my Durable Power of Attorney?*  
 You can revoke your Durable Power of Attorney at any time and in any manner in which you are able to communicate such an intent. If you choose to appoint a different advocate or make any other changes, then you simply establish a new Durable Power of Attorney indicating your wishes. Your previous Durable Power of Attorney becomes ineffective on

the date of signing a new Durable Power of Attorney.

- *Is there a procedure to ensure that my advocate is acting according to my expressed wishes?*

Yes. An interested individual who believes that your advocate is not acting according to your wishes may file a petition with the probate court in the county in which you reside.

- *Is there anyone who may not be appointed as my advocate?*

You may not appoint anyone who is younger than 18 years old.

- *What is the Patient Advocate Acceptance form?*

Your patient advocate must acknowledge his or her rights and responsibilities as your patient advocate before he or she can make decisions for you. If your advocate chooses not to sign the form, then your Durable Power of Attorney designating this individual may not be honored. You should also make this advocate acceptance form a part of your medical record with your Durable Power of Attorney. It is best to make the acceptance form and the Durable Power of Attorney form parts of your medical record at the same time.

- *When does my advocate act on my behalf?*

Your advocate starts to make decisions when you lose decision-making abilities. That time is determined by your attending physician and a second physician or licensed psychologist. Then the person you named will have the authority to work with your doctors or other caregivers to make the same decisions that you would have made for yourself, within the limits you set in your Durable Power of Attorney document.

- *When does my Durable Power of Attorney go into effect?*

The Durable Power of Attorney becomes effective as soon as it is signed and witnessed. The patient advocate signs the acceptance statement and the documents are inserted in your medical records.

- *What is the difference between a Durable Power and a Living Will?*

The Living Will and the Durable Power of Attorney are both forms of "Advance Directives." Advance Directives are means of assuring that your wishes regarding health care are honored by health care providers if you lack decision-making abilities.

With a Durable Power of Attorney, you appoint someone you trust to make decisions on your behalf. With a Living Will, you specifically state what type(s) of treatment you want or do not want if you become unable to express your wishes. With a Living Will, however, you do not appoint someone to make those decisions for you.

*Excerpt from "Ensuring Medical Choices: Michigan Durable Power of Attorney for Health Care."*

## **DEATH NOTICE**

The Congregation is informed when a death occurs among the following:

- IHM sisters
- former IHM sisters
- Associates
- immediate family members of living and deceased IHM sisters; associates; and former IHM sisters.

A telephone call giving details of wake and funeral arrangements is made to the Leadership Council Office. The information is then sent to IHM Communications and forwarded to the community via electronic mail.

## **EMERGENCY INFORMATION**

Emergency cards for each sister are kept on file: a white card in the office of the general secretary, a yellow card in the office of the mission councilor, a green card at the local level.

The emergency card enables a responsible person to make an immediate contact with a sister's family if and when the occasion warrants it. The sister decides who she wants listed on the card.

Cards can be obtained from the general secretary when the information on file is outdated or needs to be changed.

## **RECORDS**

An individual's records are kept on file with the following Congregational areas:

*a) On file with the General Secretary:*

Apostolic Commitment Form	Permanent record
Durable Power of Attorney for Health Care	Current record
Durable Power of Attorney for Financial Affairs	Current record
Personal Record (information regarding family, etc.)	Permanent record
Emergency Information	Current record
Personal Documents of Sisters (Birth and Baptismal Certificates, Vow Commitments, etc.)	Permanent record

*b) On file with the Education Office:*

Education Records as part of the Current Record
Transcripts, Degrees, etc.as part of the Permanent Record

*c) On file with the Congregational Business Office:*

Copy of Health Insurance Card	Current record
Patrimony and Wills	Permanent record
Publications by Sisters (royalty agreements)	Permanent record
Copies of Federal, State and Local Income Tax Filed	Permanent record
Cancelled Checks on Income Tax	Permanent record
Pension Plans and Life Insurance	Permanent record
Medical Payment Record	Current record
Social Security Benefits	Permanent record
Car Record (titles, etc.)	Current record
Update Information Sheet	Prior year; Current

*d) On file with the Mission Councilor's Office:*

- Emergency Information Card
- Durable Power of Attorney forms

House records are kept on file with the following Congregational areas:

*a) On file with the Congregational Business Office:*

Monthly Accounting Report	Full Prior Year; Current Year
Monthly Reconciliation Sheet	Full Prior Year; Current Year
Year-end Accounting Report	6 Years
House Inventory	Original; Additions/Deletions
Annual Budget	3 Years
Cancelled Checks, (from closed account, etc.)	3 years

*b) On file with Archives:*

- House Chronicles as part of the Permanent record

*c) Kept at the Local Residence*

Emergency Cards and Information	Current record
House Inventory	Current; Additions/Deletions
Annual Budget	3 Years
Monthly Accounting Reports	3 Years
Monthly Bank Reconciliation Sheets	3 Years
Cancelled Checks and Deposit Slips	3 Years
Paid Bills	3 Years
Durable Power of Attorney for Health Care and for Financial Affairs	Current

FREQUENTLY ASKED QUESTIONS AND ANSWERS: POLICIES, PROCEDURES  
AND PROCESSES

*Sisters, Servants of the Immaculate Heart of Mary, 610 West Elm Avenue, Monroe, Michigan 48162*

*Revised and approved by the IHM Leadership Council October 2013*

*Edited and produced by Monica Tylinski*



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FREQUENTLY ASKED QUESTIONS  
AND ANSWERS:

POLICIES, PROCEDURES AND PROCESSES OF THE  
SISTERS, SERVANTS OF THE IMMACULATE  
HEART OF MARY

MONROE, MICHIGAN, U.S.A

## *SECTION C. RESOURCES*

## **RESOURCES**

### **FINANCIAL AND LEGAL MATTERS**

#### **MAJOR POLICIES**

As in the early Christian community, we hold all things in common. From this community of goods each one's needs are met, and to this community of goods each one contributes according to her ability.

*IHM Constitutions, Article 22*

Following the tradition which has been ours from the beginning, we will take a part of whatever we have to contribute to charity, to respond to emergencies, and, in various ways, to share with others who are experiencing need.

*IHM Constitutions, Article S-44*

In the handling of our corporate investments, we will seek to reflect consistently the justice concerns which we express as a Congregation, and to consider where responsible shareowner activity can be taken by us and/or in collaboration with other groups.

*IHM Constitutions, S-45*

We recognize the interdependence of our choices as members of a community: we affirm the importance of quality of life for each member; we choose to increase the share of our resources committed to the materially poor; we accept our responsibility to provide for the support of our elders now and in the future.

*Community of Goods Directional Statement, January 16, 1988*

Financial decisions are guided by our congregational priorities as stated in our constitutions, current congregational statements and Chapter enactments.

*Approved by the SSIHM Congregational Governing Board, November 1990*

As a congregation we place our personal skills and our material resources in the service of mission which for us is rooted in liberating activity for justice. We are committed to financial interdependence, responsible corporate investment, and corporate policies which reflect our values and responsible planning for our shared future.

*Resourcing Cluster Focus Statement, August 1994*

#### **ACTING AS FINANCIAL ADMINISTRATOR FOR OTHERS**

If a sister is asked to assist in the administration of financial matters for someone outside the Congregation, she undertakes such a responsibility only after discussion with her mission

councilor and thorough consideration of all her consequent duties and possible circumstances. Past experience suggests that it is important that legal advice be sought on the matter so that all parties are protected.

*Executor of a Will*

A sister may be asked to accept administration of a parent's or close relative's will at the time of her/his death. Past experience suggests that a sister may best serve her family by urging that a competent lawyer or the trust department of a reputable bank be named executor of the will. If this is not possible, the sister may accept the responsibility. However, she makes certain that adequate provision is made by the requestor for legal assistance to be procured at the time she may have to exercise her role of executor. Also she makes certain that another executor is named in case she precedes the requestor in death.

*Co-signer of an Account*

A sister may be asked to serve as a co-signer on accounts for a parent or close relative. It is important that the sister clearly understand the implications of the responsibility she is assuming in the event of the incapacity of the individual to manage her/his financial affairs. These include the reporting of any income for tax purposes. Such accounts list first the Social Security number of the owner of the money (not the sister's number) and are never used as a depository or channel for any congregational/sister's money.

By agreeing to be co-signer on a bank account, a sister may be foregoing the opportunity to access government programs such as Medicaid or SSI.

*Power of Attorney for Another*

In cases where a parent or close relative is unable to carry out the necessary legal actions, she/he may wish to assign the power of attorney to another. A sister should urge that other family members or a competent lawyer be engaged for this purpose, but if circumstances require that she do so, she makes certain that adequate provision is made by the requestor for legal assistance to her in carrying out this responsibility.

**BANKING**

*Bank Credit Cards*

It may be advisable for an individual sister to have a bank credit card. It is understood that all accounts are paid in full monthly prior to the due date. To avoid late charges and interest payments, we do not carry a balance.

*Travelers Checks*

Sometimes travel circumstances make it advisable to convert cash into travelers checks. The possibility for a co-signer on travelers checks is now available.

It is not recommended to retain travelers checks longer than is necessary. In the event of a misfortune to the holder, the Congregation could experience difficulty in redeeming them.

Outside of traveling time, money can be put in the centralized savings account where interest will be realized instead of holding money in the form of travelers checks.

### *IHM Accounting Services for Local Houses*

The local houses of the Congregation use the IHM Accounting Services for banking and accounting purposes. There are four main reasons for the IHM Accounting Services:

1. It enables individuals to have their funds in an account which is clearly a congregational account, while having access to them as in any other individual account. This gives protection against any interpretation by the IRS that the monies in the individual account are at the discretion of the individual signers and is an expression of the reality that our material resources are truly communal.
2. It simplifies the record keeping at the local and congregational levels, since copies of the monthly reports are regularly available to users and leadership personnel.
3. It provides us with standardized tax information and reports to the Congregation.
4. It enables us as a Congregation to centralize the funds in our checking accounts and thereby retain a smaller total balance in non-interest earning checking accounts than would be necessary if our members had accounts in neighborhood banks. This means that we earn interest on more of our congregational funds than would otherwise be possible.

Accounts are to be reconciled regularly. Completed reconciliations forms are sent to CBO for accountability.

### *Local Bank Accounts*

In some circumstances it may be advisable to open a local bank account. A sister may contact the financial assistant in the Congregational Business Office (CBO) for assistance. Another IHM shall be a co-signer on the account. She shall send complete information about the account to CBO for emergency purposes. She shall send periodic (at least quarterly) statement to CBO.

## **DURABLE POWER OF ATTORNEY FOR FINANCES**

*What is the difference between a will, a Power of Attorney, and a Durable Power of Attorney?*

**Will** This is a document that directs the disposition of your assets after you die. All IHM sisters sign a will before final vows. This will is kept by the general secretary until a sister's death, at which time any patrimony is distributed according to the directions in the sister's will.

**Power of Attorney** A sister who is capable of acting, but who, for convenience or any other reason, wishes to have someone else act legally in her name, signs a Power of Attorney. A Power of Attorney is limited to what is described in the legal document.

**Durable Power of Attorney** A sister who is no longer capable of acting in her own behalf may have indicated a person to whom she wished to delegate her financial

responsibilities. These powers are defined by the sister while she is still capable, and duties are limited to what is described in the legal document.

*Who should fill out a Durable Power of Attorney?*

All sisters are expected to complete a Durable Power of Attorney for Finances. Any sister who has income on a regular basis which comes in her own name should have a Durable Power of Attorney on file if she expects another person to administer these funds when she is no longer capable. This is particularly true for sisters having:

- TIAA checks;
- dividends from stocks;
- taxable situations;
- care of family finances;
- pension checks;
- local bank accounts;
- recurring patrimony;
- social security checks;
- travelers checks, etc.;
- insurance refund checks.

*Since I signed a will when I entered the Congregation, do I also need to make a Durable Power of Attorney?*

Your will is used only after your death, while a Power of Attorney, durable or otherwise, is valid during your lifetime.

*A Step-by-Step Guide to Establishing a Durable Power of Attorney for Financial Affairs for an IHM Sister*

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If you are of sound mind, you may write a Durable Power of Attorney for Financial Affairs. This means you may voluntarily elect an advocate to make financial decisions for you if you become unable to express your financial wishes.

1. Let people know about your feelings and your use of the Durable Power of Attorney for Financial Affairs. Talk to family, friends, mission councilor, chief financial officer, anyone else who might be affected by your decision to use this Durable Power of Attorney.
2. Consider the kinds of financial decisions which might need to be made for you in the future, and what your wishes would be.
3. Name a person you can trust to speak on your behalf for financial affairs when you cannot express your wishes. Your advocate will work with the chief financial officer to make the necessary decisions in regard to your financial affairs. You may name a “successor advocate” if the first person you name is unable to act as your advocate when the time comes.
4. Fill out the available form. Your *Durable Power of Attorney for Financial Affairs* must be in writing, signed by you, witnessed by people who are not relatives or interested parties to your will or estate, dated, notarized and executed voluntarily. The witnesses sign the Durable Power of Attorney only if you are of sound mind and are not under duress, fraud or

undue influence to designate a Durable Power of Attorney.

5. For sisters residing in other states, the Michigan form may be used. In doing so you will need to have the form notarized with both the notary's signature and the application of the seal of the state (if applicable) in which you reside. The lawyer who examined the form suggests that you use 610 W. Elm Ave., Monroe, MI 48162 as your permanent address.
6. Give an original signed copy to the CBO and a copy to your advocate and successor advocate.

#### *Guidelines for Financial Agent*

- This designation shall not become effective unless the person is unable to participate in financial decisions.
- A financial agent shall not exercise powers concerning financial decisions that the person, if she were able to participate in the decision, could not have exercised on her own behalf.
- A financial agent shall not receive compensation for the performance of her authority, rights, and responsibilities, but a financial agent may be reimbursed for actual and necessary expenses incurred in the performance of her authority, rights, and responsibilities.
- A financial agent shall act in accordance with the standards of care applicable to fiduciaries when acting for the person and shall act consistently with the person's best interests. The known desires of the person expressed or evidenced while the person is able to participate in financial decisions are presumed to be in the person's best interests.
- A person may revoke her designation of a financial agent at any time and in any manner sufficient to communicate an intent to revoke.
- A financial agent may revoke her acceptance of the designation at any time and in any manner sufficient to communicate an intent to revoke.

## **HOUSE BUDGETS**

As in the early Christian community, we hold all things in common. From this community of goods each one's needs are met, and to this community of goods each one contributes according to her ability.

*IHM Constitutions, Article 22*

### ***Policy***

Sisters prepare annual budgets in the light of congregational and personal needs.

### ***Guidelines***

1. Participative process is encouraged when planning annual house budgets. Pertinent information will be provided annually.
2. House budgets cover ordinary expenses. Extraordinary expenses are taken care of by monies reserved at the leadership level.
3. Mission councilors annually approve house budgets.

4. Usually, house surplus monies are transferred at the end of the fiscal year.

## **HOUSING**

### ***Policy***

Sisters plan and budget for their housing according to their personal and ministerial needs in consultation with the designated leadership person.

### ***Guidelines***

1. The following considerations are taken into account when making decisions regarding housing:
  - health and safety;
  - cost of rent and utilities;
  - eligibility for subsidized housing;
  - proximity to place of ministry.
2. Furnishings belonging to the Congregation are inventoried yearly.
3. When renewal, study, illness, etc., necessitates that a dwelling is vacant for four or more consecutive months, the sister negotiates options such as subletting, terminating the rental agreement, disposing of furnishings, etc.

### ***Negotiating the Lease of a House/Apartment***

The following points should be considered and put in writing when negotiating the lease of a house or apartment:

1. Payments:
  - When is the rent due and how many days of grace are provided?
  - Who is responsible for the utilities?
  - How much security deposit is required?
2. Insurance:
  - How are personal injuries on the grounds covered by insurance?
  - How does fire affect the lease? Wind?
  - Storm?
  - Who is responsible for liability insurance on the house?
  - Are there valuables that should be separately insured? (Note: Renters insurance for reasonable “personal property” coverage is advised. This insurance will also provide a liability insurance component. Please call your financial assistant for more details.)
3. Care of house and grounds:
  - Who is responsible for major repairs?
  - In any emergency, such as plumbing, can the repairs be taken care of and the cost be taken from the next month’s rent?
  - Who takes care of the grounds?



- How often is the building painted, and at whose expense?
4. Furnishings:
    - Is there an inventory of all furnishings?
    - Are major appliances furnished?
    - Is the use of the garage and/or other outside facilities included in the lease?
  5. Relations with the lessor:
    - Can the house and/or apartment be sublet?
    - Under what conditions is the lessor permitted to enter the premises?
    - If the lessee is responsible for the upkeep and repairs, does the lessee have to check with the lessor before making changes in the décor?
    - Is there a limit on the number of people who may live in the house? Is the house restricted only to sisters? Example: Could a lay woman live with the sister(s) for some time?
    - Are there any restrictions on the number of guests, overnight visitors, pets, etc?
    - What are the conditions for terminations? Return of security deposit? Cession/transfer of utilities?

### *Subsidized Housing*

1. Restricts the rent charged to a low-income individual to a percentage of the renter's income with the government paying the remainder of the rent. Basically, the sister chooses a unit and pays rent equal to a percentage of adjusted income.
2. In applying for subsidized housing, some of the factors influencing eligibility are:
  - earnings;
  - monthly support;
  - patrimony;
  - Social Security;
  - pensions;
  - checking account (other than congregational centralized account);
  - an individual trust fund (any income from the trust should be counted in the annual income).

### *Inventories*

All contents of the house/apartment are assumed to be the property of the IHM Congregation. If there are any exceptions, the sister should record that information and make sure a copy is on file at the Congregational Business Office. No special form is required, but directions of disposal/return should be clear, including contact information. Example: family furniture that should be returned when a sister no longer needs it.

## **LEGAL EXPRESSION OF THE VOW OF POVERTY; IHM CONGREGATION**

### *Some Distinctions and Definitions*

Earnings and gifts received by a person under vow are the property of the Congregation by virtue of the vow and its legal expression in the Agreement of Sisters Under Vows.

Personal property owned at the time of profession or inheritance received after profession remain the property of the individual (her patrimony). By vow, she gives up the right to administer her property or its income. She cedes this over to another at the time of vows and at the time of receipt of any inheritance thereafter. She can change this arrangement only with the authorization of the president of the Congregation. The legal expression of this arrangement is the Cession of Administration and Disposition of Use and Usufruct.

### *The Procedures and Forms of Legal Expression of the Vow of Poverty*

By this commitment we promise to hold all things in common, contributing by our earnings and gifts to the community, and meeting our personal needs from community resources.

1. At the time of first profession, the sister signs the *Agreement of Sisters Under Vows* by which she legally agrees to:
  - Renunciation of remuneration for services rendered while she is in the Congregation in the event that she should ever leave the Congregation;
  - Incorporation of monies earned while she is a member of the Congregation so that these may become part of the community of goods out of which the members are supported and ministries of the Congregation carried on.
2. At the time of first profession, the sister signs two forms:
  - *Cession of Administration and Disposition of Use and Usufruct* which designates the content of her property and the administrator of it as well as the purposes for which it is to be used and the way in which any income from it will be used. By this she gives legal substance to her renunciation of the right to use or administer her property (her patrimony).
  - Power of Attorney, which legally signs over the right of administration to the administrator she has designated in the Cession in a document which is notarized by a Notary Public and so is acceptable in civil law.
  - At the time of receiving any additional inheritance, the sister signs another Cession form.
3. At the time of final profession, the sister makes her Last Will and Testament, by which she designates the disposition of her patrimony after her death.
  - A letter to the president of the Congregation can initiate the process of making a change in either the Cession of Administration or the Last Will and Testament. Frequently, the president will wish to meet with the sister before giving authorization for the change.
  - It is the intention of canon law and also of the practice of the IHM Congregation that changes not be frequent and that the sister's needs be met out of the community of goods, not out of patrimony.
4. The Church in Vatican II gave religious of simple vows the right to renounce the ownership

of their property also, something previously allowed only to those under solemn vow.

After at least five years of perpetual profession, a sister, with the authorization of the president, may renounce her patrimony totally or in part.

*IHM Constitutions, Article 140*

This can be done in part, up to one-third, by submitting the request to the president of the Congregation on the form for *Renouncement of Patrimony*.

There is also the provision for a total renunciation of present and future ownership. This can be done by a request to the president on the *Renouncement of Present and Future Patrimony to the Congregation* form.

## **MEDICAL INSURANCE COVERAGE**

### ***Policy***

Each sister is covered by health insurance through her employing agency or, in those cases where health insurance coverage is not available through the employer, through an SSIHM plan.

A copy of the policy description and health insurance card should be on file with the financial assistant in Congregational Business Office (CBO). Questions regarding one's health insurance plan should be directed to one's employer or, if on SSIHM plan, the financial assistant in CBO.

Each year the CBO will review group health insurance options for all sisters not on employers' plans. CBO will notify sisters of any changes to the congregational plans. For assistance with health insurance issues, call CBO.

### ***Medicare***

Medicare is health insurance for those who are over 65. Every fall, Medicare will send each recipient an updated handbook of information. Since the address for all sisters' Medicare information is 610 West Elm Avenue, the handbooks are sent to Monroe. An e-mail will be sent to ask if you would like your handbook mailed to you.

### ***Traveling Out of the U.S.A.?***

Ask if the doctor or hospital will bill your insurance plan directly. Some will. However, most doctors and hospitals in foreign countries will ask you to pay the bill.

Try to get an itemized receipt in English. If necessary, the insurance company can translate the receipt, but this will slow the processing of the claim. Submit the claim to your insurance company. Attach the itemized receipt.

The insurance company will pay the reasonable charge for eligible services in a foreign country at the rate of exchange in effect when you received the care.

## **PATRIMONY AND WILLS**

Personal property owned at the time of profession or inheritance received after profession, that is, patrimony, remains the property of the individual. By vow she gives up the right to administer her property and makes disposition of its use and revenues at the time of first profession and at the time of the receipt of any inheritance thereafter. She can change these arrangements only with the authorization of the president of the Congregation.

*IHM Constitutions, Article 137*

Prior to perpetual profession, each Sister makes a will by which she designates the disposition of her patrimony after her death. This will, valid also in the civil law, may be changed only with the authorization of the president of the Congregation.

*IHM Constitutions, Article 139*

After at least five years of perpetual profession, a Sister, with the authorization of the President, may renounce her patrimony totally or in part. Such a renunciation does not limit her capacity to acquire additional personal property through future inheritance.

*IHM Constitutions, Article 140*

### ***Clarifications***

#### ***Property***

Property includes any object of value that a person may lawfully acquire and hold. Property may be in the form of cash, certificates of deposit, checks, money orders, precious metals or jewelry, stocks or bonds, land, buildings, furniture, equipment, automobiles, art pieces, stamp or coin collections, or in the form of rights to a stream of income from such sources as rentals, land payments, oil wells or family trust.

#### ***Patrimony***

Patrimony is any property which is acquired by a sister as the beneficiary of a relative's last will and testament, or as the result of a relative's distribution of some property before his/her death rather than after. Therefore, patrimony is commonly called inheritance. However, not every inheritance is patrimony. Donations or bequests received from friends or acquaintances who know us as IHMs and/or because of our ministry among them are not considered patrimony. Such remembrances are classified as donations to the SSIHM Congregation.

Personal properties acquired by a sister while not a member of the Congregation are also considered and are provided for in her act of cession, whether they are to be administered by the Congregation or by another person or financial institution. Examples of personal property include a life insurance policy purchased by one's parents, a pension plan earned by work done before entering the community, or property owned at the time of entrance.

Each new inheritance received by a sister requires the appointment of an administrator and the signing of a new *Cession of Administration* to indicate the disposition of income on the new

inheritance.

#### *Administration*

With a simple vow of poverty, the sister retains the right of ownership of property but renounces the administration of her properties and the independent use of whatever income these properties generate.

The administrator assumes the responsibility of protecting the value of the properties, keeping accurate records, and dispensing the revenues earned by the properties (if any) according to the directions given by the owner.

These directions must comply with the limits imposed by the vow of poverty, as described in “Assignment of Revenue” below.

In choosing an administrator, the sister is free to select a relative or friend, a bank or trust company, or the SSIHM Congregation. At no time, however, may she retain her properties under her own control. All requirements of canon law are to be met regardless of choice of administrator.

If the sister chooses the SSIHM Congregation as her administrator, she sends her properties and records of her holdings to the chief financial officer for safekeeping. SSIHM retains the right to refuse the administration of any property which requires special handling or expertise due to: (1) the magnitude of the holdings, (2) the type of property, or (3) the distribution of earnings, any of which may make administration burdensome or imprudent for the Congregation to assume.

#### *Assignment of Revenue*

The *Cession of Administration* form asks for an indication of the sister’s wishes regarding who will administer her property and what is to happen to any income from her patrimony. As an example, stocks administered by the Congregation produce dividends, which are used according to the owner’s wishes, while the stocks themselves still belong to the sister.

Revenue earned by the personal property of a sister may be assigned on the Cession form to (1) Sisters, Servants of the IHM to meet the needs of the Congregation or others dependent upon the Congregation; or (2) the individual’s personal property account as restricted additions to her holdings; or (3) to some worthy cause. In the spirit of the vow of poverty in the Congregation, income cannot be assigned to the use of the individual sister or to meet needs that are normally funded by the communal sharing of goods (for example, housing, travel, or automobile).

#### *Renunciation of Patrimony/Personal Properties*

Religious in perpetual vows who wish to renounce their goods either in part or totally according to the norm of proper law and with the permission of the supreme moderator are to do so in a form civilly valid if possible.

*Code of Canon Law 668.4*

At the time a sister acquires property, she may dispose of all or part of the newly acquired properties for any good cause, excluding her own personal benefit. Since, by

vow, the independent use of material goods is given up, any disposal requires the permission of the president.

With the permission of the president, a sister can renounce her patrimony in favor of the Congregation. Canon and civil law both insist that it be clearly understood that a choice to give personal patrimony to the Congregation is a free choice and a gift. It is not a requirement of membership or vow.

People often ask the question: is it better to renounce patrimony or leave it as patrimony? The answer is that it depends on the individual sister, the size of the patrimony, the administrator and the eventual beneficiary of the will. For patrimony accounts administered by the Congregation and assets intended to be willed to the Congregation, there are these considerations:

1. The individual sister – Each sister knows her own needs, rights, responsibilities, motivations with regard to property and her own living of the vow of poverty. For some, it may be important to renounce property.
2. Size of patrimony – A very large patrimony will generate a large annual interest payment which is taxable to the individual even though she gives the interest to the Congregation. If the patrimony (or a portion of it) were given to the Congregation, the amount of interest would be the same but it would be tax exempt. The financial benefit of the Congregation would be equal to the amount paid in taxes on patrimony earnings.
3. If the Congregation is the intended beneficiary according to the member's will, a renunciation will remove the requirement to probate the member's will at her death, with respect to any property that is renounced.
4. If the sister will soon require health care, she may want to renounce her patrimony to allow the Congregation to use the funds for health care needs, allowing the sister to apply for governmental programs to supplement this resource.

If a sister desires to make a renunciation of her property, consultation with the chief financial officer is recommended for a fuller understanding. The written permission of the president is required for any renunciation. A sister must have been under final vows for at least five years before a renunciation is permitted. Forms for the renunciation are available in the Congregational Business, but a letter is sufficient. The letter should indicate where the property is to be sent and why the sister considers it "worthy." Forms for this request are available in the Congregational Business Office, but a letter is sufficient.

### *Sisters' Wills*

At the time of perpetual profession, each sister prepares and signs a will which designates to whom her personal property (patrimony) should go at her death. This document does not take effect until the death of the sister. If she should leave the Congregation, the will becomes null and void automatically. If the beneficiary named by the sister in her will dies prior to the sister, and if the sister has not named a second beneficiary, it is important that she rewrite her will. When a sister receives a new inheritance, she has the opportunity to revise her will to make a disposition of this new patrimony different from that provided in her earlier will. If she receives a sizeable addition to her patrimony, it is advisable that she review her prior will. Changes in one's will require the authorization of the president of the Congregation.

Forms for the will are available in the Congregational Business Office. The completed wills of the sisters are filed in the General Secretary's office.

### *Others' Wills*

Sometimes the question is asked whether or not it makes any difference if the individual sister or the Congregation is listed in a will of a relative or friend, or receives a gift from them. The answer is "Yes" to the recipient and to the donor.

The recipient: Property received by the individual religious may be her personal patrimony. Property received by the Congregation is available for general congregational uses.

The donor: Property given to the Congregation is exempt from estate tax and is a tax deductible donation. Property given to any individual religious may not be exempt from estate tax and will not be a deductible item on the estate return.

## **PENSIONS AND RETIREMENT BENEFITS**

Our history with pension plans started with TIAA and CREF at Marygrove College where, in recognition that future benefits would belong to the Congregation, TIAA premiums were paid jointly by the Congregation and Marygrove College rather than by deductions from a sister's salary. As we have moved to other ministries, premiums for pension plans have been covered in a variety of ways. Currently, retirement benefit payments are sent directly to the Congregation by administrators of many Catholic institutions in which we work. All other retirement benefit payments that come directly to a sister should also be sent to the Congregation. The Congregation continues to pool all retirement benefits received and from this pool dispenses to all retirees according to the need.

Pension earnings from Marygrove and all Catholic entities listed in the annual Official Catholic Directory are tax-exempt. Pension earnings of individual members in this situation are seen by the IRS as deferred earnings from the tax-exempt SSIHM organization. Generally, pensions based on taxable earnings are taxable when collected. (*See section on Taxable Income/Exemption.*)

Pension options should be reviewed to determine the best options. The Director of Financial Services is designated to assist an individual in these decisions. With SSIHM as the death beneficiary, if the recipient dies before benefits are exhausted, the Congregation receives the remaining benefit in a lump sum. Information and worksheets should be requested from the pension plan prior to the sister's 70 ½ birthday.

Pensions earned before entrance are considered patrimony (*See section on Patrimony and Wills.*) The individual is taxable for these monies because they belong to the individual and not to the tax-exempt organization.

Sisters should send quarterly reports from pension funds to CBO. Any changes in pension or retirement benefits should be reported to the financial assistant immediately.

### *Social Security (FICA) Tax*

In non-taxable situations, the full FICA tax is paid by the Congregation. Employers of sisters working in non-taxable situations are billed for half of the FICA amount, thereby reimbursing the Congregation, which has paid the full amount. *(See section on Social Security Program.)*

In a taxable situation, the employer pays half of the required FICA tax. The employee pays the other half, which is deducted from her paycheck.

If a sister is self-employed or has income from contracted services, she pays the entire Self-Employment (SECA) amount as both employer and employee. *(See section on Taxable Income/Exemption.)*

### *Flexible Spending Account*

This is a consideration only for those whose earnings are subject to income tax. This is an acceptable recognized plan whereby an employee applies to her employer for payment (reimbursement) of medical expenses not covered by insurance, for example, co-pays. The amount requested is then deducted from a person's gross wages each pay. The person receives fewer taxable dollars from the employer, reducing her tax liability. The effect is that the person pays her bills from earnings but those earnings are not part of the amount upon which her income taxes will be computed. Careful projections are necessary because any amount not spent is not returned by law.

### *Pre-Tax Annuities*

Generally, pre-tax annuities are intended to delay income to a time when the taxpayer is in a lower income bracket and less tax is owed. If the employer provides matching funds for the pre-tax donation, sisters are encouraged to participate in matching contributions with the employer.

### *Life and Disability Insurance*

These are intended to protect the insured or the insured's dependents in the event of catastrophe. It is recommended that an employer's plan be accepted only if it is paid for entirely by the employer.

### *Room and Board or Housing*

In situations where this is offered as a benefit, individual consultation with the mission councilor is recommended.

### *Automobile and/or Gas Reimbursement*

When a congregationally owned car is used in a sister's ministry, employer reimbursements need to offset wear and tear on the car as well as cover the out-of-pocket costs of gas and parking. Since this is so, adequate reimbursement to defray auto costs should take into account the cost of replacing the car.

The IRS annually states an amount which can be used in tax calculations. This may be a help to the sister in negotiating such reimbursement for her auto expenses.



## **SALARIES AND FRINGE BENEFITS**

### ***Salary***

Sisters in whatever sector of ministry – public, private or Church – are urged to negotiate adequate salaries consonant with their expertise and position. Those in a Church ministry may be somewhat limited by diocesan guidelines; others may receive less because of poverty conditions, or be otherwise subsidized with approval of their mission councilor.

For sisters in Michigan Church-related ministries, according to the compensation plan in collaboration with other religious communities, the president of the Congregation sends out a letter in the spring of each year providing directives for the minimum need figure per sister, FICA, retirement amount, and any other pertinent information. Sisters in Church-related ministries in other states use the Michigan compensation as a guide in their negotiations.

One determination that must be made is whether taxes should be withheld. If a sister is employed by an institution listed in the annual Official Catholic Directory her income is not taxable, and she should not fill out a W-4 form for her employer (see section on Taxable, Non-Taxable income).

### ***Benefits***

Benefits defined here refer to those goods and/or services of a monetary value offered to an employee by the employer over and above the employee's salary.

The rights of each individual with respect to employee benefits are covered by civil law. Employee benefits for members in non-Church related employment are the same as for any other employee. Questions relating to different benefit options and pertinent civil law are often best answered by the personnel office of the employer. Employee benefits in Church-related entities may be covered by laws other than the usual labor laws. The financial assistant in the CBO may help in clarifying which questions to ask or in sharing the experience gained from talking with others in similar situations.

As with earnings, all benefits resulting from employment of members are an integral part of our community of goods whereby all that we receive belongs to the Congregation and each one receives from the Congregation according to her need.

The manner in which the Congregation administers benefits, from whatever source, recognizes them as part of the community of goods in which we all share.

One policy pertaining to all benefits is that Sisters IHM, Monroe, Michigan, be assigned as the death beneficiary for all benefits for which this is applicable. This is in accord with our intentions as expressed in our vows. Not all personnel offices are aware that an organization rather than an individual can be named as a beneficiary. Check with the CBO for advice if this situation arises. It is better to provide correct information initially than to make changes later or have benefits forfeited by the Congregation.

Please provide the CBO with the necessary documents relating to any benefits to which you are entitled.

It is generally assumed that an employer provides at least health insurance, pension or retirement, and Social Security. Additional benefits such as flexible spending accounts or annuities and life insurance or disability insurance may be offered. According to circumstances, housing or transportation may also be provided.

### *Medical/Dental Insurance*

It is generally recommended that an employer's plan be accepted if it includes adequate coverage to meet the health needs of the member and is paid for entirely by the employer. Consultation with the CBO financial assistant can help you assess which plan is best for you.

Being aware of what a health plan covers is the primary responsibility of the individual. Some plans limit participants to particular doctors and hospitals; some impose specific requirements in the use of specialist referrals and emergency or other services. If a sister judges that an employer's plan is inadequate in its provisions for her particular needs, she may select coverage through an SSIHM plan, requesting that the employer pay the Congregation for the amount of premium due.

In arrangements where an individual must pay a portion of the insurance premium, either directly or through salary deduction, it is recommended that the plan be evaluated on a cost/benefit basis with other alternatives available. For example, if a dental insurance premium (usually about \$300.00 per person, per year) is deducted from the salary, it may be more cost effective to decline that portion of the coverage and send extraordinary dental bills to the CBO financial assistants for payment. This is an instance where an individual assessment of expenditures for a plan seems sound, but within the context of our community of goods, payment of bills as they are incurred has less average cost for us as a group than if everyone bought individual dental coverage.

One question that can arise is "Which insurance coverage is primary for the employee after the age of 65?" The ordinary rule in taxable entities is that an employee must have the employer's coverage as primary (which means that this coverage pays first). A person may have Medicare also, which would then pay some costs not covered by the primary insurance.

## **SELF EMPLOYMENT**

This section is intended to assist the individual and leadership during their mutual discernment of an individual's missioning when it involves self-employment. Its chief component is the strong recommendation that a five-year detailed business plan be developed. Frameworks for such plans are available in local libraries, small business organizations, and bookstores.

Generally, it is to an employer's benefit and to an individual's disadvantage monetarily to classify the individual as contractual or self-employed. Therefore, some definitions are presented for clarification.

Generally the self-employed person is one who is free from the control and direction of a

supervising employer. The self-employed person is not on a payroll and consequently is not subject to withholding taxes on income.

For religious, “self-employment” earnings occur in two types of situations. They are what might be called a “stand-alone” work situation, or contracted services.

### ***“Stand-alone” Work***

This term is used here simply as an image. It has no legal meaning. The work of religious is always undertaken with the missioning of the Congregation and all earnings are treated as belonging to the religious Congregation, consistent with Canon 668, Sec. 3 and the constitutions of the religious institute.

Usually the work of a religious is within a Catholic institution and is supervised by those in charge of the institution. However, there are some religious whose work is also a participation in the exempt activity of a Church organization, but who do not work under the direct supervision of those in charge of a particular Catholic institution. These activities might include individual retreat work, spiritual direction and counseling, theological or other Church-related writing, the production of artistic works or objects used in connection with worship, the giving of private music lessons to students as an extension of an educational apostolate, and instruction in wholistic health care as an extension of a traditional health care apostolate.

Although a religious may be working in a manner not unlike that of a self-employed person, she is exempt from paying self-employment taxes on amounts earned for work performed for the religious Congregation, the Catholic Church or any of its agencies, where the services are related to the Church’s exempt purposes or the goods are intended for use in connection with exempt activities.

However, the “self-employed” religious is taxable whenever these activities lose their connectedness with the organizations’ exempt purposes. A facts and circumstances test must be applied, for there is a variety of ways in which an activity may be related to the activity or purposes of the exempt organization, including location, population served, the nature of the activity itself, etc. “Neutral” activities should be factually distinguishable from the activities of others who are doing the same type of work for a commercial motive or as a professional enterprise.

“Stand-alone” activities which create taxable earnings for religious would include the writing of secular books, art objects (whether of a religious theme or not) sold to the general public, the general practice of a profession such as law or medicine, or the conduct of a commercial enterprise.

It should be noted that “self-employment” income does not result from an isolated event unconnected with one’s usual occupation, e.g., one book written, one speech given.

A mix of taxable and non-taxable earnings is not unusual. A writer who writes the history of a religious Congregation (for the Congregation itself) and also writes a Book-of-the-Month club selection would have such a mix. The non-taxable compensation is excluded from all tax considerations. The IRS accepts the Church-related compensation as belonging to the religious Congregation.

Church-related compensation, that is, compensation paid by an entity listed in the United States Official Catholic Directory (OCD), should not appear on any tax information report or tax return as income of the individual. All income earned by members of religious communities is under the ownership and control of the congregation by virtue of the individual's vow of poverty. Income for members of religious communities should be paid either in the name of the individual's congregation (Sisters IHM) or in the name of the congregation and individual (Sisters IHM and Jean Doe, IHM). The hiring body does not provide tax forms or income documentation or the like. If the organization providing the self-employment opportunity needs clarification or documentation to prevent the issuance of payroll or other tax forms, the Congregational Business Office will provide any necessary documentation.

### ***Contracted Services***

A secondary category of "self-employment" earnings may be likened to the earnings of an independent contractor. For religious this arises only:

- when work is done for a non-Catholic Church entity, and
- in circumstances which do not establish an employer-employee relationship, and
- where no contract exists between the religious congregation and the non-church employer for the services provided.

Under these circumstances compensation is paid with no deductions for taxes and with no employer FICA contribution. These payments are likely to be reported to the IRS by the payer on a 1099-MISC information report, using the social security number of the individual religious.

Self-employment income is subject to income tax. Please consult with the Congregational Business Office about potential income tax liability.

### *Criteria to be considered when discerning self-support:*

- *Expenses—Personal*
  - Entire FICA amount
  - Medical insurance
  - Pension/retirement
  - Personal income tax
- *Expenses—Business*
  - Physical space and utilities
  - Equipment and supplies
  - Site and content insurance
  - Other liability insurance
  - Business taxes
  - Sustaining of uncollected fees
  - Sustaining of delayed payments
  - Marketing, advertising, goodwill costs
  - Research, development, workshops, books, training, etc.

*Your product/service*

- Can you provide it for one-third of the cost to your customers? Remember you are paying for yourself, your benefits, your business operation, and your business' product development and training with its trials and errors
- Do you have enough time and service to offer to bring in the required income to offset expense? To determine, subtract vacation, retreat, research and product development time, sick time, personal days and/or weekends from the number of hours possible in a given year. This is basically the number of hours that you have to provide your service from which you will receive income. Taxes may decrease this amount further.
- If you have determined that your rate will be close to or have to be at the market rate, is your product competitive enough? Is it too easily reproduced without you?
- Is your service/product constrained in such a way as to limit available quantities and therefore sales or income? For example, a counselor can listen to only so many people a day and maintain the necessary paperwork.

*Your customers/clientele*

- Do they have resources to pay you what you require?
- Will there be a mix of taxable and non-taxable transactions? Depending on the mix, do you incur the cost of taxes to serve the taxable group? On the other hand, will your enterprise survive if you service only non-taxable groups?
- Are payments direct from the client or through third party reimbursements with their additional requirements and fee setting?

*Tax considerations*

Different business structures offer different tax advantages. These must be evaluated for best fit. The Congregation has received a tax-exempt classification from the civil government. Individual members have not received this exemption. In most cases, the Congregation tax number cannot be used in self-employment situations. The self-employment situation would have to satisfy all the tax-exempt requirements that the Congregation fulfills. Permission to operate under the Congregation's Corporate Charter must be approved formally by the SSIHM Corporation Board.

Other sections for reference are *Medical Insurance Coverage, Salaries and Fringe Benefits, Social Security Program, Taxable Income/Exemption.*

Preceding material adapted from LCWR Bulletin #58, P.7+, January 1991

## **SOCIAL SECURITY PROGRAM**

### ***Coverage of Members of Religious Orders***

A member of a religious Congregation is eligible for Social Security coverage by her religious

Congregation when she performs tasks usually required and to the extent required of an active member of the Congregation. The Congregation pays FICA taxes for sisters until they reach 70 years of age or have signed a declaration of retirement status.

In 1972, Congress passed a special act to permit religious to benefit from Social Security. Social Security taxes for religious are based on a special concept of compensation, recognizing the sister as an “employee” of her Congregation and her “wages” as the fair market value of personal living expenses supplied to all members of the Congregation. This includes all items bracketed on the budget forms, as well as health care coverage.

Each Congregation must determine this fair market value for its members using its own financial data (i.e., member budgets). The fair market value, in turn, serves as the basis upon which FICA taxes are paid.

If a sister is working in a ministry not listed in the current Official Catholic Directory, FICA taxes are paid by her employer and herself through deductions from her pay.

A sister whose status changes from/to employment by an institution not listed in the current Official Catholic Directory is to notify the CBO financial assistant of this change in order that payment by the Congregation may end/resume.

#### *Social Security Benefits*

Application for Social Security benefits is made for each sister when she reaches full retirement age. This application is sent to each individual sister three months prior to her 66<sup>th</sup> birthday by the CBO. Since the enrollment and records for Social Security of our sisters are under the SSIHM Congregation at 610 West Elm, all applications for benefits are made through the Monroe Social Security Office by the CBO.

#### **TAXABLE INCOME/EXEMPTION**

At present, religious orders (not the individual members) are “by the grace of Congress” exempt from tax on their income because of their 501(c)(3) status under the Internal Revenue Code. This means that religious orders are organized and operated exclusively for religious, charitable, scientific, literary or educational purposes.

Since 1977, when the Internal Revenue Service (IRS) published Rev. Ruling 77-290, 1977-2 C.B. 26, compensation for the services of a religious for work rendered to the order or to the sponsoring Church or its institutions remains “excludable” from the taxable income of the members. However if the member performs work for a non-Church employer, or is self-employed in a non-Church activity, the earnings are fully taxable to the individual religious. An exception exists in the case where the member acts as a true agent for the order. With respect to the Catholic Church, IRS interprets “agencies of the Church” and “associated institutions” to include all organizations listed in the Official Catholic Directory.

No employing agency under the auspices of the Catholic Church should request a sister to fill out a W-4 form nor should they issue a W-2 or Form 1099 to sisters for compensation earned

or withhold FICA or income taxes. The earnings of the religious are exempt from income tax if the earnings are clearly the income of the order, not of the individual. This is interpreted by the IRS to mean that the religious is assigned to work with:

- An organization listed in the Official Catholic Directory;
- A 501(c)(3) organization and the Congregation has contracted her services with that organization, i.e., the contract is between the Religious Congregation and the organization, not between the individual religious and the hiring agent.

In order to safeguard this tax-exempt status and to make it clear that all income earned by its members is under the ownership and control of the Congregation, a centralized bank account is used for deposit of sisters' compensation.

It seems apparent now, however, that this may not be enough. When checks are made payable to an individual, the IRS could possibly interpret that the control of funds rests with the individual rather than the Congregation.

It has been recommended by the general counsel of the United States Catholic Conference that checks should be issued in the name of the religious institute, for example, Sisters IHM. An alternative is using the joint names of the religious institute, and the individual religious, e.g., Sisters IHM and Jean Doe, IHM. Many sisters are having their pay deposited directly into the Congregational account, with their living expenses then deposited directly into their house accounts. If you wish to make use of this method, please contact a financial assistant .

The income of a sister serving in a non-Catholic entity is subject to both income tax and Social Security tax. For the religious in a taxable situation, withholding for FICA and income taxes should be done by the employer as required to avoid penalties for underpayment. Occasionally, a religious will mistakenly instruct a non-Church employer not to deduct Social Security taxes from her salary. The religious may believe that all Social Security taxes are paid by the Congregation. The employer may comply (it's a savings for the employer) and in effect treat the religious as an "independent contractor" when in reality the person is an employee. The result is that the religious will be obliged to pay 15.3% Self-Employment Tax (SECA) rather than 7.65% FICA.

A taxpayer is entitled to a determination of status if there is any reason to believe that an employer is trying to reduce costs by classifying employees as "independent contractors."

### ***Implications of the IRS Ruling for IHMs***

The Congregation must be able to provide evidence that each sister has been assigned to her ministry and that she does not have discretionary use of her income. The documentation which the Congregation uses to provide this evidence for IHMs is threefold:

1. The Commitment Form signed by the mission councilor. This document provides evidence that sisters are sent by the Congregation to carry on the apostolic mission of the Congregation.
2. An approved budget which gives evidence that we do not have discretionary use of our earnings.

3. A centralized IHM Banking Account verifying accountability to the Congregation.

### *Self-employment*

Sisters unsure of their tax status should consult current IRS guidelines for deciding whether a worker is considered self-employed. These are contained in the section on Self-employment.

Self-employment income needs careful monitoring for several reasons:

1. If net income from self-employment reaches \$400 in a calendar year, Employment Tax is required.
2. If income from self-employment will result in a tax liability in excess of \$500 for the year, quarterly estimated tax returns must be filed and estimated taxes paid. Interest and penalties result if estimated returns are not filed as required.

Religious subject to self-employment tax should review tax rules regarding allowable deductions for ordinary and necessary business expense and for business losses. The Congregational Business Office will be able to help. Additional professional tax advice may be necessary in some complicated situations.

### *Taxable Pension Income*

As a general rule, pension income which is derived from work in which the religious was subject to taxes, either as a member of the order or before entrance, is itself taxable income to the individual religious. Conversely, pension income derived from work performed as a religious in non-taxable Church employment is not taxable income to the individual as long as she remains a religious and the pension is turned over to the order.

### *Taxable Social Security Benefits*

Religious who receive Social Security benefits and who have other taxable wages, interest or dividend income in excess of \$25,000 for the year may find that up to 50% of their Social Security benefit is subject to federal income tax. See the benefit statement (SSA-1099) and IRS worksheet (IRS Notice 703) which is mailed to each Social Security recipient in January to determine if any portion of the benefit is subject to tax.

Individual sisters who have questions regarding their taxable status or who have been contacted by a regional IRS office should notify the CBO immediately.

## **TRANSPORTATION**

### ***Policy***

Each sister plans to meet her transportation needs. These needs will be addressed by the individual sister and her mission councilor, who will be attentive to adequacy, safety and availability.



### **Guidelines**

1. Cars are owned or leased corporately in the name of the Congregation.
2. Cars are insured corporately in the name of the Congregation.
3. New cars are purchased or leased in a range recommended by leadership and updated periodically. (The price of a car includes any dealer add-ons: taxes, license and fees, delivery charges, rebates, etc. It does not include the trade-in value of another car.)
4. Cars are kept for minimum of seven years or at least 100,000 miles.
5. Monies are budgeted annually by the leadership for automotive purchase or lease and IHM fleet insurance based on that year's needs assessment.
6. Monies are budgeted annually at the local level for operational maintenance and road service based on that year's needs assessment.
7. Only IHM sisters or approved employees should drive SSIHM-owned vehicles because of the liability involved.

### *Guidelines for Non-Drivers*

Monies are reserved in house budgets to meet transportation needs of non-drivers (e.g., their share of gasoline expenses, taxi cabs, buses, dial-a-ride, and subways).

### *Congregational Fleet Plan*

**Insurance** Cars that are owned by the SSIHM Congregation are covered by the Congregation. The congregational fleet plan includes liability coverage and a self-funded plan for collision.

**Liability** The possession and/or use of a car by a sister carries with it a liability that could affect the entire Congregation. If a lawsuit is instituted as a result of an accident, the law, in most cases, holds the owner (in our case the IHM Congregation) of the car involved in the accident liable, regardless of who the driver is. Liability coverage pays if a member is sued by a person hurt in an accident she caused; it also offers protection for property damage if a member is at fault.

**Collision** A portion of the premium amount for each vehicle is reserved in a congregational account to cover the cost of repairing or replacing our vehicles that have been stolen or damaged in accidents.

### **Accidents**

In case of an accident:

- stop immediately;
- call police, emergency services;
- exchange information with the other driver: name, address, phone, license number, insurance company;
- report the accident to the police;
- fill out the accident report and send it to the CBO;
- sign NO statement; and
- report the accident to the insurance agency.

Contact with other parties involved in the accident will be handled by the insurance company's personnel.

### **Documents**

The following documents, if in the name of the Congregation, should be on file in the Congregational Business Office:

- title of the car
- original bill of sale
- copy of one's personal driver's license
- copy of the car's current registration.

### **Car Purchase**

1. After consultation with her mission councilor, the sister contacts the fleet manager to discuss how this purchase is to be made.
2. Once a decision to purchase is made and the car is selected, the sister contacts the fleet manager to determine a method of payment.
3. On purchasing a car, all titles must be made out to:

*Sisters, Servants of the Immaculate Heart of Mary*

Those residing in Michigan (or wishing to register the car in Michigan) need to address the title:

*610 W. Elm Avenue  
Monroe, Michigan 48162*

Those residing outside Michigan and wishing to register in their resident state should give their home address and forward the original title to:

*610 W. Elm Avenue  
Monroe, Michigan 48162*

The original bill of sale is signed by the purchaser as an agent of the Congregation. Therefore, the signature should appear as: "Sisters IHM, \_\_\_\_\_ Agent."  
The invoice is then sent to the Congregational Business Office.

4. Transfer of insurance is done through the fleet manager once the car is purchased.

### **Sale of a Used Car**

1. When changing cars, the sister needs to notify the fleet manager to discuss with her what should be done with the car being replaced.
2. When a car is sold, the following must be done:
  - obtain a used car sales form from the fleet manager;
  - transfer the title (follow directions on the title);
  - fill in the correct odometer reading;
  - remove license plates;
  - return completed used car sales form and license plate and registration to the fleet manager.

### **Operational Policy for Safe Driving**

Driving is a privilege, a responsibility, a means of personal independence and an opportunity to

serve others. In the interest of overall safety there are times and situations in which the driving ability of an individual sister will be reviewed so as to ensure the safety of the individual and others on the road.

### *Expectations*

All IHM sisters licensed to drive are required to provide for the fleet manager a copy of their current driver's license and automobile registration. These are to be sent to the fleet manager in the CBO.

Driving records will be reviewed by the insurance company yearly. Problems surfaced during this annual review will be referred to the Mission Councilor who will determine with the sister driver the appropriate steps to address the problems. A Defensive Driving Class may be recommended.

A sister who is involved in three accidents in a two-year period, no matter who is at fault, will be required to take a driver assessment test. The results of the testing will be reviewed by the sister driver and her Mission Councilor to determine next steps. The complete assessment should be forwarded to the fleet manager in the CBO.

A sister whose driving ability has been affected by either a medical condition or physical injury and/or who is experiencing overall diminishing physical capabilities due to any reason will be required to take a driver assessment test. The results of the testing will be reviewed by the sister driver and her Mission Councilor to determine next steps. The completed assessment should be forwarded to the fleet manager in the CBO.

At 80 years of age, and every other year thereafter, IHM sisters are expected to take a driver assessment test. The results of the testing will be reviewed by the sister driver and her Mission Councilor to determine next steps. The completed assessment should be forwarded to the fleet manager in the CBO

### *Procedures for Implementing the Safe Driving Policy*

Car registration, valid driver's license and car insurance are three documents that need to be kept current and easily accessible at all times.

The accident report form included with insurance documents shall be used in the event of an accident. This report will be returned to the fleet manager.

Lists of approved agencies for the defensive driving course as well as driver assessment test facilities will be maintained by the Leadership Council offices and available upon request.

When a sister no longer drives she is encouraged to obtain a valid photo identification card through the State Department of Transportation. In Michigan a P.I.D. (personal identification document) is free to those 65 years of age and older from the Secretary of State office.

Independence and the freedom to minister are values that we support as a congregation. Each sister is encouraged to make plans for transportation when she is no longer able to drive herself.

As we encourage sisters to plan for the aging process in other areas of their lives, we also encourage them to plan for their transportation needs once they are no longer able to drive.

*Approved by Coordinating Council, March 2010*

*Revised by Leadership Council, April 2012*

## **APPLYING FOR STATUS AS A SPONSORED MINISTRY IN THE OFFICIAL CATHOLIC DIRECTORY**

Under certain circumstances, the IHM Leadership Council may agree to include certain ministries of IHM sisters under the IHM listing in the *Official Catholic Directory* (also known as the Kenedy Directory), which is the official listing of Catholic ministries in the United States Catholic Church.

### ***Guidelines***

1. Leadership Council receives a written request from an IHM Sister requesting inclusion of her ministry in the Official Catholic Directory. The request should contain information about the ministry including the history, type of ministry, people served and the IHM's involvement in the organization.
2. With the approval of the Leadership Council of the Sisters, Servants of the Immaculate Heart of Mary, the congregation requests the listing in the Official Catholic Directory from the Archdiocese of Detroit.
3. The tax-exempt status is dependent on the diocese acknowledging the entity as a ministry of that diocese; thus sharing in its 501(c)(3) status.
4. If the tax-exempt status is approved by the Archdiocese, the Archdiocese applies to the United States Conference of Catholic Bishops (USCCB) for a letter accepting the entity for inclusion in the next edition of the directory. Until the next issue of the directory is printed, a copy of the USCCB's letter of acceptance for the entity may be used as proof of the entity's tax exempt status and its authorization to receive tax-deductible donations.
5. Each entity should keep copies of the current pages of the Official Catholic Directory that list the entity together with the annual Group Ruling letter issued to the USCCB by the Internal Revenue Service (IRS) and the letter from IRS issued July 1<sup>st</sup> of each year. These documents establish the exemption from federal income tax and the deductibility, for federal income, gift and estate tax purposes, of contributions to such organizations.
6. Ministry listings in the Official Catholic Directory must be annually updated with current information in order to keep the 501(c)(3) status for the ministry. This is coordinated through the IHM General Secretary.

## **MONROE CAMPUS SERVICES**

### **COMPUTER PURCHASING**

Computers are available in resident lounges for residents of the Monroe Resident Community. Computers and printers are also available in the computer room located on Ground Floor near the library. Wireless access is available throughout the building. Those bringing their own computers to the Motherhouse who will require access to the wireless network should make arrangements in advance through the Information Systems Office at 734-240-9706.

Sisters planning to move to the Motherhouse are encouraged to use these facilities if they meet their needs. Individuals who require a personal computer for their use are assisted by the Motherhouse computer team.

It is assumed that all IHM sisters not in residence at the Motherhouse have adequate access to internet services. Computer needs will be addressed by the individual sister and her mission councilor. When appropriate, the mission councilor may refer the sister to the Information Systems department on the Monroe Campus for assistance in evaluating computer needs and purchasing appropriate equipment.

### **EVENTS PLANNING**

Sisters wishing to plan events at the Motherhouse should call the Events Coordinator at 734-240-9870. The Coordinator will assist in reserving rooms, planning meals with the Food Service Office and arranging for audio-visual equipment to be provided. See the IHM website for more information.

### **INFORMATION SYSTEMS**

The Information Systems Office provides services mainly for departments located on the Monroe Campus. The department may be able to provide advice and assistance to other groups upon request.

### **MOVING ASSISTANCE**

The Monroe Campus Services Office can provide assistance for those moving to the Monroe area. The office maintains a current list of moving companies and can coordinate moves for sisters who need assistance, especially in moving to the Monroe area. Contact the Monroe Campus Services Office at 734-240-9742.

FREQUENTLY ASKED QUESTIONS AND ANSWERS: POLICIES, PROCEDURES  
AND PROCESSES

*Sisters, Servants of the Immaculate Heart of Mary, 610 West Elm Avenue, Monroe, Michigan 48162*

*Revised and approved by the IHM Leadership Council October 2013*

*Edited and produced by Monica Tylinski*



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FREQUENTLY ASKED QUESTIONS  
AND ANSWERS:

POLICIES, PROCEDURES AND PROCESSES OF THE  
SISTERS, SERVANTS OF THE IMMACULATE  
HEART OF MARY

MONROE, MICHIGAN, U.S.A

**FREQUENTLY ASKED QUESTIONS AND ANSWERS:  
POLICIES, PROCEDURES AND PROCESSES  
OF THE SISTERS, SERVANTS OF THE  
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FREQUENTLY ASKED QUESTIONS AND ANSWERS: POLICIES,  
PROCEDURES AND PROCESSES

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