

# Canon Law Society of America



## ***86th Annual Convention***

October 14-17, 2024

*The Ministry of Justice in the 21<sup>st</sup> Century*

Albuquerque, New Mexico



**2024 CONVENTION OF THE CANON LAW SOCIETY OF AMERICA**

*The Ministry of Justice in the 21<sup>st</sup> Century*

The 86<sup>th</sup> Annual Convention of the Canon Law Society of America provides a golden opportunity to learn together, to share experiences, and to continue to build a valuable network of colleagues and friends as we engage in the ministry of justice.

The ministry of justice in the 21<sup>st</sup> century relies on reading the signs of the times in our world, on an appreciation for movements in and of the Church, on responding to the call to personal holiness, and above all to careful discernment and prudent action. The human rights of indigenous and immigrant peoples and the pervasive influence of social media are examples of the varied matters we navigate in canonical ministry. As promoters of the law we will address how law protects the freedom of people. Issues regarding marriage, formation, penal law, institutions within the church, and the pastoral and canonical response to questions that arise in regard to transgender persons will be discussed.

The Pre-Convention Workshop provides training in gathering testimony and evaluating proofs in marriage and penal causes and in processes toward the canonization of saints.

We welcome you to this gathering, as we together grow in the ministry of justice.

Board of Governors

July 2023

**CANON LAW SOCIETY OF AMERICA**

*Board of Governors*

**Very Rev. Kenneth Riley, JCL**  
*President*

**Rev. Patrick Cooney, OSB, JCL**  
*Vice President*

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**Rev. John Donovan, JCL**  
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*Consultor*

**Dr. Jeannine Marino, JCD**  
*Consultor*

**Mr. Benedict T. Nguyen, JCL**  
*Consultor*

**Rev. Msgr. Robert Oliver, JCD**  
*Consultor*

**Sr. Tracey Sharp, SCRH, JCL**  
*Consultor*



Archdiocese of Santa Fe  
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## OFFICE OF THE ARCHBISHOP

October 14, 2024

Dear Members of the Canon Law Society of America,

It is with joy that I welcome you as you gather for the 86<sup>th</sup> Annual Convention of the Canon Law Society of America (CLSA) here in the Archdiocese of Santa Fe. The theme of your convention, *Ministry and Justice in the 21<sup>st</sup> Century*, is certainly relevant as the Catholic Church seeks to respond to the challenges we face in our world today, challenges that often threaten the rights and responsibilities of the People of God. I am grateful to the members of the Canon Law Society of America for not only providing support to church leaders in meeting these challenges but also for your integrity and competence in challenging the Church to live up to the Gospel both pastorally and canonically. Repeatedly, I have benefitted from your guidance in delicate and complicated matters in my duties as a pastor and in caring for the People of God. Therefore, I thank you for your dedication to the “study and application of canon law in the Catholic Church.” In CLSA’s letterhead, I note your reference to Romans 8:2: “...in Christ Jesus the life-giving law of the Spirit has set you free from the law of sin and death.” I hope that your time in the Archdiocese of Santa Fe affords you an opportunity to breathe deeply the life-giving law of the Spirit and that you will strengthen the bonds that unite you as a society of canon lawyers.

Please be assured of my prayers for you and your ministry. May our Lord send his richest blessings to you, strengthening you and your ministry, and guiding you through the Holy Spirit in wisdom and grace.

With every best wish, then, I remain

Sincerely yours in the Lord,

A handwritten signature in blue ink that reads 'John C. Wester' with a cross symbol to the left.

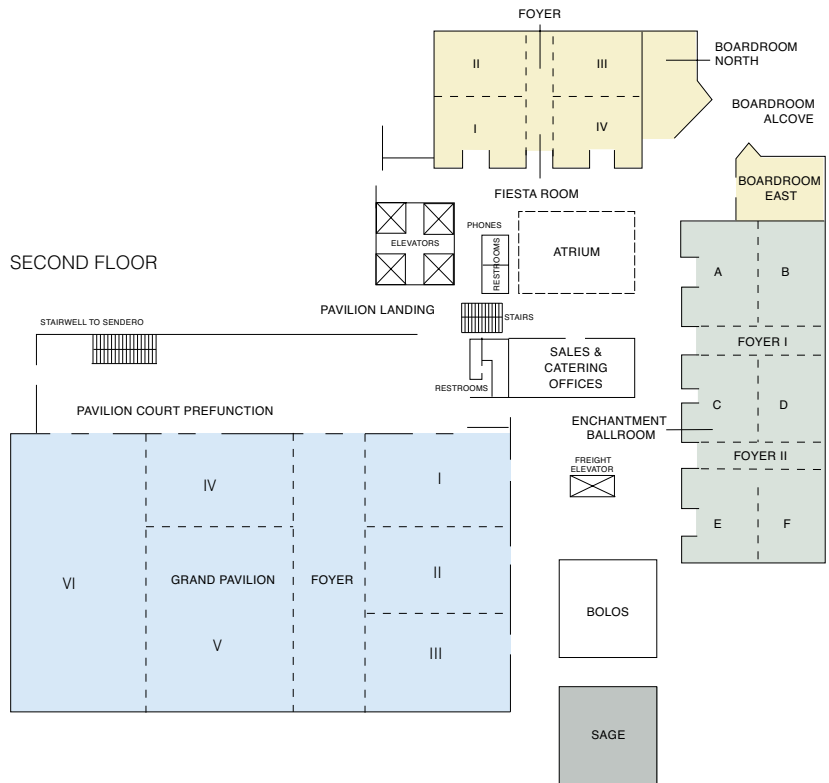
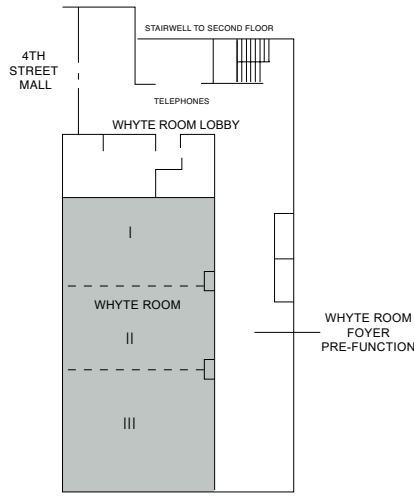
Most Reverend John C. Wester  
Archbishop of Santa Fe



# THE CLYDE HOTEL

**DIRECTIONS:**

From Albuquerque International Airport: Take Sunport Blvd. (west) to I-25 (north). Travel to Dr. Martin Luther King Ave. exit. Proceed west on King to 6th St. Turn left. Follow 6th St. to Tijeras. Turn left. Hotel is on Tijeras on right.



Canon Law Society of America  
86<sup>th</sup> Annual Convention Program and Report Booklet  
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# *Pre-Convention Workshop*

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One pre-convention workshop is offered this year in conjunction with our Annual Convention for \$325 (early-bird discount). Participants will have their choice of further instruction in one of two tracks at scheduled intervals. The workshop begins Sunday, October 13, 2024.

## *Arriving at the Truth in Causes of Marriage, Sinners, and Saints*

Declaration of nullity cases, penal trials, and causes of saints are very different kinds of processes, but they all share the same application of procedural law found in Book VII of the Code. This workshop will give you a detailed and practical explanation of the law and method of carrying out these instructions, with a focus on gathering testimony and evaluating proofs to assist you in gathering evidence that will aid the judges in reaching an understanding of the truth.

This workshop will be divided into two tracks with timed sessions. You may switch between tracks according to your interest.

### **Track 1: Instructing a Declaration of Nullity Case**

*Lynda Robitaille, JCD*

The focus is on gathering evidence that can give rise to moral certainty. This track will focus on the gathering of evidence as well as the proofs required for specific grounds and will conclude by examining specific questions in light of the proofs required for different grounds. Participants are encouraged to bring their tribunal's basic questionnaire and/or questionnaires for specific grounds to work toward considering and/or refining their tribunal's questions as a result of knowledge learned in this track.

### **Track 2: Instructing a Penal Trial and a Cause for Canonization**

*Rev. Msgr. Jason Gray, JCD*

This track will focus on two areas. In the penal trial, attention will be given to investigating ordinary delicts and the reserved more grave delicts, approaching a witness, the right of defense of the accused, and delicts involving the confessional.

In causes of canonization, we will examine recent developments and instructions from the Dicastery for the Causes of Saints. We will review in detail the exacting process for gathering the comprehensive information required for a successful cause, with English translations of some sample documents presented by the Dicastery in Italian.

# Workshop Schedule

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This schedule is preliminary and may be modified. Your presenters will provide any updates onsite.

## **Saturday, October 12, 2024**

5-6:30 p.m. Pre-Convention Workshop Attendee Check-in

## **Sunday, October 13, 2024**

7:30 a.m. Sunday Mass ..... Whyte Room

8:00 a.m. Pre-Convention Workshop Attendee Check-in ..... Pavilion Landing  
Continental Breakfast  
for Pre-Convention Attendees (*badges req'd*) ..... Fiesta/Enchantment AB Foyer

9:00 a.m. Joint Session: Common Elements in  
Instruction of Different Causes ..... Enchantment C-F

10:30 a.m. Break ..... Fiesta/Enchantment AB Foyer

10:50 a.m. Track 1: Proofs Required for the Different Grounds of Nullity  
Track 2: Instruction of a Penal Trial

12 noon Lunch on your own

1:30 p.m. Track 1: Proofs Required for the Different Grounds of Nullity (*cont.*)  
Track 2: Special Cases in a Penal Trial

3:00 p.m. Break

3:20 p.m. Track 1: Looking at Jurisprudence Regarding Proofs  
Track 2: Diocesan Inquiry in Causes of Saints

5:00 p.m. Workshop ends for the day

5:30 p.m. Reception for Pre-Convention Attendees (*badges req'd*) ..... Pavilion Court

## **Monday, October 14, 2024**

7:30 a.m. Mass ..... Whyte Room

8:00 a.m. Continental Breakfast  
for Pre-Convention Attendees (*badges req'd*) ..... Fiesta/Enchantment AB Foyer

9:00 a.m. Joint Session: The Canonical Art of Searching for the Truth

10:00 a.m. Break ..... Fiesta/Enchantment AB Foyer

10:20 a.m. Track 1: Examining Diocesan Questionnaires  
Track 2: Diocesan Inquiry in Causes of Saints

12 noon Workshop concludes

# Convention Schedule

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## **Monday, October 14, 2024**

- 7:30 a.m. Mass ..... Whyte Room
- 1:00 p.m. Convention Attendee Check-in Begins..... Pavilion Landing  
Exhibits Open..... Pavilion Court
- 4:00 p.m. Evening Prayer and Welcome..... Grand Pavilion  
*Remarks: The Most Reverend John C. Wester, Archbishop of Sante Fe  
The Very Reverend Kenneth A. Riley, JCL, CLSA President*
- 4:30 p.m. Keynote Address..... Grand Pavilion  
**Is the Fourth Estate Essential for Justice in the Church?**  
*Presenter: Ms. Helen Osman*
- 6:00 p.m. Opening Reception for Convention Attendees (badge required)..... Pavilion Court

## **Tuesday, October 15, 2024**

- 7:30 a.m. Mass for the Deceased Members of the CLSA..... Whyte Room
- 8:00 a.m. Continental Breakfast for Convention Attendees (badge required)  
Candidate Meet & Greet ..... Pavilion Court  
*View candidate videos on the 2024 Convention web page.*
- 9:00 a.m. Seminars  
**A1. The Instruction *Dignitas connubii* at Twenty Years:  
A Tool for Addressing Enduring Procedural Challenges** ..... Enchantment C-F  
*Presenter: Prof. William L. Daniel, JCD*  
  
This Instruction issued by the Apostolic See in 2005 continues to enjoy binding force to the extent that it is not contrary to the 2015 reform of the canons on causes of matrimonial nullity. It addresses several elements of the process that regularly pose difficulties in tribunals—such as the proper way to gather proofs, carry out rogatorial commissions, and exercise the office of defender of the bond. It also has didactic value concerning the declarative nature of the process and the diligent exercise of judicial offices.

**A2. How to Make a Saint:**

**The Structural Elements of a Cause for Canonization**.....Fiesta

*Presenter: Rev. Msgr. Jason Gray, JCD*

This presentation will review the norms for initiating and pursuing a Cause of Canonization, including the roles and responsibilities for each of the officials who participate in the process. Practical guidance will be provided, including pitfalls to avoid, as well as recent updates about the role of postulators and the development of the new ground for canonization on the offering of life. English translations will be provided of various Italian templates published by the Dicastery. This presentation will provide a more global overview of the process, different from the in-depth analysis of the instruction of a Cause provided in the pre-convention workshop.

**A3. Organization of Churches *sui juris* in**

**Canada and the United States** .....Enchantment AB

*Presenter: Rev. Alexander Laschuk, JCD, PhD*

Syrian, Syro-Malabar, Syro-Malankar – what’s the difference? Why are there three Catholic bishops of Toronto? Whose faithful are these, anyway? When should I bother the nunciature? And what’s with all the hats? This seminar will examine the historical emergence of overlapping Catholic hierarchies in North America, the current ecclesiastical landscape, and the importance of these jurisdictions for both canonical and pastoral ministry in today’s Church.

**A4. Sacramental Issues Concerning Transgender Persons** ..... Grand Pavilion

*Presenter: Most Rev. Thomas Paprocki, JCD*

The term “transgender person” does not appear in the 1983 *Code of Canon Law* and did not even arise as a pastoral or canonical concern until recent years, yet the issue now arises with greater frequency and urgency as transgender persons present themselves as sponsors and candidates for the sacraments, especially Baptism and Holy Orders. This session will discuss how to handle such requests in a way that is pastorally sensitive yet canonically correct.

10:30 a.m. Break..... Pavilion & Enchantment/Fiesta Foyers

11:00 a.m. Seminars

**B1. What is Psychopathology? The Human Person as Broken and Redeemed, Flawed and Healed**..... Fiesta

*Presenter: Dr. Ann G. Howe, PhD*

Clinical psychology is at its core a field dedicated to helping define and treat what is generally termed psychopathology. Building on general psychology, clinical psychology, especially in America, grew exponentially to address the needs of a society in transition post-WWII. Yet, in response to the need to help individuals with mental disturbances, the field neglected to build a foundation for itself. In recent years, under the heading of positive psychology and most recently a Catholic Christian meta-model of the person, progress has been made to clarify what constitutes normality and abnormality, based upon an appropriate anthropological understanding of the human person.

**B2. Beyond Netiquette: Canonical and Civil Law Issues in the (Mis)Use of Social Media** ..... Enchantment C-F

*Presenter: Mr. Benedict Nguyen, JCL, JD*

The 21st century continues to see a proliferation of ever-newer means of social communications that afford immense opportunities for information, connectivity, and new and exciting opportunities for spreading the Gospel. Beginning with the foundation of the canonical right and duty of the Christian faithful to evangelize, this presentation will examine canonical issues that may arise with the misuse of social communications, focusing particularly on use of social media by clerics. Particular attention will be given to related issues of free speech, reputation, defamation, libel, and slander as related to both canon law and civil law.

**B3. The Society of Saint Pius X: Current Status and Concessions Granted for the Faithful** ..... Grand Pavilion

*Presenter: Very Rev. John G. Lessard, JCD, PhD*

What is the status of the SSPX? Are they in schism? Can their priests absolve? Do their Masses fulfill the Sunday obligation? Are their weddings valid? These practical questions will be addressed from a juridic standpoint, with the intention of offering clarification for canonists and the faithful at large.

**B4. Nobody's Perfect: Can. 279 and the Right-Duty of Clerics to Ongoing Formation**..... Enchantment AB

*Presenter: Very Rev. Emmett Hall, VF, JCL*

A cleric's formation is not complete upon ordination, but merely sufficient (one hopes) to begin sacred ministry. The primary source of post-ordination formation is the ministry itself, and clerics will benefit from intentional integration of their ministerial experiences, alongside acquisition of further knowledge of the sacred sciences and pastoral methods. This presentation will benefit both clerics seeking ongoing formation and for those tasked with providing it.

12:30 p.m. Lunch on your own  
1:30 p.m. USCCB Forum..... Grand Pavilion

*Presenter: Most Rev. Thomas Paprocki, JCD, Chair, USCCB Canonical Affairs Committee*

2:30 p.m. Seminars

**C1. The Despair of Procrastinating Heritage:  
The Temporary/Conditional Exclusion of the *Bonum Prolis*..... Fiesta**

*Presenter: Mr. Thomas Sundaram, JCL, MA Phil., MA Theo*

The temporary/conditional exclusion of the *bonum prolis* per canon 1101 §2 of the current Code is anticipated in (and even prior to) the 1917 *CIC*'s consideration of the human natural capacity to condition consent, as an invalidating condition contrary to the essence of marriage itself, whether absolute or conditional. This will be an examination of related jurisprudence impacting the differential procedural investigation of such claims, informed by various material realities in 21st century American canonical practice and internationally, to provide an “enfleshed” pastoral consideration resting upon the foundation of the canonical understanding of consent and the human intellect and will.

**C2. National Statutes for the Christian Initiation of Adults:  
New Particular Law for the United States..... Grand Pavilion**

*Presenter: Very Rev. John J.M. Foster, JCD*

While retranslating the typical edition of the OCIA, the USCCB undertook a revision of its 1986 National Statutes for the Catechumenate. This seminar will examine the development of the process to revise the NSC and provide an initial commentary on the new National Statutes for the Christian Initiation of Adults.

**C3. Canonical Impacts of Immigration Law and  
DACA in the United States**.....Enchantment AB

*Presenter: Dcn. Matthew Glover, JD, JCL*

Immigration law in the United States is ever evolving. DACA recipients remain in a kind of civil law limbo, and the rules for R-1 visa holders and applicants for Green Cards can change month to month. These civil law issues can have corresponding canonical and administrative impacts—both on the individual’s status and on their ministerial assignments in the Church. This seminar will examine those issues and impacts and then consider the potential practical options when facing them.

**C4. Special Faculties Revisited** ..... Enchantment C-F

*Presenter: Dcn. David Keene, JCL*

More than a decade ago, colleagues at the Archdiocese of Chicago presented a paper on the “Application of the Special Faculties” issued in 2010 by the Congregation for the Clergy. Since the issue of these instructions subsequent legislation including a revised Chapter VI of the Code of Canon Law has been introduced. This presentation will focus on our current best practices and experience in working with these changes and hopefully provide a roadmap for those venturing into working with the Special Faculties.

- 4:00 p.m. Break..... Pavilion & Enchantment/Fiesta Foyers
- 4:30 p.m. Budget Report & Open Hearing on Resolutions..... Grand Pavilion
- 6:00 p.m. Alumni Receptions
  - Catholic University of America .....Whyte Foyer
  - Leuven.....TBD
  - St. Paul University .....Sierra Vista
  - Rome Universities..... Lobby Bar
- 7:00 p.m. Presidential Dinner (*by invitation*)

**Wednesday, October 16, 2024**

- 7:00 a.m. Friends of Bill W. Meeting .....Sierra Vista
- 7:30 a.m. Past Presidents’ Breakfast (*by invitation*) .....Enchantment AB
- 8:00 a.m. Continental Breakfast for Convention Attendees  
(badge required) ..... Pavilion Court
- 9:00 a.m. Major Address..... Grand Pavilion

**Key Issues in the Event of a Revision of the General Norms**

*Presenter: Rev. Ulrich Rhode, SJ, JCD*

Like the other books of the Code, the General Norms deserve to be reviewed to determine whether they need to be adapted to changing circumstances. These circumstances include the progress of legal theories in general (*e.g.* in relation to juridical and administrative acts), a growing awareness of the Eastern Catholic Churches (and of the differences between the two Codes of the Catholic Church), developments in Church doctrine (*e.g.* in relation to synodality), new approaches to Church governance (*e.g.* in relation to the appointment of non-ordained faithful to governance positions) and also technological advances (such as the digital revolution).

- 10:30 a.m. Break .....Pavilion Foyer
- 11:00 a.m. Eighty-Sixth Annual Business Meeting..... Grand Pavilion
- 12:30 p.m. Lunch on your own
- 1:30 p.m. Second Instance Judicial Vicars’ Meeting ..... Fiesta  
Chancellors’ Meeting .....Enchantment AB
- 2:30 p.m. Seminars

**D1. Repeat Seminar: The Instruction *Dignitas connubii* at Twenty Years: A Tool for Addressing Enduring Procedural Challenges .... Grand Pavilion**

*Presenter: Prof. William L. Daniel, JCD*

**D2. Care for Childhood Trauma Survivors and Their Helpers ..... Fiesta**

*Presenter: Rev. Kenneth Schmidt, JCD*

Childhood traumatic events have deep and long-lasting impacts. Caring for the survivors can also lead to secondary trauma. This presentation will help participants understand the results of traumatic events and how to provide pastoral care for the survivors and their helpers.

**D3. Consecrated Life:**

**Current Reality and Future Options** .....Enchantment AB

*Presenter: Sr. Bonnie MacLellan, JCD*

Actuarial studies of religious institutes in the developed world have identified a steep decline in membership and limited options for leadership in the future. What are the canonical options for possible reconfiguration of consecrated life to meet these demographic and faith challenges? Could recent recommendations of the Holy See assist congregations moving into the future with a sense of gratitude and hope vs. a vision of decline and death? The presentation will include the work to date of the Ontario Pontifical Religious Institutes Steering Committee as they attempt to collaboratively design canonically appropriate governance models to support new models of consecrated life into the future.

**D4. Repeat Seminar: Sacramental Issues Concerning**

**Transgender Persons** ..... Enchantment C-F

*Presenter: Most Rev. Thomas Paprocki, JCD*

- 5:00 p.m. Liturgy and Installation of Board of Governors .... Immaculate Conception Church  
See next page for more information.
- 6:30 p.m. Reception ..... Grand Foyer
- 7:30 p.m. Annual Banquet and Role of Law Presentation ..... Grand Pavilion

***Thursday, October 17, 2024***

- 7:30 a.m. Mass ..... Whyte Room
- 8:00 a.m. Continental Breakfast for Convention Attendees  
(badge required) ..... Pavilion Court
- 9:00 a.m. Major Address ..... Grand Pavilion

**The Doctrine of Discovery and the Ministry of Justice**

*Most Rev. Douglas J. Lucia, JCL*

This presentation will focus on the 16th century Doctrine of Discovery and its impact on modern jurisprudence. We will trace both the development, along with the repudiation of this doctrine, as seen in codes of law. Specifically, we will examine the Ministry of Justice in light of Canon 1397.1 of the present Code of Canon Law and the question of expiatory penalties. Finally, we will consider how this topic can lead us to deeper dialogue in our 21<sup>st</sup>-century society and how it has the potential to lead us to a kinder future.

- 10:30 a.m. Closing Remarks

## ***Liturgy and Installation of Board of Governors***

**When:** Wednesday, October 16, 5:00 p.m

**Where:** Immaculate Conception Church  
619 Copper Ave. NW

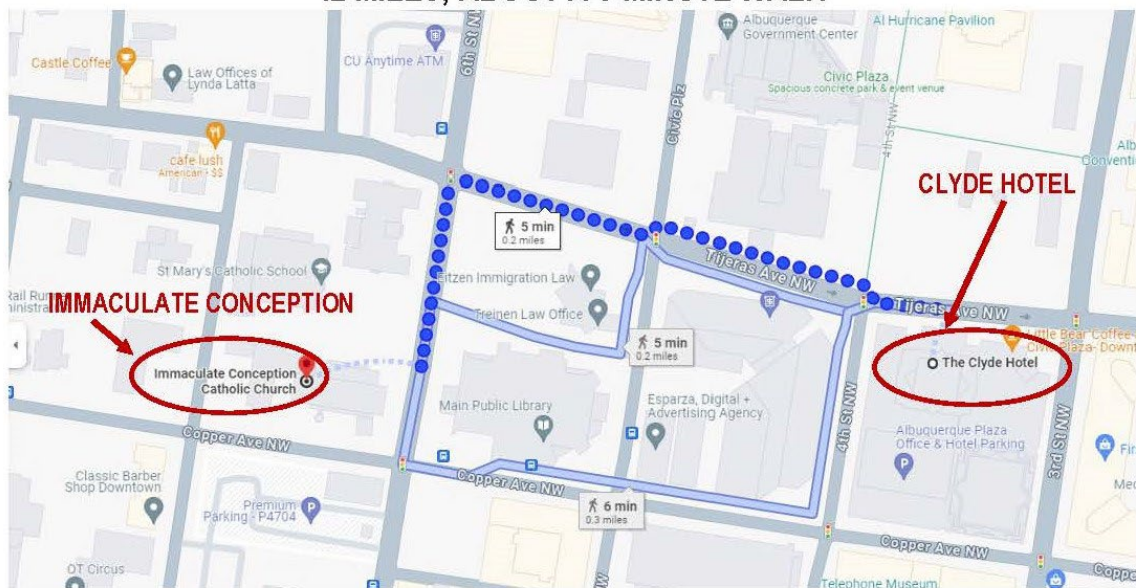
**Shuttle:** The shuttle will leave from the front of the hotel at 4:15, 4:30, and 4:45 p.m.  
After the Convention Mass and Installation, the shuttles will resume.

**Walking:** The church is approximately a .2 mile (or 5-minute) walk from the Clyde Hotel.  
Head West on Tijeras Avenue, NW for two blocks.  
Take a left on 6<sup>th</sup> Street, NW.  
The church is at the end of the block, on your right.

**Vestments:** Please bring your vestments with you. Vesting will take place in the school gym next to the church.

**After:** The reception will begin at 6:30 p.m., and the banquet at 7:30 p.m. Coat racks will be available outside the Grand Pavilion to hang vestments during the reception and banquet.

### **WALKING MAP TO WEDNESDAY EVENING INSTALLATION MASS .2 MILES; ABOUT A 5-MINUTE WALK**





# Candidates for Office

## Office of the Vice President/President-Elect

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**DR. DIANE BARR**

Chancellor  
Archdiocese of Baltimore

### Education

- JCD, St. Paul University, Ottawa
- JD, College of Law, University of Idaho
- Mediation Certificate—CDR Associates

### Ministerial Experience

- Chancellor, Archdiocese of Baltimore
- Investigations of clergy for allegations of abuse of children or adults and *VELM*, 2008-present
- Canonist to all Archdiocesan Consultative Entities and Independent Review Board, Health Ethics Board
- Previously, Court Administrator/Judge, Metropolitan Tribunal of Atlanta
- Previously, Director of the Office of Canonical Affairs, Diocese of Boise
- Visiting Lecturer at St. Paul University
- Canonical Consultation with individuals, dioceses, and religious institutes

### Service to the Society

- Member since 1984
- Presenter in seminars and pre-convention workshops on canonical issues including advocacy, ethics, sexual abuse of minors, civil legal concerns, finance, and other issues (2022, 2021, 2019, 2017, 2016, 2011, 2007, 2006)
- Chair, Research and Development (2017-2021), Nominations, Canon Law-Civil Law & Advocacy Procedures Committees
- Member, *Vos Estis Lex Mundi* (2022-2023), IT (2018-2021), Propose Changes in Marriage Law, Protection of Rights in the Church, Laity, and Due Process Experiment Committees
- Member, Task Force on Canonical Questions of Sexual Abuse (2002-2006)
- Contributor, CLSA Commentary
- Member, Board of Governors (1995-1997)



**DR. EILEEN JARAMILLO**

Canonical Consultant  
Adjunct Faculty  
Lansing, Michigan

### Education

- DMin, Ecumenical Theological Seminary
- JCL/MCL, St. Paul University, Ottawa
- MDiv, SS. Cyril & Methodius Seminary
- MA, Theology, Aquinas College

### Ministerial Experience

- Working on situations with Dicasteries
- Canonical visitations
- Often consulted by clerics, religious, laity (various countries)
- Extensive administrative experience
- Adjunct Faculty for three universities and three seminaries
- Many seminars: national/international; general chapters; clerics
- Ponens on marriage cases; Dioceses of Columbus, Lansing (1991-2015)
- Judge Instructor on Favor of the Faith cases (1991-2015)
- Chair of Diocesan Committees
- Sexual Misconduct Review Board Member
- Advocate for clerics regarding allegations of sexual abuse
- Translator of Spanish documents
- Co-author of *Christ is All and in All* (Eastern Churches)
- Many publications in various journals and on Academia.edu

### Service to the Society

- Member since 1990
- Proposed resolutions
- Chapter in *The Tribunal Handbook*
- Entries in *RR* and *CLSA Advisory Opinions*
- Consultor, Board of Governors (2006-2008)
- Chaired Professional Responsibility (2006), Nominations (2008), Consecrated and Apostolic Life (2020) Committees
- Various convention seminars
- Co-editor of *Procedural Handbook for ICLSAL* (2021)

# Candidates for Office

## Office of the Consultor

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**SR. JANICE GROCHOWSKY, CSJ**

Chancellor and Director of the Tribunal  
Diocese of Dodge City

### Education

- JCL, The Catholic University of America
- BA, Kansas Newman College, Wichita, KS
- AS, Emporia State University, Emporia, KS

### Ministerial Experience

- Diocese of Dodge City: Tribunal Ministry (1999 to present); Director of Tribunal (2002 to present); Chancellor (2003 to present)
- Canonical Advisor to Bishop, priests, parish staffs, Diocesan Review Board (2003 to present)
- Defender of the Bond, Diocese of El Paso (2022 to Present)
- Defender of the Bond, Diocese of Kansas City-St. Joseph (2017-2022)
- Second Instance Judge, Archdiocese of San Antonio (2015-2020)
- Second Instance Judge and Defender of the Bond, Diocese of Wichita (2004 to present)
- Assistant Tribunal Secretary, Diocese of Wichita (1997-1999)

### Service to the Society

- Member since 2001

### Other Relevant Experience

- Chapter Planning Committee, Congregation of St. Joseph (2022-2023)
- Tending the Talents Leadership Development (2011-2012)
- Pastoral Associate, St. Mary Parish, Derby, KS (1991-1997)
- Pastoral Associate, St. Mary Parish, Newton, KS (1989-1991)



**DR. FELIX MENEDEZ**

Diocesan Judge  
Metropolitan Tribunal of Atlanta

**Ordained:** Deacon, Oviedo (2005); Presbyter, Oviedo (2006).

**Dispensed from Clerical State:** 2015. I am aware that some may think that this disqualifies me for office, which I respect and understand. I am disclosing it for transparency and to avoid confusion or suspicion. I have never been accused of a crime, have always been in good standing, and have enjoyed the continuous support of the Mother Church.

### Education

- STL, San Dámaso, Madrid, Spain
- JCD, San Dámaso, Madrid, Spain
- MA, International Relations, Eichstätt-Ingolstadt, Germany

### Ministerial Experience

- Notary, Madrid (2013)
- Judge, Hartford (2017)
- Judge, Atlanta (2018-present)

### Service to the Society

- Member since 2018
- Research and Development Committee (2019-2022)
- Convention Planning Committee (2023-2026)
- Convention presenter: *Not a Ground. The Case Against Determining Error* (2023)

### Other Relevant Experience

- Translator from English, Italian, German, French, and Latin, including:
  - De Paolis, General Norms
  - Coccopalmerio, The Parish
  - Ratzinger, Complete Works, IV vol.
- YouTuber hobbyist. Creator of the bilingual series *Cómo obtener la nulidad matrimonial/How to Get an Annulment*

# Candidates for Office

## Office of Consultor

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**VERY REV. PETER MOTTOLA**

Judicial Vicar  
Diocese of Rochester

**Ordained:** Priest of the Diocese of Rochester, 2013

### Education

- JCD/PhD studies, Saint Paul University (current)
- STB, M.Div., MA, JCL, The Catholic University of America
- BS, Rochester Institute of Technology

### Ministerial Experience

- Judicial Vicar, Diocese of Rochester, 2021-present
- Pastor, 2017-present
- Adjunct Professor, St. Bernard's School of Theology and Ministry, 2016-present

### Service to the Society

- Member since 2016
- Co-editor, *Clergy Procedural Handbook, Revised Edition* (forthcoming), with Donna Miller & Timothy Olson
- Convention presenter, ERCC 2024 (*Special Faculties*)
- Member, Publications Advisory Board, 2023-present
- Convention presenter, 2023 (*Traditionis custodes*)
- Chair, *ad hoc* Committee on Canonist Wellness, 2022-2023
- Chair, Committee on Clergy, 2021-2022
- Member, *ad hoc* Committee on Canonist Wellness, 2021-2023
- Member, Committee on Clergy, 2019-2022
- Contributor & translator, *Roman Replies and CLSA Advisory Opinions* (2017, 2020, 2023)

### Other Relevant Experience

- YouTube video: "Gather Us In (Latin Translation)," 2010 (32,000 views)
- Webmaster, Diocese of Rochester, 2007-2008



**MEG ROMANO-HOGAN**

Diocese of Dallas

### Education

- JCL, The Catholic University of America
- STB, Angelicum
- MA, University of St. Thomas, Houston

### Ministerial Experience

- Defender of the Bond, Diocese of Laredo, Archdiocese of Seattle, present
- Advocate, Diocese of Dallas, present
- Writer, Diocese of Little Rock, 2016-2018
- Writer, Archdiocese of Oklahoma City, 2016-2018
- Director of the Tribunal and Judge, Diocese of Fort Worth, 2007-2014
- Advocate, Appellate Court for the Dioceses of Texas, 1996-2001
- Judge, Diocese of Dallas, 1989-1994
- Writer, Archdiocese of Galveston-Houston, 1998-2004
- Defender of the Bond, Diocese of Great Falls-Billings, 1994-2001

### Service to the Society

- Chair, Research & Discussion Committee, 1994-1995 (member 1992-1995)
- Chair, Convention Planning Committee, 2006-2007 (member 2003-2007)
- Consultor, Board of Governors, 2009-2012
- Chair, Nominations Committee, 2014-2016 (member, 2013-2016)

### Other Relevant Experience

- Consultant, Appellate Court for the Dioceses of Texas, 2015-2017
- Consultant, Tribunal of the Archdiocese of Oklahoma City, 2015-2016
- Director of Religious Education, Our Lady of Angels Catholic Church, Allen, 2004-2007
- Director of Pastoral Services for Marriage, St. Thomas Aquinas Church, Dallas, 2015- 2023

## ***Presenters***

### ***Pre-Convention Workshops***

Rev. Msgr. Jason Gray, JCD, Judicial Vicar, Diocese of Peoria

Lynda Robitaille, JCD, Dean of Theology, St. Mark's College, Vancouver

### ***Major Addresses***

Most Rev. Douglas J. Lucia, JCL, Bishop of Syracuse

Ms. Helen Osman, President, World Catholic Association for Communication (SIGNIS)

Rev. Ulrich Rhode, SJ, JCD, Dean of the Faculty of Canon Law, Pontificia Università Gregoriana

### ***Seminars***

Prof. William L. Daniel, JCD, Associate Professor of Canon Law, The Catholic University of America

Very Rev. John J. M. Foster, JCD, Episcopal Vicar for Temporal and Canonical Affairs and Judicial Vicar,  
Diocese of Stockton

Dcn. Matthew Glover, JD, JCL, Chancellor for Canonical Affairs and In-House Counsel, Little Rock

Rev. Msgr. Jason Gray, JCD, Judicial Vicar, Diocese of Peoria

Very Rev. Emmett Hall, VF, JCL, Pastor, St. Elizabeth of Hungary Parish

Dr. Ann G. Howe, PhD, Court Expert for the Metropolitan Tribunal of Atlanta; Consultant to the Victim  
Assistance Program and the Office of the Permanent Diaconate, Archdiocese of Atlanta

Dcn. David Keene, JCL, Chancellor, Archdiocese of Chicago

Rev. Alexander Laschuk, JCD, PhD, Judicial Vicar, Toronto Regional Tribunal

Very Rev. John G. Lessard, JCD, PhD, Adjutant JV, Promoter of Justice, Chancellor, Diocese of  
Springfield, MA

Sr. Bonnie MacLellan, JCD, General Superior

Mr. Benedict Nguyen, JCL, JD, Assistant Vice President for Student Affairs, University of St. Thomas,  
Houston

Most Rev. Thomas Paprocki, JCD, Bishop of Springfield in Illinois

Rev. Kenneth Schmidt, JCD, Judicial Vicar, Diocese of Kalamazoo; Clinical Director, Trauma Recovery  
Associates

Mr. Thomas Sundaram, JCL, MA Phil., MA Theo., Instructing Judge, Archdiocese of Portland in Oregon

# 2024 Annual Reports Booklet





REPORT OF THE PRESIDENT  
*Very Reverend Kenneth A. Riley, JCL*

Welcome to Albuquerque!

Having attended these conventions for over 20 years now, I continue to be amazed by the enriching opportunities for learning about both content (admittedly, at various levels of interest or need) and about networking with seasoned and new canonists and those engaged in the law alike.

Since our large gathering in Milwaukee last year with 411 registrants, as I write this in mid-September with registration still growing; we are nearly at that number. Wow! This level of interest clearly demonstrates how valuable a membership in the CLSA proves to be for both members and friends. There is much that the CLSA staff, Nix & Associates, the Convention Planning Committee and Convention Chair along with the great work of local canonists and their teams have done and continue to do to make these conventions enjoyable, memorable, and fruitful—thank you!

The CLSA completed a Memorandum of Understanding with our sister society, the Canadian Canon Law Society, for a joint convention next year in Orlando--a first since 2010 in Buffalo, New York. Although I have not had the pleasure of joining our northern neighbors for a convention they host, I was privileged in September 2023 to be the CLSA representative to the Canon Law Society of Australia and New Zealand in Christchurch, New Zealand.

Additionally, in April-May of this year, I had the honor to participate in the Canon Law Society of Great Britain and Ireland conference in Krakow, Poland. Although both conventions are much smaller in numbers of participants than our own, these societies happily welcome CLSA members to their conventions to experience ongoing canonical work worldwide, including scholarship and publication.

As I reflect on my term as President, I recall that as a candidate for election, I hoped to provide more engagement for our members. Active members are now invited to nominate individuals for consideration to be recognized with the Role of Law award given annually at our convention. In fact, nominations are open now – through March 1, 2025 – for the 2025 award, and I encourage you to review the criteria and consider if you know someone who might be a potential nominee.

Our online special-interest groups allow members to stay in touch all year long. If you haven't joined or participated in this member benefit, I invite you to join the conversation online. To encourage additional engagement at this convention, we are sponsoring a BINGO mixer with three cash prizes randomly drawn from timely completed entries as a door prize at Wednesday's banquet.

I have also worked this year to raise awareness for the work the Society does, particularly as a way to ensure good governance for the future. To do this, the Board of Governors (BOG) focused this year on generating clear and realistic job descriptions and well-articulated expectations for BOG officers, consultants, and committee chairs. The BOG's goal is to share this information with

potential candidates on the corporate, civil, and canonical responsibilities and realistic time and schedule commitments for members when they are invited to stand for election.

With input from the BOG, I have appointed three consultants to the Committee on Nominations. This constitutional action was undertaken to assist an engagement of a wider network of canonists known by region, education, and experience in discerning possible candidates for consideration of potential CLSA leadership.

In addition to the annual February New Member Orientation, which was offered online, the CLSA hosted a requested synod listening session, which produced a report that was sent to the General Secretariat of the Synod and was made available to our membership online. After requests by Synod participants and for historical research purposes as well, the BOG determined to make this report available *gratis* on the CLSA website to visitors with the provision to be published in the 2024 issue of *Roman Replies and CLSA Advisory Opinions*.

As my office nears the end, I would like to make a few personal requests. If our members could assist our CLSA office with updates on deceased members, lapsed members, retired members, any changed status you know, such efforts will assist the CLSA to keep its database information current and accurate. Timely notification assists mailing, communication, and other budgetary costs. Your assistance in building and updating membership is greatly appreciated!

Additionally, there is an ever-increasing need to balance newer canonists and seasoned ones on committees for the betterment of our canonical efforts and experience. There remains a need for ongoing leadership development opportunities and experience for committee chairs and members prior to the submission of potential BOG nominations. I continue to be convinced that the CLSA benefits from more canonists in leadership roles than fewer. While a continuous tension exists between our finances and our (desired) services, real progress and funding sources will be necessary to update the research database digitally and for authorized CIC publications and other offerings. Many still enjoy leafing through a book in hand while others prefer more accessibility of digital resources either on the go or in the office.

I want to thank a tireless BOG, whose members continue to put the best interests of the CLSA as their priority. The BOG's fiduciary responsibilities are profound. Most particularly, I wish to thank outgoing Past President Rev. John Donovan and Consultors Sr. Tracey Sharp, SCRH and Dr. David Castronovo for their dedicated service. My gratitude would be inadequate if I did not include my sincerest thanks for the singular and incalculable value and service – and vast hours above and beyond their normal work week – of our staff, Kathleen Butler, Donna Miller, and Mark Francisco, whose dedication to the CLSA continues to astound me and the BOG as well! Thank you!

Finally, I would like to express again my gratitude for the trust placed in me to have served as President this past year. Although I have included the officers, members, staff, and friends of the CLSA in my daily prayers for years, this year I offered a monthly Mass intention for the members of CLSA, praying that God would bless all of us in our canonical endeavors in the search for and service of truth and the salvation of souls.

## REPORT OF THE TREASURER

*Very Reverend Jamin Scott David, JCL*

Given the financial strains that have become part of the landscape of our economic reality these past several years, a good laugh can often help make light of quite challenging situations. Someone told me a joke that will help me frame my annual report to the Society. It goes something like this: “After I spoke to my financial advisor, I slept like a baby. I woke up every hour and cried!”

For the Canon Law Society of America, though, if any tears are shed, could these tears become tears of joy?! Obviously, we continue to encounter an ever-changing financial landscape that might best be described as a roller-coaster. The Board of Governors and our staff continue to be good stewards. Without such foresight, though, the Society is only one hump away from a quick slide down toward a declining precipice. Some of these concerns lie buried in the following fiscal reports; others can be seen in the reports of my contemporaries (such as in the metrics also reported regarding membership by the General Secretary and the fiscal impacts on the CLSA).

Financially over the past few months, we have seen a combination of higher interest rates combined with moderating but troubling inflation. These trends are nothing new in the ebb and flow of the American economy and surface with some degree of regularity. At the same time, economic irregularity serves as a reminder for all to navigate through uncertainty and near-term challenges to find opportunities to grow and change moving forward.

Pause for a moment and think about how much has changed in your lifetime be it technology, or the Church, or this august Society. Change often seems to happen at breakneck speed, and many are left to simply ask, “What will be next?” More conversations about generative AI, transitions to cloud-based systems, and cyber risks and concomitant potential collapse – these all litter the news. While change can be threatening, change also offers strategic options to capture the breeze and utilize even changing winds as an advantage.

Finance can be a catalyst for progress, and I believe that conversations about the Society’s assets can help us manage the change that we currently are encountering. Notice in the reports in this convention booklet the desire to transform the CLSA. Much work has been done by the Strategic Visioning Task Force to make concrete recommendations to chart a path forward. For example, there is obviously a need for the Society to harness technology in a better way to provide our rich and dynamic resources to consumers digitally, not to generate a boon in profit, but to educate, inspire, and inform others.

When on this roller-coaster of financial uncertainty, one can easily wake up on the hour and “cry,” or our financial considerations, discipline, and stewardship can be the beginning of the revelation of a robust future filled with great hope, creating new products and services that pivot the Society to be at the forefront of the canonical sciences.

The following pages contain the actual numbers that demonstrate the financial reality of the Canon Law Society of America. This Treasurer would be remiss if credit were not given to the prudent stewardship of our staff – Kathleen, Donna, and Mark – and the wise conversation and counsel from our Board of Governors. Income from membership recruiting and retention continues to change like a rollercoaster; participation at the 2023 annual convention was extraordinary. Printed publications – the backbone of our income for decades – continue to evolve, and decreasing

quantities of published work, continue to economically impact the Society. The lack of scheduled publications for printing coupled with higher convention costs will dramatically impact the “bottom line” moving forward, resulting in negative cash flow. But is this the invitation to begin a new era in life, work, and ministry in the Church and the CLSA?

A few words about the numbers you will find in these reports:

Generally, market volatility has positively adjusted this year as compared to the last, contributing to better-than-anticipated gains for investments.

The budget for the 2024/2025 fiscal year – forwarded by the Resource and Asset Management (RAM) Committee to the Board of Governors and subsequently approved, includes revenue primarily generated from membership dues, investment income, conference fees, and minimal publication sales. Anticipated expenses primarily include expenses related to the annual convention, Board of Governors and committee work, publication expenses including storage and shipping, salaries, and operating expenses, and moving cash back into investments. A notable deficit is evident, and this is done so intentionally to show the Society’s members the necessity of rethinking the ‘conventional’ to prepare for the future.

There is still a desire to grow the investment corpus for scholarships for both the JCL and JCD funds to highlight the need to educate more canonists. At the President and Treasurer’s request, every member of the Board of Governors contributed in 2023 and 2024 to the Scholarship Fund. Please again consider generously contributing to this important work of the CLSA!

Finally, the Society has made concerted efforts to reduce the costs of the convention. Some changes in 2024 include a print-on-demand option for the usual convention booklet (with costs passed to those wishing to have a printed copy), and next year’s discontinuation of the usual convention tote bags. The BOG continues to investigate further ways to reduce costs for the annual convention, including the consideration that the number of host cities be limited. This year, work will continue with the RAM, the BOG, and our staff to recreate investment strategies and discern other ideas for cost savings to make us as effective and efficient as possible.

Please do not hesitate to ask if you have any questions about our financial statements or the attached financial review. (No anomalies were found in this review – another reason not to cry! – and cash flow is sufficient to maintain our obligations in the short term. The report of the auditor is contained in this booklet and will be printed in the 2024 *Proceedings*). Yet, on this rollercoaster, while we may be climbing one moment, hold your breath for what might come next. Such is a call to be prudent and to prepare.

On a personal note, I am grateful for your trust in my service to the Society as its Treasurer! I have participated in every convention since beginning studies in Canon Law at The Catholic University of America, and I always look forward to these opportunities to learn and to network. The foundation of our success with the CLSA rests with your work and diligence. Challenges will continue to be encountered, but I know that the next decades of our ministry and work will be the cause of our rejoicing if we partner toward a future filled with hope!

# Canon Law Society of America

## Balance Sheet

As of June 30, 2024

	TOTAL
<b>ASSETS</b>	
Current Assets	
Bank Accounts	
1010 TD Operating Account - 9622	204,842.02
1050 Cash Box	414.70
<b>Total Bank Accounts</b>	<b>\$205,256.72</b>
Accounts Receivable	
Accounts Receivable (A/R)	4,743.82
<b>Total Accounts Receivable</b>	<b>\$4,743.82</b>
Other Current Assets	
1400 Prepaid Expenses	0.00
1410 Prepaid/Rent Insurance	448.80
1420 Other Prepaid Expenses	4,942.26
1422 Other Prepaid Ex (Convention)	61,593.76
<b>Total 1400 Prepaid Expenses</b>	<b>66,984.82</b>
1500 Inventory Asset	
1510 Inventory - Books & CDs (Pub)	15,965.01
1520 Commentary	74,133.33
<b>Total 1500 Inventory Asset</b>	<b>90,098.34</b>
Undeposited Funds	7,175.00
<b>Total Other Current Assets</b>	<b>\$164,258.16</b>
<b>Total Current Assets</b>	<b>\$374,258.70</b>
Fixed Assets	
1700 Fixed Assets	
1710 Furniture and Equipment (Ops)	31,471.00
1720 Technology Equipment	8,301.92
1790 Accumulated Depreciation(contra)	-31,742.58
<b>Total 1700 Fixed Assets</b>	<b>8,030.34</b>
<b>Total Fixed Assets</b>	<b>\$8,030.34</b>
Other Assets	
1230 Security Deposit (Ops)	2,094.40
1600 Investment	
1612 CUIT Magnus-Ops (Ending 2001)	989,256.33
<b>Total 1600 Investment</b>	<b>989,256.33</b>
1650 Investment - Scholarship Fund	
1622 CUIT Magnus-Licentiate (...2002)	1,277,941.45
1623 CUIT Magnus-Doctoral (...2003)	114,953.61
<b>Total 1650 Investment - Scholarship Fund</b>	<b>1,392,895.06</b>
1800 Finance Right of Use (net)	44,602.80
<b>Total Other Assets</b>	<b>\$2,428,848.59</b>
<b>TOTAL ASSETS</b>	<b>\$2,811,137.63</b>
<b>LIABILITIES AND EQUITY</b>	

	TOTAL
<b>Liabilities</b>	
Current Liabilities	
Accounts Payable	
Accounts Payable (A/P)	9,367.98
<b>Total Accounts Payable</b>	<b>\$9,367.98</b>
Credit Cards	
2160 Bank of America - 7812	-95,224.44
2161 BoA Credit Card K. Butler Visa -5317	69,236.48
2162 BofA Credit Card D. Miller Visa - 6414	26,007.95
<b>Total 2160 Bank of America - 7812</b>	<b>19.99</b>
<b>Total Credit Cards</b>	<b>\$19.99</b>
Other Current Liabilities	
2115 Accrued Scholarships Licentiate	59,498.02
2120 Accrued Expenses - Royalties	
2121 AccruedExp-Holy See CCEO (8%)	10.00
2123 Accrued Exp-Holy See Dignit(6%)	19.20
2126 QUQQU, Code - 4th Edition	1,026.20
<b>Total 2120 Accrued Expenses - Royalties</b>	<b>1,055.40</b>
2130 Accrued Payroll	
2131 Accrued Wages	8,392.41
<b>Total 2130 Accrued Payroll</b>	<b>8,392.41</b>
2135 Accrued Expenses	15,528.75
2136 Accrued Commentary Contributors	48,933.33
2150 Short Term Lease Liability	32,263.14
2200 Deferred Revenue	
2201 Deferred Revenue (Conv. Reg.)	25,315.00
2204 Deferred Rev - Membership Dues	310,800.00
<b>Total 2200 Deferred Revenue</b>	<b>336,115.00</b>
<b>Total Other Current Liabilities</b>	<b>\$501,786.05</b>
<b>Total Current Liabilities</b>	<b>\$511,174.02</b>
Long-Term Liabilities	
2700 Long Term Lease Liability	13,598.99
<b>Total Long-Term Liabilities</b>	<b>\$13,598.99</b>
<b>Total Liabilities</b>	<b>\$524,773.01</b>
Equity	
3101 Unrestricted	0.00
3102 Undesignated	775,720.80
3103 Board designated - Publications	-148,606.28
<b>Total 3101 Unrestricted</b>	<b>627,114.52</b>
3120 Temporarily restricted	1,274,896.17
3126 Unrestricted Retained Earn-Scho	174,874.12
Net Income	209,479.81
<b>Total Equity</b>	<b>\$2,286,364.62</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$2,811,137.63</b>

**Note**

FY2023 Investment Account Transfers to be Replenished:  
 General Investment Fund \$10,000  
 FY2024 Investment Account Transfers to be Replenished:

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General Investment Fund \$150,000

For Management Purposes Only

These financial statements are the property and responsibility of the management of Canon Law Society of America. These financial statements have not been audited or reviewed and accordingly no opinion or any other form of assurance is expressed on them.

# Canon Law Society of America

## Budget Overview: FY25

July 2024 - June 2025

	TOTAL
<b>Income</b>	
4100 Stewardship	
4110 Membership Dues	
4111 New Member Dues	20,000.00
4112 Annual Dues Renewal	350,000.00
<b>Total 4110 Membership Dues</b>	<b>370,000.00</b>
4130 Scholarship Contributions	
4131 Licentiate Scholarship	15,000.00
4132 Doctoral Scholarship	3,000.00
<b>Total 4130 Scholarship Contributions</b>	<b>18,000.00</b>
4140 Investment Income	
4141 Interest & Dividend-Operations	11,000.00
4142 Interest & Dividend-Licentiate	15,000.00
4143 Interest & Dividend - Doctoral	1,300.00
4144 Int & Div - Scholarship (TD Bank)	20.00
4160 Unreal. Gains/Loss - Gen Ops (001)	42,000.00
4161 Unreal Gains/Loss-Licentiate Sch (002)	45,000.00
4162 Unreal Gains/Loss-Doctoral Sch (003)	1,950.00
<b>Total 4140 Investment Income</b>	<b>116,270.00</b>
<b>Total 4100 Stewardship</b>	<b>504,270.00</b>
4300 Membership Development	
4310 Annual Convention-Members Mtg	
4311 Exhibitors/Sponsorships	2,500.00
4312 Banquet Fees (Additional)	800.00
4313 Convention Registration	150,000.00
4314 Pre-Convention Fees	23,500.00
4315 Convention Workbook Purchases	250.00
4316 One Day Registration	500.00
4318 Contract Commission	12,000.00
4350 Discounts/Refunds Given	-7,700.00
<b>Total 4310 Annual Convention-Members Mtg</b>	<b>181,850.00</b>
<b>Total 4300 Membership Development</b>	<b>181,850.00</b>
4400 Product Development	
4410 Publication and Resources	
4411 Publications Sales	24,000.00
4420 Publications - Amazon sales	6,000.00
4430 Publication shipping income	4,000.00
<b>Total 4410 Publication and Resources</b>	<b>34,000.00</b>
<b>Total 4400 Product Development</b>	<b>34,000.00</b>
<b>Total Income</b>	<b>\$720,120.00</b>
<b>GROSS PROFIT</b>	<b>\$720,120.00</b>
<b>Expenses</b>	
5100 Stewardship Expense	

	TOTAL
5120 Scholarships	
5121 Licentiate Scholarship Awards	49,000.00
<b>Total 5120 Scholarships</b>	<b>49,000.00</b>
<b>Total 5100 Stewardship Expense</b>	<b>49,000.00</b>
5200 Professional Developmnt	
5223 Networking	20,000.00
<b>Total 5200 Professional Developmnt</b>	<b>20,000.00</b>
5300 Convention and workshops (Membership Dev)	
5310 Membership Outreach	1,000.00
5313 Membership Expenses	15,000.00
<b>Total 5310 Membership Outreach</b>	<b>16,000.00</b>
5320 Annual Convention - Members Mtg	
5321 Convention Exhibit/Advertising	300.00
5322 Convention Hotel, Food Events	90,000.00
5323 Convention Audio Visual Contractor	37,000.00
5324 Convention Supplies	3,000.00
5325 Convention Travel	6,000.00
5327 Convention Postage/Shipping	1,500.00
5328 Convention Printing/Copying	1,500.00
5329 Promotion; Program Materials/Banner	5,000.00
5330 Liturgy & Environment	3,500.00
5331 Speaker Honoraria/ Stipends	14,000.00
5332 Speaker/Travel	4,000.00
5333 Convention Lodging/Meals	5,000.00
5334 Convention Planner	63,500.00
<b>Total 5320 Annual Convention - Members Mtg</b>	<b>234,300.00</b>
5340 Board of Governors	
5345 BOG Travel	10,400.00
5346 BOG Lodging/Meals	22,000.00
5347 Officers' Expenses	1,000.00
5348 President Discretionary Fund	2,000.00
<b>Total 5340 Board of Governors</b>	<b>35,400.00</b>
<b>Total 5300 Convention and workshops (Membership Dev)</b>	<b>285,700.00</b>
5350 Committees	
5351 Constitutional Committees	3,500.00
5352 Standing Committees	3,000.00
5353 Convention Planning Committee	10,000.00
5355 Strategic Visioning	5,000.00
5356 Publication Advisory Board Comm	12,000.00
<b>Total 5350 Committees</b>	<b>33,500.00</b>
5400 Product Dvelopment	
5420 Expenses-Publication & Resource	
5423 Books/Media/Materials	171,000.00
5424 Membership Dues/Subscription/Licensing	1,000.00
5426 Bank/Financial Services Fees	4,000.00
5427 Publications Postage/Shipping	1,000.00
5428 Supplies	500.00
<b>Total 5420 Expenses-Publication &amp; Resource</b>	<b>177,500.00</b>
5430 Logistech-Outsourcing Pub & Res	

	TOTAL
5434 Rent-Storage Space (Pallet/Quic	1,000.00
5435 Ordering Processing	3,000.00
5438 Prof Services (Projects/Warehouse Support)	100.00
5440 Postage/Shipping	10,000.00
<b>Total 5430 Logistech-Outsourcing Pub &amp; Res</b>	<b>14,100.00</b>
5450 Expenses-Royalties Pub & Resour	
5452 Royalties for CIC (8% of NR)	1,000.00
5453 Royalties for Dignitas Connubbii (6% of NR)	150.00
<b>Total 5450 Expenses-Royalties Pub &amp; Resour</b>	<b>1,150.00</b>
5460 Product Partnerships	
5461 CLSA Research Database Hosting	1,600.00
<b>Total 5460 Product Partnerships</b>	<b>1,600.00</b>
<b>Total 5400 Product Development</b>	<b>194,350.00</b>
6100 Canon Law Society Operating Exp	
6110 Salaries and Benefits	
6111 Salaries	220,000.00
6112 Employer Payroll Taxes	15,750.00
6113 Professional Development (Staff	1,000.00
6114 Employee Health Benefit Plan	25,000.00
6115 Pension Plan Administration	235.00
6116 403b Obligations	11,000.00
<b>Total 6110 Salaries and Benefits</b>	<b>272,985.00</b>
6120 Operating Expenses	
6121 Publication/Media Materials	1,000.00
6127 Rent	33,000.00
6130 Printing/Copying	2,000.00
6132 Professional Services (Contract	6,000.00
6134 Accounting/Audit Fees	65,000.00
6135 Legal Fees	5,000.00
<b>Total 6132 Professional Services (Contract</b>	<b>76,000.00</b>
6133 Bank/Financial Fees/PayrollFees	30,000.00
6138 CMS and Website Licensing	5,000.00
6145 Other Business Expenses	
6122 Software/Subscription/Licenses	3,000.00
6123 Advertising/Marketing/Graphic Design	100.00
6124 Awards/Gifts	1,000.00
6125 Equipment Lease/Purchase/Maint	2,000.00
6126 Business Insurance	1,200.00
6128 Telecommunications	5,500.00
6129 Postage/Shipping	1,500.00
6131 Supplies	4,000.00
6136 Executive Coordinator/Travel	1,500.00
6137 Lodging/Meals	1,000.00
6140 Depreciation Expense	4,500.00
<b>Total 6145 Other Business Expenses</b>	<b>25,300.00</b>
<b>Total 6120 Operating Expenses</b>	<b>172,300.00</b>
<b>Total 6100 Canon Law Society Operating Exp</b>	<b>445,285.00</b>
<b>Total Expenses</b>	<b>\$1,027,835.00</b>
<b>NET OPERATING INCOME</b>	<b>\$ -307,715.00</b>

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	TOTAL
NET INCOME	<b>\$ -307,715.00</b>

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# Canon Law Society of America

## Budget vs. Actuals: 2023-2024 - FY24

July 2023 - June 2024

	TOTAL	
	ACTUAL	BUDGET
Income		
4100 Stewardship		
4110 Membership Dues	0.00	
4111 New Member Dues	18,875.00	20,000.00
4112 Annual Dues Renewal	369,875.00	330,000.00
<b>Total 4110 Membership Dues</b>	<b>388,750.00</b>	<b>350,000.00</b>
4120 Donations		
4122 General Donations	215.00	
<b>Total 4120 Donations</b>	<b>215.00</b>	
4130 Scholarship Contributions	0.00	
4131 Licentiate Scholarship	13,026.60	15,000.00
4132 Doctoral Scholarship	4,808.85	3,000.00
<b>Total 4130 Scholarship Contributions</b>	<b>17,835.45</b>	<b>18,000.00</b>
4140 Investment Income		
4141 Interest & Dividend-Operations	18,922.09	11,000.00
4142 Interest & Dividend-Licentiate	24,123.35	15,000.00
4143 Interest & Dividend - Doctoral	2,169.94	1,300.00
4144 Int & Div - Scholarship (TD Bank)	3.10	
4150 Realized Gains/Loss	3,279.00	
4160 Unreal. Gains/Loss - Gen Ops (001)	97,089.67	42,000.00
4161 Unreal Gains/Loss-Licentiate Sch (002)	120,144.19	45,000.00
4162 Unreal Gains/Loss-Doctoral Sch (003)	10,829.18	1,950.00
<b>Total 4140 Investment Income</b>	<b>276,560.52</b>	<b>116,250.00</b>
<b>Total 4100 Stewardship</b>	<b>683,360.97</b>	<b>484,250.00</b>
4300 Membership Development		
4310 Annual Convention-Members Mtg	0.00	
4311 Exhibitors/Sponsorships	3,600.00	6,200.00
4312 Banquet Fees (Additional)	2,000.00	800.00
4313 Convention Registration	202,325.00	181,750.00
4314 Pre-Convention Fees	21,225.00	16,250.00
4315 Convention Workbook Purchases		7,500.00
4316 One Day Registration		125.00
4317 Sponsorship Donations	15,750.00	
4318 Contract Commission	12,923.26	12,000.00
<b>Total 4310 Annual Convention-Members Mtg</b>	<b>257,823.26</b>	<b>224,625.00</b>
<b>Total 4300 Membership Development</b>	<b>257,823.26</b>	<b>224,625.00</b>
4400 Product Development		
4410 Publication and Resources		
4411 Publications Sales	68,757.51	87,000.00
4413 Product Partnership Royalties	2,380.95	3,500.00
4417 Sales - Digital, Electronic Media		1,200.00
4420 Publications - Amazon sales	5,588.90	6,000.00

	TOTAL	
	ACTUAL	BUDGET
4430 Publication shipping income	8,573.61	
<b>Total 4410 Publication and Resources</b>	<b>85,300.97</b>	<b>97,700.00</b>
<b>Total 4400 Product Development</b>	<b>85,300.97</b>	<b>97,700.00</b>
<b>Total Income</b>	<b>\$1,026,485.20</b>	<b>\$806,575.00</b>
GROSS PROFIT	<b>\$1,026,485.20</b>	<b>\$806,575.00</b>
Expenses		
5100 Stewardship Expense		
5120 Scholarships		
5121 Licentiate Scholarship Awards	35,000.00	26,500.00
5123 Other Scholarship Expenses	100.00	4,000.00
<b>Total 5120 Scholarships</b>	<b>35,100.00</b>	<b>30,500.00</b>
<b>Total 5100 Stewardship Expense</b>	<b>35,100.00</b>	<b>30,500.00</b>
5200 Professional Developmnt		
5223 Networking	11,849.46	13,500.00
<b>Total 5200 Professional Developmnt</b>	<b>11,849.46</b>	<b>13,500.00</b>
5300 Convention and workshops (Membership Dev)		
5310 Membership Outreach	1,332.55	3,000.00
5311 Outreach Projects	8,595.09	
<b>Total 5310 Membership Outreach</b>	<b>9,927.64</b>	<b>3,000.00</b>
5320 Annual Convention - Members Mtg		
5321 Convention Exhibit/Advertising		200.00
5322 Convention Hotel, Food Events	90,890.23	95,000.00
5323 Convention Audio Visual Contractor	37,284.21	45,000.00
5324 Convention Supplies	5,983.75	3,000.00
5325 Convention Travel	7,254.36	6,000.00
5326 Convention Telecommunications	683.89	
5327 Convention Postage/Shipping	2,176.26	1,500.00
5328 Convention Printing/Copying	3,449.28	6,500.00
5329 Promotion; Program Materials/Banner	5,650.54	5,500.00
5330 Liturgy & Environment	5,679.00	3,500.00
5331 Speaker Honoraria/ Stipends	18,300.00	19,000.00
5332 Speaker/Travel	6,468.01	5,000.00
5333 Convention Lodging/Meals	3,813.69	10,000.00
5334 Convention Planner	51,026.23	57,000.00
<b>Total 5320 Annual Convention - Members Mtg</b>	<b>238,659.45</b>	<b>257,200.00</b>
5340 Board of Governors	87.06	
5341 BOG Telecommunications	664.20	
5344 BOG Supplies	33.27	
5345 BOG Travel	10,103.57	10,400.00
5346 BOG Lodging/Meals	31,676.16	26,000.00
5347 Officers' Expenses	0.00	3,000.00
5348 President Discretionary Fund	349.90	2,000.00
<b>Total 5340 Board of Governors</b>	<b>42,914.16</b>	<b>41,400.00</b>
<b>Total 5300 Convention and workshops (Membership Dev)</b>	<b>291,501.25</b>	<b>301,600.00</b>
5350 Committees		
5351 Constitutional Committees	3,377.17	3,000.00
5352 Standing Committees		6,500.00
5353 Convention Planning Committee	1,759.34	6,500.00

	TOTAL	
	ACTUAL	BUDGET
5355 Strategic Visioning	21,920.08	30,000.00
5356 Publication Advisory Board Comm	5,482.75	17,000.00
<b>Total 5350 Committees</b>	<b>32,539.34</b>	<b>63,000.00</b>
5400 Product Dvelopment		
5410 COGS - Publication & Resources		
5411 Cost of Goods Sold	13,421.94	27,300.00
<b>Total 5410 COGS - Publication &amp; Resources</b>	<b>13,421.94</b>	<b>27,300.00</b>
5420 Expenses-Publication & Resource		
5423 Books/Media/Materials	2,373.22	140,000.00
5424 Membership Dues/Subscription/Licensing		1,000.00
5425 Advertising/Public Relations	200.00	
5427 Publications Postage/Shipping	571.23	1,000.00
5428 Supplies		500.00
7500 Obsolete Inventory	1,675.69	
<b>Total 5420 Expenses-Publication &amp; Resource</b>	<b>4,820.14</b>	<b>142,500.00</b>
5430 Logistech-Outsourcing Pub & Res	2.98	
5433 Project Management Fees		200.00
5434 Rent-Storage Space (Pallet/Quic	873.26	1,000.00
5435 Ordering Processing	2,187.50	4,000.00
5436 Website, IT Services		5,000.00
5437 Printing/Copying Reports		2,000.00
5438 Prof Services (Projects/Warehouse Support)	25.72	300.00
5440 Postage/Shipping	7,921.53	13,000.00
<b>Total 5430 Logistech-Outsourcing Pub &amp; Res</b>	<b>11,010.99</b>	<b>25,500.00</b>
5450 Expenses-Royalties Pub & Resour		
5451 Royalties for CCEO (8% of NR)	90.00	150.00
5452 Royalties for CIC (8% of NR)	0.00	2,700.00
5453 Royalties for Dignitas Connubbii (6% of NR)	66.00	150.00
5454 Royalties for Selected Issues (60% of NR)	41.04	
5456 QUQQEI, Code - 4th Edition	2,403.60	
<b>Total 5450 Expenses-Royalties Pub &amp; Resour</b>	<b>2,600.64</b>	<b>3,000.00</b>
5460 Product Partnerships		
5461 CLSA Research Database Hosting	1,565.03	1,600.00
<b>Total 5460 Product Partnerships</b>	<b>1,565.03</b>	<b>1,600.00</b>
<b>Total 5400 Product Dvelopment</b>	<b>33,418.74</b>	<b>199,900.00</b>
6100 Canon Law Society Operating Exp		
6110 Salaries and Benefits		
6111 Salaries	205,643.16	200,000.00
6112 Employer Payroll Taxes	15,465.61	14,780.00
6113 Professional Development (Staff	365.00	1,000.00
6114 Employee Health Benefit Plan	23,624.58	26,000.00
6115 Pension Plan Administration	235.50	220.00
6116 403b Obligations	8,703.44	6,000.00
<b>Total 6110 Salaries and Benefits</b>	<b>254,037.29</b>	<b>248,000.00</b>
6120 Operating Expenses		
6121 Publication/Media Materials		15,000.00
6127 Rent	-2,585.73	32,000.00
6132 Professional Services (Contract	3,400.00	10,000.00

	TOTAL	
	ACTUAL	BUDGET
6134 Accounting/Audit Fees	77,176.68	65,000.00
6135 Legal Fees		15,000.00
<b>Total 6132 Professional Services (Contract</b>	<b>80,576.68</b>	<b>90,000.00</b>
6133 Bank/Financial Fees/PayrollFees	24,658.62	25,000.00
6138 CMS and Website Licensing	4,599.80	
6144 Operating Lease Expense	32,525.52	
6145 Other Business Expenses		
6122 Software/Subscription/Licenses	4,204.30	3,000.00
6123 Advertising/Marketing/Graphic Design		100.00
6124 Awards/Gifts	312.59	1,000.00
6125 Equipment Lease/Purchase/Maint	659.99	2,000.00
6126 Business Insurance	1,389.95	1,200.00
6128 Telecommunications	5,035.83	6,000.00
6129 Postage/Shipping	1,059.92	1,500.00
6131 Supplies	843.83	4,000.00
6136 Executive Coordinator/Travel	299.13	2,000.00
6137 Lodging/Meals	155.00	1,000.00
6140 Depreciation Expense	4,553.88	4,000.00
<b>Total 6145 Other Business Expenses</b>	<b>18,514.42</b>	<b>25,800.00</b>
6150 Miscellaneous Expenses	270.00	
<b>Total 6120 Operating Expenses</b>	<b>158,559.31</b>	<b>187,800.00</b>
<b>Total 6100 Canon Law Society Operating Exp</b>	<b>412,596.60</b>	<b>435,800.00</b>
<b>Total Expenses</b>	<b>\$817,005.39</b>	<b>\$1,044,300.00</b>
NET OPERATING INCOME	<b>\$209,479.81</b>	<b>\$ -237,725.00</b>
NET INCOME	<b>\$209,479.81</b>	<b>\$ -237,725.00</b>

# Canon Law Society of America

## Profit and Loss by Class FY24

July 2023 - June 2024

	CONVENTIONS AND WORKSHOPS	GENERAL AND ADMINISTRATIVE	MEMBER SERVICES	PUBLICATIONS	SCHOLARSHIP FUND	TOTAL
<b>Income</b>						
4100 Stewardship						\$0.00
4110 Membership Dues			0.00			\$0.00
4111 New Member Dues			18,875.00			\$18,875.00
4112 Annual Dues Renewal			369,875.00			\$369,875.00
<b>Total 4110 Membership Dues</b>			<b>388,750.00</b>			<b>\$388,750.00</b>
4120 Donations						\$0.00
4122 General Donations		215.00				\$215.00
<b>Total 4120 Donations</b>		<b>215.00</b>				<b>\$215.00</b>
4130 Scholarship Contributions					0.00	\$0.00
4131 Licentiate Scholarship					13,026.60	\$13,026.60
4132 Doctoral Scholarship					4,808.85	\$4,808.85
<b>Total 4130 Scholarship Contributions</b>					<b>17,835.45</b>	<b>\$17,835.45</b>
4140 Investment Income						\$0.00
4141 Interest & Dividend-Operations		18,922.09				\$18,922.09
4142 Interest & Dividend-Licentiate					24,123.35	\$24,123.35
4143 Interest & Dividend - Doctoral					2,169.94	\$2,169.94
4144 Int & Div - Scholarship (TD Bank)		1.55			1.55	\$3.10
4150 Realized Gains/Loss		3,279.00				\$3,279.00
4160 Unreal. Gains/Loss - Gen Ops (001)		97,089.67				\$97,089.67
4161 Unreal Gains/Loss-Licentiate Sch (002)					120,144.19	\$120,144.19
4162 Unreal Gains/Loss-Doctoral Sch (003)					10,829.18	\$10,829.18
<b>Total 4140 Investment Income</b>		<b>119,292.31</b>			<b>157,268.21</b>	<b>\$276,560.52</b>
<b>Total 4100 Stewardship</b>		<b>119,507.31</b>	<b>388,750.00</b>		<b>175,103.66</b>	<b>\$683,360.97</b>
4300 Membership Development						\$0.00
4310 Annual Convention-Members Mtg	0.00					\$0.00
4311 Exhibitors/Sponsorships	3,600.00					\$3,600.00
4312 Banquet Fees (Additional)	2,000.00					\$2,000.00
4313 Convention Registration	202,325.00					\$202,325.00
4314 Pre-Convention Fees	21,225.00					\$21,225.00
4317 Sponsorship Donations	15,750.00					\$15,750.00
4318 Contract Commission	12,923.26					\$12,923.26
<b>Total 4310 Annual Convention-Members Mtg</b>	<b>257,823.26</b>					<b>\$257,823.26</b>
<b>Total 4300 Membership Development</b>	<b>257,823.26</b>					<b>\$257,823.26</b>
4400 Product Development						\$0.00
4410 Publication and Resources						\$0.00
4411 Publications Sales			1,355.00	67,402.51		\$68,757.51
4413 Product Partnership Royalties				2,380.95		\$2,380.95
4420 Publications - Amazon sales				5,588.90		\$5,588.90
4430 Publication shipping income			-10.97	8,584.58		\$8,573.61
<b>Total 4410 Publication and Resources</b>			<b>1,344.03</b>	<b>83,956.94</b>		<b>\$85,300.97</b>
<b>Total 4400 Product Development</b>			<b>1,344.03</b>	<b>83,956.94</b>		<b>\$85,300.97</b>
<b>Total Income</b>	<b>\$257,823.26</b>	<b>\$119,507.31</b>	<b>\$390,094.03</b>	<b>\$83,956.94</b>	<b>\$175,103.66</b>	<b>\$1,026,485.20</b>
<b>GROSS PROFIT</b>	<b>\$257,823.26</b>	<b>\$119,507.31</b>	<b>\$390,094.03</b>	<b>\$83,956.94</b>	<b>\$175,103.66</b>	<b>\$1,026,485.20</b>
<b>Expenses</b>						
5100 Stewardship Expense						\$0.00
5120 Scholarships						\$0.00
5121 Licentiate Scholarship Awards					35,000.00	\$35,000.00
5123 Other Scholarship Expenses					100.00	\$100.00
<b>Total 5120 Scholarships</b>					<b>35,100.00</b>	<b>\$35,100.00</b>
<b>Total 5100 Stewardship Expense</b>					<b>35,100.00</b>	<b>\$35,100.00</b>
5200 Professional Developmnt						\$0.00
5223 Networking	284.13	11,565.33				\$11,849.46
<b>Total 5200 Professional Developmnt</b>	<b>284.13</b>	<b>11,565.33</b>				<b>\$11,849.46</b>
5300 Convention and workshops (Membership Dev)						\$0.00

	CONVENTIONS AND WORKSHOPS	GENERAL AND ADMINISTRATIVE	MEMBER SERVICES	PUBLICATIONS	SCHOLARSHIP FUND	TOTAL
5310 Membership Outreach	-726.14	578.40	1,480.29			\$1,332.55
5311 Outreach Projects			8,595.09	0.00		\$8,595.09
<b>Total 5310 Membership Outreach</b>	<b>-726.14</b>	<b>578.40</b>	<b>10,075.38</b>	<b>0.00</b>		<b>\$9,927.64</b>
5320 Annual Convention - Members Mtg						\$0.00
5322 Convention Hotel, Food Events	90,890.23					\$90,890.23
5323 Convention Audio Visual Contractor	37,284.21					\$37,284.21
5324 Convention Supplies	5,983.75					\$5,983.75
5325 Convention Travel	7,254.36					\$7,254.36
5326 Convention Telecommunications	683.89					\$683.89
5327 Convention Postage/Shipping	2,029.41			146.85		\$2,176.26
5328 Convention Printing/Copying	3,449.28					\$3,449.28
5329 Promotion; Program Materials/Banner	2,142.54			3,508.00		\$5,650.54
5330 Liturgy & Environment	5,679.00					\$5,679.00
5331 Speaker Honoraria/ Stipends	18,300.00					\$18,300.00
5332 Speaker/Travel	6,468.01					\$6,468.01
5333 Convention Lodging/Meals	3,813.69					\$3,813.69
5334 Convention Planner	51,026.23					\$51,026.23
<b>Total 5320 Annual Convention - Members Mtg</b>	<b>235,004.60</b>			<b>3,654.85</b>		<b>\$238,659.45</b>
5340 Board of Governors		87.06				\$87.06
5341 BOG Telecommunications		664.20				\$664.20
5344 BOG Supplies		33.27				\$33.27
5345 BOG Travel		10,103.57				\$10,103.57
5346 BOG Lodging/Meals	16,207.40	15,468.76				\$31,676.16
5348 President Discretionary Fund			349.90			\$349.90
<b>Total 5340 Board of Governors</b>	<b>16,207.40</b>	<b>26,356.86</b>	<b>349.90</b>			<b>\$42,914.16</b>
<b>Total 5300 Convention and workshops (Membership Dev)</b>	<b>250,485.86</b>	<b>26,935.26</b>	<b>10,425.28</b>	<b>3,654.85</b>		<b>\$291,501.25</b>
5350 Committees						\$0.00
5351 Constitutional Committees	2,245.24	385.46	746.47			\$3,377.17
5353 Convention Planning Committee	1,759.34					\$1,759.34
5355 Strategic Visioning	17,934.65	3,985.43				\$21,920.08
5356 Publication Advisory Board Comm	361.42	976.99		4,144.34		\$5,482.75
<b>Total 5350 Committees</b>	<b>22,300.65</b>	<b>5,347.88</b>	<b>746.47</b>	<b>4,144.34</b>		<b>\$32,539.34</b>
5400 Product Dvelopment						\$0.00
5410 COGS - Publication & Resources						\$0.00
5411 Cost of Goods Sold				13,421.94		\$13,421.94
<b>Total 5410 COGS - Publication &amp; Resources</b>				<b>13,421.94</b>		<b>\$13,421.94</b>
5420 Expenses-Publication & Resource						\$0.00
5423 Books/Media/Materials		14.99		2,358.23		\$2,373.22
5425 Advertising/Public Relations				200.00		\$200.00
5427 Publications Postage/Shipping	200.00			371.23		\$571.23
7500 Obsolete Inventory				1,675.69		\$1,675.69
<b>Total 5420 Expenses-Publication &amp; Resource</b>	<b>200.00</b>	<b>14.99</b>		<b>4,605.15</b>		<b>\$4,820.14</b>
5430 Logistech-Outsourcing Pub & Res				2.98		\$2.98
5434 Rent-Storage Space (Pallet/Quic				873.26		\$873.26
5435 Ordering Processing				2,187.50		\$2,187.50
5438 Prof Services (Projects/Warehouse Support)				25.72		\$25.72
5440 Postage/Shipping				7,921.53		\$7,921.53
<b>Total 5430 Logistech-Outsourcing Pub &amp; Res</b>				<b>11,010.99</b>		<b>\$11,010.99</b>
5450 Expenses-Royalties Pub & Resour						\$0.00
5451 Royalties for CCEO (8% of NR)				90.00		\$90.00
5453 Royalties for Dignitas Connubbii (6% of NR)				66.00		\$66.00
5454 Royalties for Selected Issues (60% of NR)				41.04		\$41.04
5456 QUQQEI, Code - 4th Edition				2,403.60		\$2,403.60
<b>Total 5450 Expenses-Royalties Pub &amp; Resour</b>				<b>2,600.64</b>		<b>\$2,600.64</b>
5460 Product Partnerships						\$0.00
5461 CLSA Research Database Hosting				1,565.03		\$1,565.03
<b>Total 5460 Product Partnerships</b>				<b>1,565.03</b>		<b>\$1,565.03</b>
<b>Total 5400 Product Dvelopment</b>	<b>200.00</b>	<b>14.99</b>		<b>33,203.75</b>		<b>\$33,418.74</b>

	CONVENTIONS AND WORKSHOPS	GENERAL AND ADMINISTRATIVE	MEMBER SERVICES	PUBLICATIONS	SCHOLARSHIP FUND	TOTAL
6100 Canon Law Society Operating Exp						\$0.00
6110 Salaries and Benefits						\$0.00
6111 Salaries	34,502.10	87,899.82	19,263.32	61,521.55	2,456.37	\$205,643.16
6112 Employer Payroll Taxes	2,596.73	6,585.35	1,452.79	4,645.40	185.34	\$15,465.61
6113 Professional Development (Staff		365.00				\$365.00
6114 Employee Health Benefit Plan	3,788.81	11,120.44	2,046.77	6,396.06	272.50	\$23,624.58
6115 Pension Plan Administration		235.50				\$235.50
6116 403b Obligations	1,226.69	3,757.81	752.77	2,816.56	149.61	\$8,703.44
<b>Total 6110 Salaries and Benefits</b>	<b>42,114.33</b>	<b>109,963.92</b>	<b>23,515.65</b>	<b>75,379.57</b>	<b>3,063.82</b>	<b>\$254,037.29</b>
6120 Operating Expenses						\$0.00
6127 Rent		-2,585.73				\$ -2,585.73
6132 Professional Services (Contract	500.00	2,900.00				\$3,400.00
6134 Accounting/Audit Fees		77,176.68				\$77,176.68
<b>Total 6132 Professional Services (Contract</b>	<b>500.00</b>	<b>80,076.68</b>				<b>\$80,576.68</b>
6133 Bank/Financial Fees/PayrollFees		24,658.62				\$24,658.62
6138 CMS and Website Licensing			4,599.80			\$4,599.80
6144 Operating Lease Expense		32,525.52				\$32,525.52
6145 Other Business Expenses						\$0.00
6122 Software/Subscription/Licenses		4,204.30				\$4,204.30
6124 Awards/Gifts		312.59				\$312.59
6125 Equipment Lease/Purchase/Maint		659.99				\$659.99
6126 Business Insurance		1,389.95				\$1,389.95
6128 Telecommunications		5,035.83				\$5,035.83
6129 Postage/Shipping		1,059.92				\$1,059.92
6131 Supplies		714.28		129.55		\$843.83
6136 Executive Coordinator/Travel		299.13				\$299.13
6137 Lodging/Meals		155.00				\$155.00
6140 Depreciation Expense		4,553.88				\$4,553.88
<b>Total 6145 Other Business Expenses</b>		<b>18,384.87</b>		<b>129.55</b>		<b>\$18,514.42</b>
6150 Miscellaneous Expenses		270.00				\$270.00
<b>Total 6120 Operating Expenses</b>	<b>500.00</b>	<b>153,329.96</b>	<b>4,599.80</b>	<b>129.55</b>		<b>\$158,559.31</b>
<b>Total 6100 Canon Law Society Operating Exp</b>	<b>42,614.33</b>	<b>263,293.88</b>	<b>28,115.45</b>	<b>75,509.12</b>	<b>3,063.82</b>	<b>\$412,596.60</b>
<b>Total Expenses</b>	<b>\$315,884.97</b>	<b>\$307,157.34</b>	<b>\$39,287.20</b>	<b>\$116,512.06</b>	<b>\$38,163.82</b>	<b>\$817,005.39</b>
NET OPERATING INCOME	\$ -58,061.71	\$ -187,650.03	\$350,806.83	\$ -32,555.12	\$136,939.84	\$209,479.81
NET INCOME	\$ -58,061.71	\$ -187,650.03	\$350,806.83	\$ -32,555.12	\$136,939.84	\$209,479.81

**Note**

FY2023 Investment Account Transfers to be Replenished:  
General Investment Fund \$10,000  
FY2024 Investment Account Transfers to be Replenished:  
General Investment Fund \$150,000

Unaudited: For Management Purposes Only

These financial statements are the property and responsibility of the management of Canon Law Society of America. These financial statements have not been audited or reviewed and accordingly no opinion or any other form of assurance is expressed on them.

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**CANON LAW SOCIETY OF  
AMERICA**

**Financial Statements and  
Independent Accountant's  
Review Report**

**For the Year Ended  
June 30, 2024**

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**LSWG**

**CERTIFIED PUBLIC ACCOUNTANTS  
& BUSINESS ADVISORS**



## INDEPENDENT ACCOUNTANT’S REVIEW REPORT

To the Board of Governors of  
Canon Law Society of America  
Washington, D.C.

We have reviewed the accompanying financial statements of Canon Law Society of America (a nonprofit organization), which comprise the statement of financial position as of June 30, 2024, and the related statements of activities and changes in net assets, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements. A review includes primarily applying analytical procedures to management’s financial data and making inquiries of entity management. A review is substantially less in scope than an audit, the objective of which is the expression of an opinion regarding the financial statements as a whole. Accordingly, we do not express such an opinion.

### **Management’s Responsibility for the Financial Statements**

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement whether due to fraud or error.

### **Accountant’s Responsibility**

Our responsibility is to conduct the review engagement in accordance with Statements on Standards for Accounting and Review Services promulgated by the Accounting and Review Services Committee of the AICPA. Those standards require us to perform procedures to obtain limited assurance as a basis for reporting whether we are aware of any material modifications that should be made to the financial statements for them to be in accordance with accounting principles generally accepted in the United States of America. We believe that the results of our procedures provide a reasonable basis for our conclusion.

We are required to be independent of Canon Law Society of America and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements related to our review.

### **Accountant’s Conclusion**

Based on our review, we are not aware of any material modifications that should be made to the accompanying financial statements in order for them to be in accordance with accounting principles generally accepted in the United States of America.

*LSWG, P.A.*

Rockville, Maryland  
September 11, 2024

**CANON LAW SOCIETY OF AMERICA**  
**Statement of Financial Position**  
**June 30, 2024**

**Assets**

**Current Assets**

Cash and cash equivalents	\$	212,432
Accounts receivable		4,744
Inventory		90,098
Prepaid expenses		66,985
Total Current Assets		374,259

**Furniture and Equipment - at cost**

Furniture and equipment		39,773
Less: accumulated depreciation		(31,743)
Furniture and Equipment, Net		8,030

**Other Assets**

Security deposit		2,094
Investments		989,256
Investments - scholarship funds		1,392,895
Right of use operating lease assets		44,603
Total Other Assets		2,428,848

<b>Total Assets</b>	<b>\$</b>	<b>2,811,137</b>
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**Liabilities and Net Assets**

**Current Liabilities**

Accounts payable and accrued expenses	\$	134,403
Accrued vacation		8,392
Deferred revenue		336,115
Operating lease liability - current portion		32,263
Total Current Liabilities		511,173

**Long-Term Liabilities**

Operating lease liability - net of current portion		13,599
Total Long-Term Liabilities		13,599

<b>Total Liabilities</b>		<b>524,772</b>
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**Net Assets**

Without donor restrictions		
Undesignated		1,160,075
Board designated - publications		(148,606)
Total Unrestricted		1,011,469
With donor restrictions		1,274,896
Total Net Assets		2,286,365

<b>Total Liabilities and Net Assets</b>	<b>\$</b>	<b>2,811,137</b>
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The accompanying notes are an integral part of this statement.

**CANON LAW SOCIETY OF AMERICA**  
**Statement of Activities and Changes in Net Assets**  
**For the Year Ended June 30, 2024**

	Without Donor Restriction			With Donor Restrictions	Total
	<u>Undesignated</u>	<u>Publications</u>	<u>Total</u>		
<b>Revenue</b>					
Membership dues	\$ 388,750	\$ -	\$ 388,750	\$ -	\$ 388,750
Convention revenue	257,823	-	257,823	-	257,823
Sale of publications	-	82,921	82,921	-	82,921
Contributions	212	-	212	17,836	18,048
Interest and dividends	18,922	-	18,922	26,296	45,218
Royalties	-	2,381	2,381	-	2,381
Unrealized and realized gains on investments	100,369	-	100,369	130,973	231,342
Net assets released from restrictions	38,164	-	38,164	(38,164)	-
Total Revenue	804,240	85,302	889,542	136,941	1,026,483
<b>Expenses</b>					
<b>Program Services</b>					
Publications	-	116,511	116,511	-	116,511
Convention and workshops	315,885	-	315,885	-	315,885
Membership outreach	39,287	-	39,287	-	39,287
Scholarship fund	38,164	-	38,164	-	38,164
Total Program Services	393,336	116,511	509,847	-	509,847
<b>Supporting Services</b>	307,158	-	307,158	-	307,158
Total Expenses	700,494	116,511	817,005	-	817,005
<b>Changes in Net Assets</b>	103,746	(31,209)	72,537	136,941	209,478
<b>Net Assets - Beginning of Year</b>	1,056,329	(117,397)	938,932	1,137,955	2,076,887
<b>Net Assets - End of Year</b>	\$ 1,160,075	\$ (148,606)	\$ 1,011,469	\$ 1,274,896	\$ 2,286,365

The accompanying notes are an integral part of this statement.

**CANON LAW SOCIETY OF AMERICA**  
**Statement of Functional Expenses**  
**For the Year Ended June 30, 2024**

	Program				Supporting	
	Publications	Convention	Member Services	Scholarship Fund	General and Administrative	Total
Administrative office	\$ 75,380	\$ 42,114	\$ 23,516	\$ 3,064	\$ 109,964	\$ 254,038
Salaries and benefits	-	-	-	-	32,526	32,526
Operating lease expense	-	500	-	-	80,077	80,577
Professional fees	130	-	-	-	2,275	2,405
Other	-	-	-	-	24,659	24,659
Bank, financial and payroll fees	-	-	-	-	5,036	5,036
Telecommunications	-	-	4,600	-	4,204	8,804
Website and information technology	-	-	-	-	4,554	4,554
Depreciation and amortization	-	-	-	-	-	238,660
Convention	3,655	235,005	-	-	-	42,914
Board of Governors	-	16,207	350	-	26,357	9,927
Membership outreach	-	(726)	10,075	-	578	11,009
Outsourced publications and resources	11,009	-	-	-	-	13,422
Cost of publications sold	13,422	-	-	-	-	4,820
Publication and resource	4,605	200	-	-	15	2,601
Royalty expense	2,601	-	-	-	-	35,100
Scholarships	-	-	-	35,100	-	32,539
Committees	4,144	22,301	746	-	5,348	1,565
Product partnerships	1,565	-	-	-	-	11,849
Professional development	-	284	-	-	11,565	-
	<u>\$ 116,511</u>	<u>\$ 315,885</u>	<u>\$ 39,287</u>	<u>\$ 38,164</u>	<u>\$ 307,158</u>	<u>\$ 817,005</u>

The accompanying notes are an integral part of this statement.

**CANON LAW SOCIETY OF AMERICA**  
**Statement of Cash Flows**  
**For the Year Ended June 30, 2024**

**Increase (Decrease) in Cash and Cash Equivalents**

**Cash Flows From Operating Activities**

Changes in net assets	\$	209,478
Adjustments to reconcile changes in net assets to net cash provided by (used in) operating activities:		
Depreciation and amortization		4,554
Amortization of right of use operating lease assets		32,526
Realized and unrealized gains on investments		(231,342)
Change in assets and liabilities:		
Accounts receivable		(1,391)
Inventory		(16,562)
Prepaid expenses		(6,830)
Accounts payable and accrued expenses		27,583
Accrued vacation		3,478
Deferred revenue		(2,297)
Operating lease liability		(32,354)
Net Cash Provided by (Used in) Operating Activities		(13,157)

**Cash Flows From Investing Activities**

Purchases of investments		(235,400)
Proceeds from sale of investments		150,000
Purchases of furniture and equipment		(2,701)
Net Cash Provided by (Used in) Investing Activities		(88,101)

**Increase (Decrease) in Cash and Cash Equivalents** (101,258)

**Cash Balance - Beginning of Year** 313,690

**Cash Balance - End of Year** \$ 212,432

**Supplemental Disclosures:**

Income taxes paid	\$	-
Interest paid	\$	-

The accompanying notes are an integral part of this statement.

**Canon Law Society of America**  
**Notes to Financial Statements**  
**For the Year Ended June 30, 2024**

**1. Nature of Activities**

The Canon Law Society of America (CLSA) is a national, not-for-profit corporation, established in November 1939 in Washington DC to promote canonical and pastoral approaches to significant issues within the Roman Catholic Church. In addition to a publication service, CLSA conducts an annual convention and other symposia to promote a better understanding of church law and its pastoral applications. Major sources of revenue include: membership dues, sales of publications and annual convention and workshops.

**2. Summary of Significant Accounting Policies**

The accompanying financial statements are presented on the accrual basis of accounting, whereby revenue is recognized when earned and expenses when they are incurred.

**Cash and Cash Equivalents** – For purposes of the statement of cash flows, CLSA considers all cash accounts and all highly liquid debt instruments purchased with an initial maturity of three months or less to be cash and cash equivalents.

**Investments** - Investments in marketable securities with readily determinable fair values are reported at their fair values in the statement of financial position. Investment income or loss (including gains and losses on investments, interest and dividends) is included in the statement of activities and changes in net assets as an increase or decrease in net assets without donor restrictions unless the income or loss is restricted by donor or law. Investments consist principally of two mutual funds. Fair value of investments in securities is based on the latest reported sales price at June 30, 2024.

**Accounts Receivable** - Accounts receivable are stated at the amount management expects to collect from outstanding balances. CLSA provides an allowance for expected credit losses based on historical information, current evaluations of specific accounts, current market conditions and estimated default risks. There was no allowance for expected credit losses at June 30, 2024.

**Inventory** – The inventory of books and publications is stated at the lower of cost or market determined by the first-in, first-out method.

**Furniture and Equipment** - Purchases of furniture and equipment are recorded at cost. CLSA's policy is to capitalize expenditures for equipment purchased in the amount of \$1,000 or more. Depreciation is calculated over an estimated useful life of five years using the straight-line method. Leasehold improvements are recorded at cost and have an estimated useful life of ten years using the straight line method. Depreciation and amortization expense for the year ended June 30, 2024 was \$4,554.

**Canon Law Society of America**  
**Notes to Financial Statements**  
**For the Year Ended June 30, 2024**

**2. Summary of Significant Accounting Policies (continued)**

**Net Assets** - CLSA adopted Financial Accounting Standards Board (FASB) Codification Standards. Under the Codification Standards, the Organization is required to report information regarding its financial position and activities according to two classes of net assets:

Net Assets Without Donor Restrictions – Net assets that are not subject to or are no longer subject to donor-imposed stipulations.

Net Assets with Donor Restrictions – Net assets whose use is limited by donor-imposed time and/or purpose restrictions.

Revenues are reported as increases in net assets without donor restrictions unless use of the related assets is limited by donor-imposed restrictions. Expenses are reported as decreases in net assets without donor restriction. Gains and losses on investments and other asset or liabilities are reported as increases or decreases in net assets without donor restrictions unless their use is restricted by explicit donor stipulation or by law. Expirations of donor restrictions on the net assets (i.e. the donor-stipulated purpose has been fulfilled and/or the stipulated time period has elapsed) are reported as reclassifications between the applicable classes of net assets.

**Tax Status** - CLSA is exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code. CLSA has not been classified by the Internal Revenue Service as a private foundation. Income which is not related to the exempt purpose, less applicable deductions, is subject to Federal and state corporate income tax. CLSA is covered under a group religious exemption and is not required to file the IRS Form 990.

**Estimates** - In preparing financial statements in conformity with U.S. generally accepted accounting principles, management is required to make estimates and assumptions that affect the reported amounts of assets and liabilities, the disclosure of contingent assets and liabilities at the date of the financial statements, and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

**Financial Instruments** – CLSA’s financial instruments consist of investments, accounts receivable, accounts payable and accrued expenses. It is management’s opinion the CLSA is not exposed to significant interest rate or credit risk arising from these instruments. Unless otherwise noted, the fair values of these financial instruments are market values of these financial instruments, and approximate their carrying values.

**Canon Law Society of America  
Notes to Financial Statements  
For the Year Ended June 30, 2024**

**2. Summary of Significant Accounting Policies (continued)**

**Revenue Recognition** – Revenues from membership dues, which are non-refundable, are recognized pro-rata (on a straight-line basis) over the membership period, which corresponds with CLSA’s fiscal year-end. Convention and workshop registration fees are recognized as revenue without donor restrictions at the point in time the meeting or program is held. Publication revenues are recorded at the point in time the revenue is collected. Total revenue satisfied at a point in time for the year ended June 30, 2024 was \$340,744. Total revenue satisfied over time for the year ended June 30, 2024 was \$388,750.

Membership dues, convention and workshop revenues received in advance are deferred and recognized as revenue in the subsequent year.

CLSA recognizes contributions as revenue when cash, securities or other assets, an unconditional promise to give or a notification of a beneficial interest is received. Conditional promises to give – that is, those with a measurable performance of other barrier and a right of return – are not recognized until the conditions on which they depend have been met.

**Lease Accounting** - CLSA previously adopted Topic 842, Leases, which requires lessees to recognize a right-of-use (ROU) asset and lease liability on the statement of financial position for all leases with a term longer than 12 months. Leases are classified as finance or operating leases. CLSA has elected to not apply Topic 842 to low value assets. CLSA has also elected to separate lease and non-lease component in determining the ROU asset and lease liability; therefore, charges for common area maintenance (CAM) have not been with the ROU asset and lease liability on the statement of financial position. CLSA has applied the practical expedient which allows the use of the risk-free rate to determine the present value of the lease liability.

**Adoption of New Accounting Guidance** – In June 2016, the FASB issued guidance (FASB ASC 326) which significantly changed how entities will measure credit losses for most financial assets and certain other instruments that are not measured at fair value through changes in net assets. The most significant change in this standard is a shift from the incurred loss model to the expected loss model. Under the standard, disclosures are required to provide users of the financial statements with useful information in analyzing an Organization’s exposure to credit risk and the measurement of credit losses. Financial assets held by CLSA that are subject to the guidance in FASB ASC 326 were accounts receivable. CLSA adopted the standard effective July 1, 2023. The impact of the adoption was not considered material to the financial statements and primarily resulted in new/enhanced disclosures only.

**3. Functional Allocation of Expenses**

Directly identifiable expenses are charged to programs and supporting services. Salaries and benefits have been allocated among the programs and supporting services benefited based on estimated time and effort.

**Canon Law Society of America  
Notes to Financial Statements  
For the Year Ended June 30, 2024**

**4. Fair Value Measurement and Investments**

FASB Codification Standards defines fair value, establishes a framework for measuring fair value, and expands disclosures about fair value measurements and establishes a hierarchy for valuation inputs.

Fair value is the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants at the measurement date. A fair value measurement assumes that the transaction to sell the asset or transfer the liability occurs in the principal market for the asset or liability or, in the absence of a principal market, the most advantageous market. Valuation techniques that are consistent with the market, income or cost approach are used to measure fair value.

The fair value hierarchy prioritizes the inputs to valuation techniques used to measure fair value into three broad levels:

- Level 1 - inputs are based upon unadjusted quoted prices for identical instruments traded in active markets.
- Level 2 - inputs are based upon quoted prices for similar instruments in active markets, quoted prices for identical or similar instruments in markets that are not active, and model-based valuation techniques for which all significant assumptions are observable in the market or can be corroborated by observable market data for substantially the full term of the assets or liabilities.
- Level 3 - inputs are generally unobservable and typically reflect management's estimates of assumptions that market participants would use in pricing the asset or liability. The fair values are therefore determined using model-based techniques that include option pricing models, discounted cash flow models, and similar techniques.

Investments in mutual funds at June 30, 2024, which are all considered level 2, consist of the following:

	<u>Cost</u>	<u>Market</u>
CRI Magnus 60/40 Alpha Plus Fund	\$ 2,334,352	\$ 2,382,151

By fund type at June 30, 2024:

	<u>Cost</u>	<u>Market</u>
Without donor restrictions	\$ 980,641	\$ 989,256
With donor restrictions	<u>1,353,711</u>	<u>1,392,895</u>
Total Investments	<u>\$ 2,334,352</u>	<u>\$ 2,382,151</u>

**Canon Law Society of America  
Notes to Financial Statements  
For the Year Ended June 30, 2024**

**4. Fair Value Measurement and Investments (continued)**

CLSA invests in a professionally managed portfolio that contains mutual funds. Such investments are exposed to various risks such as interest rates, market and credit. Due to the level of risk associated with such investments and the level of uncertainty related to changes in the value of such investments, it is at least reasonably possible that changes in risks in the near term would materially affect investment balances and the amounts reported in the financial statements.

**5. Concentration of Credit Risk**

CLSA maintains its cash and cash equivalents in bank deposit accounts, which at times, may exceed federally insured limits. CLSA has not experienced any losses in such accounts and believes it is not exposed to any significant financial risk on cash and cash equivalents.

**6. Board Designated Funds**

The Board has designated that net income from the sale of publications and books be set aside for use only in the publication activities. As reported on the statement of activities and changes in net assets, the net assets from publications decreased in fiscal year 2024 by \$31,209 to (\$148,606).

**7. Net Assets with Donor Restrictions**

The activity in net assets with donor restrictions for fiscal year 2024 is as follows:

	<b>Scholarship Fund</b>	<b>Doctoral Scholarship</b>	<b>Total</b>
Balance June 30, 2023	\$ 1,030,878	\$ 107,077	\$ 1,137,955
Income	37,150	6,982	44,132
Unrealized gain on investments	120,144	10,829	130,973
Expenses	<u>(37,876)</u>	<u>(288)</u>	<u>(38,164)</u>
Balance June 30, 2024	<u>\$ 1,150,296</u>	<u>\$ 124,600</u>	<u>\$ 1,274,896</u>

**Canon Law Society of America  
Notes to Financial Statements  
For the Year Ended June 30, 2024**

**8. Revenues from Contracts with Customers**

The following table provides information about significant changes in deferred revenue for the year ended June 30, 2024:

<u><b>Membership Dues</b></u>	
Deferred revenue, beginning of year	\$301,437
Revenue recognized that was included in deferred revenue at the beginning of the year	(301,437)
Increase in deferred revenue due to cash received during the year	<u>310,800</u>
Deferred revenue, end of year	<u><u>\$310,800</u></u>
<u><b>Convention Revenue</b></u>	
Deferred revenue, beginning of year	\$ 36,975
Revenue recognized that was included in deferred revenue at the beginning of the year	(36,975)
Increase in deferred revenue due to cash received during the year	<u>25,315</u>
Deferred revenue, end of year	<u><u>\$ 25,315</u></u>

**9. Annual Meeting Site Reservation Agreements**

CLSA has reserved hotel space for future annual meetings. The terms of these reservation agreements provide that a fee will be assessed to CSLA if the reservation is canceled due to site change, within a specified period prior to the meeting dates.

**10. Retirement Plan**

CLSA has a 403(b) Retirement Savings Plan. Eligible employees must meet certain hours and age requirements. Under the plan participants may elect but are not required to defer a portion of their salary up to a maximum allowed by law. The employer contributes 3% of the participant's compensation if the employee participates in the plan. Retirement expense for the year ended June 30, 2024 was \$8,703.

**11. Commitments**

**Office Lease** - In December 2015, CLSA entered into a ten-year lease for office space. Monthly rent payments are \$2,576 currently and increase 3% annually.

**Equipment Lease** - In January 2021, CLSA entered into a fifty-one month lease for a postage machine. Payments of \$226 are billed quarterly.

**Canon Law Society of America  
Notes to Financial Statements  
For the Year Ended June 30, 2024**

**11. Commitments (continued)**

The operating lease liability as of June 30, 2024 consists of the following:

Current portion of operating lease liability	\$ 32,263
Long-term portion of operating lease liability	<u>13,599</u>
Total operating lease liability	<u>\$ 45,862</u>

Future annual minimum lease payments under the leases for the next five years are as follows at June 30:

2025	\$ 33,072
2026	13,663
2027	-
2028	-
2029	<u>-</u>
Total undiscounted cash flows	46,735
Less: present value discount	<u>(873)</u>
Total lease liabilities	<u>\$ 45,862</u>

Lease expense under these leases was \$32,526 for the year ended June 30, 2024 which is included as components of “operating lease expense” on the statement of functional expense.

Additional information regarding these leases is summarized below:

Weighted-average remaining lease term	1.41
Weighted-average discount rate	2.85%

**Canon Law Society of America  
Notes to Financial Statements  
For the Year Ended June 30, 2024**

**12. Liquidity and Availability of Financial Assets**

The following table reflects the CLSA's financial assets as of June 30, 2024, reduced by amounts not available for general expenditures within one year.

Financial assets:	
Cash and cash equivalents	\$ 212,432
Accounts receivable	4,744
Investments	989,256
Investments - scholarship fund	<u>1,392,895</u>
Financial assets, at year-end:	2,599,327
Less those unavailable for general expenditure within one year, due to:	
Donor restrictions	<u>1,274,896</u>
Financial assets available to meet cash needs for general expenses within one year	<u>\$ 1,324,431</u>

CLSA has a policy to structure its financial assets to be available as its general expenditures, liabilities and other obligations come due. The Organization can authorize the transfer of funds from the investment accounts to the operating bank accounts to assist in cash flow needs. Transfers of \$150,000 were made in fiscal year 2024.

**13. Subsequent Events**

Management has evaluated subsequent events through September 11, 2024, the date that the financial statements were available to be issued. There were no significant events to report.

## REPORT OF THE EXECUTIVE COORDINATOR

*Donna Miller, JD, JCL*

The past year has been one of the busiest for CLSA publications since I became Executive Coordinator in 2019. In this annual report, I will summarize the progress that we have made on a number of publications since our 2023 convention.

Our two annual publications—*Proceedings* and *Roman Replies and CLSA Advisory Opinions*—are part of the Executive Coordinator’s duties. From the end of our convention until the following spring, it is the duty of the Executive Coordinator to receive the texts of the major addresses and the seminars from that year’s speakers and prepare them for publication in *Proceedings*. There are 16 seminars and 3 major addresses at each convention, so formatting and editing these texts takes several months to complete. We do the editing “in-house” since hiring a company would mean we would not be able to give *Proceedings* to all our members for free. Asking volunteers to do the work is not practical since it takes many days of concentrated effort to complete each talk to the specifications of our style guide, even when the speakers are also top-notch writers.

Speaking of volunteers, we do have many members who give generously of their time in many ways to help with publications. Most recently there have been about a dozen volunteers who helped to translate from Latin to English the *Excerpta Argumentorum* from *Decisiones seu Sententiae* during the last two years. There are also five volunteers who contributed to the editing, revising, and updating of two handbooks, and six volunteers who are helping with the peer review of those two handbooks, which I will detail later.

The most time-consuming projects over the last year have been the new commentary and the second printing of the Code of Canons of the Eastern Churches.

### **New Commentary**

The commentary project continues to progress. Our content editors are Chorbishop John Faris, Dr. Siobhan Verbeek, Rev. Msgr. John Foster, and Rev. Becket Soule, and our general editor is Rev. Msgr. Ronny Jenkins. As I mentioned in our September newsletter, the commentary is in full-fledged editing mode, with the content editors working directly with the authors on initial content, the general editor reviewing final content, and TextFormations standardizing and formatting completed content. These processes will continue into 2025, with the complex process of indexing set to take place when all of the content is eventually compiled and copyediting is complete. It is still too early to predict when the publication will be ready, but I remain hopeful that it will be sometime in late 2026.

### **Eastern Code**

The second printing of the Eastern code has been submitted to the printer as I write this report. By the time you read this, we should be taking pre-orders. You can check our online store for ordering instructions. As always with new publications, CLSA members receive a substantial discount.

The CLSA published its first English translation of the Eastern code in 1992. In 2001 a new English translation was published and was subtitled *Latin-English Edition: New English Translation*. That means that this 2024 edition—the second printing of that 2001 translation—is actually the third edition of the Society’s Latin-English translations.

In order to bring this project to fruition, we were required by the 1990 norms regarding the translation of the code to seek permission from the Vatican Secretary of State to translate the Latin text. We requested permission in September of 2023, and it was granted in November 2023. However, we did not receive the written notification that permission had been granted until January of 2024, when it was conveyed to us by the Apostolic Nuncio. At that point, we were required to send the English translation to the Eastern Catholic Eparchial Bishops in the United States to get their approval. Their affirmative response came on 23 April 2024. Next, we had to request a contract with the Holy See through the Dicastery for Communications, which is the dicastery that oversees the *Libreria Editrice Vatican* (LEV). That contract was finalized in mid-June, 2024. We also requested and received permission to print the Vatican's English translation of *Praedicate Evangelium* and its Latin text.

Only when all of those pieces were in place could the final work on the new edition be undertaken by our formatter. Because the text had not been updated in over twenty years, technological changes in how files are stored meant we had a hard time finding someone to convert old files into a usable format. Eventually our General Secretary, Kathleen Butler, succeeded in finding someone, which saved us in time and money from having to start from scratch to create the 900+ page book.

In addition to a refinement of the translation itself, the new edition contains all of the changes to the norms that have been made through papal legislation promulgated since 2000, including: *Mitis et Iesus Misericors* (2015) (Title 26); *Ab initio* (2015) (2 canons); *Competentias quasdam decernere* (2022) (8 canons); *Vocare peccatores* (2023) (Title 27); *Expedit ut iura* (2023) (1 canon); and *Iam pridem* (2023) (4 canons). It also includes *Praedicate Evangelium* and updated fontes, index, and tables of corresponding canons.

Special thanks go out to Chorbishop John D. Faris, who was the driving force behind this updated edition of the Eastern code; Sean Doyle was a primary contributor in the updating of the canons and revision of the 2001 translation.

As the Executive Coordinator of the CLSA, I served as the general editor; updated the Index, the Tables of Corresponding Canons, and other supplementary material; proofread the translation; and secured the necessary permissions and license from the Holy See.

### **The Tribunal Handbook**

This publication had been underway for well over a year when we received the sad news in February of 2024 that Father Dan Smilanic had passed away. Father Dan had been working with Sister Victoria Vondenberger to update and revise *The Tribunal Handbook*, which was originally published in 2005 following the release of the instruction *Dignitas connubii*. Sister Vicki considered asking someone else to step in to assist with the project, but after consulting with the chair of the Publications Advisory Board, Monsignor Michael Souckar, she agreed to continue as the principle editor/reviser and to consult with two of the authors who worked on the original text—Father Gary Yanus and Monsignor Michael Padazinski—as needed.

Sister Vicki completed the revision over the summer, and *The Tribunal Handbook* was peer reviewed under the direction of Anne Kirby during the months of August and September. The reviewers were Sister Anna Flanigan, OSF, Shannon Fossett, and Father Christopher Kadrmas. At this writing, their suggested revisions to the text are being considered by Sister Vicki. Further updates on the status of the publication will be announced in Albuquerque at the convention.

## **Clergy Procedural Handbook**

The Clergy Procedural Handbook has also been completed by the editors, Father Peter Mottola and Timothy Olson. The text is now in the hands of a team of peer reviewers; Father Patrick Cooney, OSB, Father John Donovan, and Father Luke Millette are reviewing the text and will soon offer their comments and observations to the authors. This handbook actually is a completely new version rather than a revision or updating of the original 1992 text of the same name. A status update on this important publication will be provided at the convention as well.

## **Conclusion**

In addition to the publications that I have highlighted herein, there are other projects in the works as well. I encourage all of our members to read the updates in our quarterly newsletters, as that is where I often ask for volunteers to assist with the various projects. We are always looking for volunteers to present webinars, so if you have expertise in a specific topic and want to share it with others, please contact me to discuss the possibilities.

I am grateful to all of our members who make my job such a pleasant endeavor. Thank you all for attending the convention in Albuquerque, as your presence here shows your appreciation for and dedication to coming together to experience the Holy Spirit moving among us. Finally, I give thanks to my colleagues in the administrative office, who are such a pleasure to work with; I could not ask for a more competent duo than Kathleen and Mark. My prayer is that God continues to bless and watch over all of us who strive to do His work through our collective focus on and love for the law.



## REPORT OF THE GENERAL SECRETARY

*Kathleen Butler*

As I thought back over this last year and tried to discern a common thread to describe the last 12 months, it would probably be, “Whatever happened to that slow period?” I feel like the last year has been non-stop action, and while there were days when that was exhausting, it tells me that there is really great momentum happening within CLSA.

Of course, the goal is to maintain it, and that will take all of the Society’s members. I want to invite and encourage you to be part of that momentum. I know that the overwhelming demands of work, ministry, families, other volunteer commitments, and life in general makes it impossible to be as involved as you may wish. I would like to challenge you in the coming year to see if there is a way to carve out some time for a few hours of service to CLSA. I feel certain you have some expertise to share, perhaps as a convention seminar or webinar presenter or a podcast presenter (put that JCL or JCD research to use for the good of CLSA’s members!). Submit a question for our list of questions for a dicastery or write an advisory opinion. Reach out to your network on our behalf and ask them to sponsor a seminar at the convention (only \$600!). If your finances allow, make a contribution to our scholarship fund or our general operations fund. This is your organization, and the Strategic Visioning Task Force’s research shows that you have ideas on ways to improve it.

Based on that report, there appears to be confusion about the roles of the staff, the work that we do, and the decisions we make. I can understand how that happened as the Society grew and the way in which work was done evolved.

The Strategic Visioning Report noted that members wanted a better understanding of the “why” behind the decisions. Most of the decisions relate to saving money and/or working more efficiently (which is in itself a cost-saving measure so we don’t have to hire additional staff). I share the rationales for changes in the CLSA e-letter. For example, when we changed the process of receiving *Proceedings* to an “on-demand” option, I explained the challenges and financial realities we were facing with the system that had been in place.

In our written and oral reports at the convention, Fr. Jamin David (our Treasurer) and I have explained the cost-cutting measures we are instituting at conventions, particularly at the behest of the Resource and Asset Management (RAM) Committee, who asked us to find ways for the convention to come closer to breaking even. As Fr. Jamin reported previously, we subsidize between \$75-\$120/convention attendee depending on the year. For many years (at least on paper), the convention made a modest profit or broke even. However, the costs did not include staff time for convention-related work. The staff now allocates their time to specific programs, which you can see in our financial statements in this workbook. Having these sorts of metrics enables us to make *data-driven* decisions. We are working to collect better data for membership- and publications-related costs, so that we can better analyze the costs to serve the membership and publish our books.

At the last few conventions, I’ve shared membership trends; you may recall that student memberships outpace our projections, but new memberships and renewals continue to decline, resulting in a net decrease in the last few years. As of the end of July, we had a 6.58% decrease in Active renewals over that same period in 2023. Of the 1,231 members who were eligible to renew for this fiscal year (FY25), only 1,013 (82%) did. Our membership income is decreasing, and costs

are increasing. These are the realities that we face as we try to maintain our operations and services at the level our members deserve – and have rightly come to expect.

Since it was mentioned in the Strategic Visioning report, let me address staff roles to try to untangle some of the confusion mentioned in the report. Some of the generalities of the staff positions are laid out in the Constitution, which you can see online. If you want more specifics, the staff's job descriptions are appended to the Strategic Visioning Task Force's report. For decades, the CLSA "headquarters" was called the "Office of the Executive Coordinator," staffed by an Executive Coordinator, who oversaw CLSA's editorial and publishing operations and administrative needs. Over time, the work and membership of the Society expanded, and new, sophisticated technology enabled CLSA to work in an entirely different way. It became evident that a separate administrative position was needed.

The General Secretary's position was borne in 2017 out of that need. What had been called the "Office of the Executive Coordinator" was now called the "Administrative Office." (Truthfully, we just call it "the CLSA office.") In 2019, Donna Miller assumed the role of Executive Coordinator, not long after that, in 2020, I joined the staff as General Secretary.

The Executive Coordinator is required by the Constitution to be a canonist. The position has remained focused on canonical content-related matters such as publications, podcasts, webinars, and the like. (Donna is unique in that she is also a civil lawyer.) The General Secretary is required to be an association-management professional to deal with the business side of the Society's work (governance, membership, committees, human resources, finances, facilities, conventions, etc.). If you read the columns that Donna and I write in the quarterly e-newsletter, you probably recognize this distinction. Donna writes exclusively about publications and educational outreach projects, and she takes part in the biennial trips to dicasteries. My columns are generally about dues or the convention or the logistical side of CLSA's work. Donna is likely more visible to you at the convention since as a CLSA member, she participates in the educational aspect of the convention. I'm often behind the scenes, making sure the details are in place.

Confusion may stem from the fact that Donna and I frequently work in tandem, each relying on the other's considerable expertise in a collegial and collaborative partnership. For example, we are both *ex officio* members of the Convention Planning Committee; she provides valuable insight on the content while I manage the administrative details of speakers, space, etc.

I don't want to leave our Membership Coordinator out of this discussion. Mark Francisco joined the staff two years ago and quickly made himself indispensable from an operational and technological perspective. He has taken charge of all of the database development and membership and committee management. He manages convention registrations and publications inventory and fulfillment. He and I work out of the CLSA office in the Theological College in Washington, DC, and Donna works remotely from Florida.

As you can see, with our small staff, the non-stop action I mentioned a page ago is also good for non-stop excitement. There's always some new initiative coming around the corner, or a new idea germinating. I often tell the Board, "anything's possible," and that's true. It might not be fast or easy or cheap, but it's likely possible. That sort of creative exploration of what CLSA can be is for all the membership to own. I hope you will find a way to bring your skills and expertise forward as we work to fulfill our mission.

**Canon Law Society of America  
Resolution Proposals  
86<sup>th</sup> Annual Business Meeting  
October 16, 2024**

***Resolution 1***

**DATE SUBMITTED:** July 2, 2024

**PROPOSED BY:** Board of Governors

**TITLE:** Expanding the Committee on Nominations to Six Voting Members and Separating the Resolutions Committee into a New Item

**STATEMENT OF RATIONALE:** In recent years, there has been a concerted effort by the Board of Governors and Committee on Nominations to seek out diversity on multiple levels of candidates for the Board of Governors. In the recent work of the Strategic Visioning Task Force, the expressed opinion received from the membership is that diversity is lacking and needs to be addressed. It is a real concern that too few people are involved in the process.

**WHEREAS** the Committee on Nominations is a Constitutional Committee of the Canon Law Society of America, its membership is dictated by the Constitution, (Article X, numbers 4 & 5); and

**WHEREAS** the current structure does not reflect the evolving diversity of the membership; and

**WHEREAS**, it would seem practical to separate in the Constitution the composition of the Committee on Nominations and the Committee on Resolutions, with their respective functions and other subsequent numbers under Article X renumbered as necessary.

**BE IT RESOLVED** that the “Nominations Committee” and the “Resolutions Committee” be separate committees and that the “Nominations Committee” consist of six voting members and the “Resolutions Committee” consist of three voting members, and that the CLSA Constitution be amended to reflect these changes and provide further clarity regarding the mandate of each committee.

Article X 4 of the CLSA Constitution is amended as follows:

4. The Committee on Nominations ~~and the Committee on Resolutions~~ shall consist of ~~three~~ six voting members appointed by the President. Consultative members may be appointed at the discretion of the President.
  - a. The term of office of committee members shall be for three years but shall be so arranged so that each year, the term of ~~one~~ two members of the committee will expire with the close of the Annual General Meeting; the new members of the committee shall be appointed by the new President within thirty days after the close of the Annual General Meeting.
  - b. The President appoints a senior member of the ~~each~~ committee who is senior by appointment shall act as chairperson of each respective committee within thirty days after the close of the Annual General Meeting.
  - c. In the event of death or resignation of a committee member, the President shall appoint a new member to complete the unexpired portion of the term of office.

- d. In addition to its members, the Committee on Nominations shall have the Past President as a non-voting member (unless a tie-breaking vote is required) with an active voice, and who also serves as secretary to the committee.
  - e. The functions of the Committee on Nominations shall be:
    - i. To submit to the Active members, at least ~~one~~ three months prior to the date of election, the names of nominees as provided for in Article IX of this Constitution.
    - ii. To formulate and recommend to the Board of Governors plans for maintaining and increasing the membership of the Society.
- ~~5. The functions of the Committee on Nominations shall be:~~
- ~~a. To submit to the active members, at least one month prior to the date of election, the names of nominees as provided for in Article IX of this Constitution.~~
  - ~~b. To formulate and recommend to the Board of Governors plans for maintaining and increasing the membership of the Society.~~
5. The Committee on Resolutions shall consist of three voting members appointed by the President. Consultative members may be appointed at the discretion of the President.
- a. The term of office of committee members shall be for three years but shall be so arranged that each year the term of one member of each the committee will expire with the close of the Annual General Meeting; the new member of each the committee shall be appointed by the new President within thirty days after the close of the Annual General Meeting.
  - b. The member of each the committee who is senior by appointment shall act as chairperson of each respective the committee.
  - c. In the event of death or resignation of a committee member, the President shall appoint a new member to complete the unexpired portion of the term of office.
  - d. ~~In addition to its members, the Committee on Nominations shall have the Past President as a non-voting member and secretary.~~ The functions of the Committee on Resolutions shall be:
    - i. To solicit, develop, and draft proposed resolutions which will express the concerns of the Canon Law Society of America;
    - ii. To consult with the membership at large and, in particular, with the Board of Governors, the standing and ad hoc committees of the Society and the organizers of the convention;
    - iii. To formulate proposed resolutions on given points in response to requests of the members of the Society;
    - iv. To compose differences in the formulation of similar proposals and to revise all proposals so that the meaning of each is clear;
    - v. To encourage resolutions which authentically express in a positive way the activities and concerns of the Society.

**So that it reads:**

- 4. The Committee on Nominations shall consist of six voting members appointed by the President. Consultative members may be appointed at the discretion of the President.
  - a. The term of office of committee members shall be for three years but shall be so arranged so that each year, the term of two members of the committee will expire with

the close of the Annual General Meeting; the new members of the committee shall be appointed by the new President within thirty days after the close of the Annual General Meeting.

- b. The President appoints a senior member of the committee within thirty days after the close of the Annual General Meeting.
- c. In the event of death or resignation of a committee member, the President shall appoint a new member to complete the unexpired portion of the term of office.
- d. In addition to its members, the Committee on Nominations shall have the Past President as a non-voting member (unless a tie-breaking vote is required) with an active voice, who also serves as secretary to the committee.
- e. The functions of the Committee on Nominations shall be:
  - i. To submit to the Active members, at least three months prior to the date of election, the names of nominees as provided for in Article IX of this Constitution.
  - ii. To formulate and recommend to the Board of Governors plans for maintaining and increasing the membership of the Society.

5. The Committee on Resolutions shall consist of three voting members appointed by the President. Consultative members may be appointed at the discretion of the President.

- a. The term of office of committee members shall be for three years but shall be so arranged that each year the term of one member of the committee will expire with the close of the Annual General Meeting; the new member of the committee shall be appointed by the new President within thirty days after the close of the Annual General Meeting.
- b. The member of the committee who is senior by appointment shall act as chairperson of the committee.
- c. In the event of death or resignation of a committee member, the President shall appoint a new member to complete the unexpired portion of the term of office.
- d. The functions of the Committee on Resolutions shall be:
  - i. To solicit, develop, and draft proposed resolutions which will express the concerns of the Canon Law Society of America;
  - ii. To consult with the membership at large and, in particular, with the Board of Governors, the standing and ad hoc committees of the Society and the organizers of the convention;
  - iii. To formulate proposed resolutions on given points in response to requests of the members of the Society;
  - iv. To compose differences in the formulation of similar proposals and to revise all proposals so that the meaning of each is clear;
  - v. To encourage resolutions which authentically express in a positive way the activities and concerns of the Society.

And the subsequent paragraphs in Article X be renumbered accordingly.

**IMPLEMENTATION BY MEANS OF:**

- 1. In order to comply with the amendment, the President shall appoint members to the Committee on Nominations within 30 days of the close of the 2024 Annual General Meeting as follows:

- a. One new member to serve one year (term ending 2025)
- b. One new member to serve two years (term ending 2026)
- c. Two new members to serve three years (term ending 2027)

**ANTICIPATED COST:**

1. Staff time in communication
2. If travel by the Committee on Nominations is deemed necessary, an additional \$4,000 in the FY 25 budget

**COST SUPPLIED BY:** CLSA Budget

## ***Resolution 2***

**DATE SUBMITTED:** June 17, 2024

**PROPOSED BY:** Strategic Visioning Task Force

**TITLE:** Appointment of a Constitutional Task Force

### **STATEMENT OF RATIONALE:**

**WHEREAS,** the current Constitution and By-Laws of the CLSA may no longer adequately reflect the evolving needs and challenges of the Society and its members;

**WHEREAS,** the proposed resolutions approved at this assembly necessitate, if passed, a comprehensive review and potential revision of the Constitution and By-Laws to ensure consistency and effective governance;

**WHEREAS,** appointing a Constitutional Task Force will ensure a thorough and thoughtful review process, involving study and consultation with necessary experts, including a civil attorney;

**WHEREAS,** updating the governing documents of the Society is essential for its growth, stability, and responsiveness to its membership's needs and aspirations.

**BE IT RESOLVED** that the Board of Governors appoint a Constitutional Task Force, whose mandate would be (after study and consultation as necessary) to incorporate the resolutions approved at this assembly and move on to draft and propose by one or more resolutions a new and revised Constitution—and, if needed or desired, corresponding By-Laws. The Constitutional Task Force would consist of no more than five members (one of whom should be a civil attorney), complete its work over a 2-year period, and propose its revisions at the 2026 Convention.

**IMPLEMENTATION BY MEANS OF:** Task Force appointed by the Board of Governors for two years

**ANTICIPATED COST:** Based on the expenses and experience of the Strategic Visioning Task Force, the anticipated costs are \$15,000 for two years.

**COST SUPPLIED BY:** CLSA operating expenses

### ***Resolution 3***

**DATE SUBMITTED:** June 17, 2024

**PROPOSED BY:** Strategic Visioning Task Force

**TITLE:** Dissemination of Minutes

#### **STATEMENT OF RATIONALE:**

**WHEREAS**, there is a general sense among the membership that the internal workings of the Society, particularly those of the Board of Governors (BOG), committees, task forces, and subcommittees, are not widely understood;

**WHEREAS**, improving transparency and accountability in the decisions made by the BOG is crucial for fostering trust and engagement among the members;

**WHEREAS**, recent attempts at improving transparency and accountability, such as opening nominations for the Role of Law awardee, have been well-received and should be continued and expanded;

**WHEREAS**, there is a uniform, concise template for Recording and Archiving Committee Minutes approved by the BOG and issued in February 2024 to be utilized, that would be helpful in preparing other materials;

**WHEREAS**, better communication regarding issues such as copyright and intellectual property is necessary to address the increasing concerns and challenges faced by the Society;

**WHEREAS**, enhancing the transparency and accountability of the Society's governance will align with the desires expressed by the membership in the Strategic Visioning surveys and listening sessions;

**BE IT RESOLVED** that moving forward an executive summary of minutes, reports and relevant handouts of meetings of the Board of Governors, committees, task forces, and subcommittees be posted on the CLSA website for all members to view, according to the accepted CLSA protocol and in conformity with civil laws.

**IMPLEMENTATION BY MEANS OF:** Actions of the Board of Governors

**ANTICIPATED COST:** Digital posting should not add additional costs beyond staff time.

**COST SUPPLIED BY:** CLSA operating expenses

## ***Resolution 4***

**DATE SUBMITTED:** June 17, 2024

**PROPOSED BY:** Strategic Visioning Task Force

**TITLE:** Consultants to Take on the Role of Standing Committee Chairs

### **STATEMENT OF RATIONALE:**

**WHEREAS**, there is a recognized need to increase transparency and accountability within the committees that manage much of the Society's work;

**WHEREAS**, the current nomination process for committee positions is perceived as too insular and lacking sufficient membership input;

**WHEREAS**, of the four constitutional committees, Resource and Asset Management, Professional Responsibility, and Nominations Committees already have a strong BOG presence; and the Resolutions Committee needs to act independently;

**WHEREAS**, electing Chairs of the six standing committees directly by the membership will provide a more democratic and inclusive process, better ensuring diverse representation and fresh perspectives;

**WHEREAS**, combining the roles of Committee Chairs and Consultants should enhance the effectiveness of the committees and strengthen the connection between the committees and the BOG;

**WHEREAS**, such a structure should better provide for the Committee Chairs to pursue aspirational goals and long-term projects, benefiting the Society's mission and activities;

**BE IT RESOLVED** that the Chairs of the six standing committees be elected to these positions by the membership. These elected Chairs shall simultaneously serve as the six Consultants on the BOG. The details of this change are to be designed and implemented by a task force appointed by the BOG over a 3-year period until in place.

**IMPLEMENTATION BY MEANS OF:** Task Force mandated by the Board of Governors

**ANTICIPATED COST:** Based on the expenses and experience of the Strategic Visioning Task Force, the anticipated costs are \$7,500 for a planning meeting.

**COST SUPPLIED BY:** CLSA operating expenses

## ***Resolution 5***

**DATE SUBMITTED:** June 17, 2024

**PROPOSED BY:** Strategic Visioning Task Force

**TITLE:** Eliminating Research and Development Committee

### **STATEMENT OF RATIONALE:**

**WHEREAS,** the Task Force identified overlapping responsibilities between the Research and Development Committee and other committees, leading to inefficiencies;

**WHEREAS,** the work done by the Research and Development Committee could be managed by the Publications Advisory Board and the Convention Planning Committee;

**WHEREAS,** eliminating redundancy in committee functions will streamline operations and better allocate resources within the Society;

**WHEREAS,** a more focused committee structure will enhance the Society's ability to meet its objectives and address the needs of its members;

**BE IT RESOLVED** that the Research and Development Committee be eliminated, its duties then subsumed into other committees or by others. The details of this change are to be designed and implemented by the BOG.

**IMPLEMENTATION BY MEANS OF:** Action of the Board of Governors

**ANTICIPATED COST:** There is no cost in addition to a regular meeting of the BOG.

**COST SUPPLIED BY:** CLSA operating expenses

## ***Resolution 6***

**DATE SUBMITTED:** June 17, 2024

**PROPOSED BY:** Strategic Visioning Task Force

**TITLE:** Emeritus Membership Category

### **STATEMENT OF RATIONALE:**

**WHEREAS,** there is significant interest among members for the development of an emeritus membership category to recognize and accommodate long-standing members who may have retired from active ministry or professional roles;

**WHEREAS,** members upon retirement may no longer be funded for CLSA membership and activities, causing a considerable number to leave the Society, and reducing fees would retain their membership to continue to provide income for the Society;

**WHEREAS,** creating an emeritus membership category would acknowledge the valuable contributions of senior members while addressing concerns about the cost of membership dues and convention attendance;

**WHEREAS,** the introduction of this category could help maintain engagement and support from senior members, ensuring their continued involvement and contribution to the Society's mission;

**BE IT RESOLVED** that a task force appointed by the BOG develop a new emeritus membership category, the details of which must be presented for a resolution at the Convention in October 2025.

**IMPLEMENTATION BY MEANS OF:** Task Force appointed by the Board of Governors for one year

**ANTICIPATED COST:** Based on the expenses and experience of the Strategic Visioning Task Force, the anticipated costs are \$7,500 for one year.

**COST SUPPLIED BY:** CLSA operating expenses

## ***Resolution 7***

**DATE SUBMITTED:** June 17, 2024

**PROPOSED BY:** Strategic Visioning Task Force

**TITLE:** Renaming Nominations Committee

### **STATEMENT OF RATIONALE:**

**WHEREAS,** the current nominations process for BOG positions is perceived as overly secretive and exclusive, limiting member participation and transparency;

**WHEREAS,** renaming the Nominations Committee to the Elections committee will reflect a broader and more inclusive approach to the nomination and election processes;

**WHEREAS,** the new procedures, including increasing the number of voting members on the committee and ensuring clear eligibility requirements, will enhance fairness and transparency;

**WHEREAS,** the proposed changes aim to increase member engagement and ensure that the leadership of the Society more accurately reflects its diverse membership;

**BE IT RESOLVED** that the Nominations Committee be renamed as the Elections Committee and that the new procedures recommended in the CLSA Strategic Visioning Task Force Report of June 10, 2024, III.H Roles of Committees (p. 11) be implemented.

**IMPLEMENTATION BY MEANS OF:** Action of the Board of Governors

**ANTICIPATED COST:** There is no cost in addition to a regular meeting of the BOG.

**COST SUPPLIED BY:** CLSA operating expenses

## ***Resolution 8***

**DATE SUBMITTED:** July 17, 2024

**PROPOSED BY:** Michael Joyce, CM

**TITLE:** Naming of Scholarship Funds

### **STATEMENT OF RATIONALE:**

**WHEREAS** the CLSA established a scholarship fund in 1970 in memory of Monsignor Clement Bastnagel who served as General Secretary of the Society from its beginning in 1939 until 1966 and who was succeeded by Rev. James Coriden, and

**WHEREAS**, the Reverend James Coriden moved forward a resolution in 1985 for the establishment of the current scholarship fund,

**BE IT RESOLVED** the Canon Law Society of America name its scholarship funds for students studying for the licentiate the Coriden Fund and

**BE IT FURTHER RESOLVED THAT** the Society name its scholarship fund for students studying for the doctoral decree the Bastnagel Fund.

**IMPLEMENTATION BY MEANS OF:** The use of the names in publication of the scholarship.

**ANTICIPATED COST:** \$0.00

**COST SUPPLIED BY:** Budget for Publication about Scholarships

## CONSTITUTIONAL COMMITTEES

**Committee:** Nominations

**Constituted:** Constitutional Committee

**Mandate:** Articles IX and X of the Constitution

1. To submit to the active members, at least one month prior to the date of election, the names of nominees as provided for in Article IX of the Constitution
2. To formulate and recommend to the Board of Governors plans for maintaining and increasing membership in the Society. And, in accord with Article X, revise all proposals so that the meaning of each is clear.

**Members:** Dr. Susan Mulheron, chair, Washington, District of Columbia (2024)  
Dr. Zabrina Decker, Milwaukee, Wisconsin (2025)  
Very Rev. Greg Luyet, Little Rock, Arkansas (2026)

**BOG Liaison:** Very Rev. John Donovan, Past President

### REPORT

The Nominations Committee has not had any activity since our last report.

**Submitted By:** Susan Mulheron  
June 27, 2024

**Committee:** Resolutions

**Constituted:** Constitution, Article X 2009

**Mandate:** The mandate of the Committee on Resolutions is as follows:

1. To solicit, develop and draft proposed resolutions which will express the concerns of the Canon Law Society of America;
2. To consult with the membership at large and, in particular with the Board of Governors, the standing and ad hoc committees of the Society, and the organizers of the annual convention;
3. To formulate proposed resolutions on given points in response to requests of the members of the Society;
4. To compose differences in the formulation of similar proposals and to revise all proposals so that the meaning of each is clear; (and)
5. To encourage resolutions which authentically express in a positive way the activities and concerns of the Society.

**Members:** Ms. Amy Tadlock, chair, St. Paul, Minnesota (2024)  
Dr. Linda Budney, Bethesda, Maryland  
Deacon Daniel Laurita, Athens, Alabama  
Rev. Langes Silva, Salt Lake City, Utah

**BOG Liaison:** Sr. Rose Timmer, RSM

## **REPORT**

The Committee met on August 2, 2024 to review the eight proposed resolution received. A few changes were recommended.

**Submitted By:** Amy Tadlock  
August 19, 2024

**Committee:** **Resource and Asset Management**

**Constituted:** Constitutional (See Article X)

**Mandate:** It is the function of the Committee on Resource & Asset Management to:

1. Develop a comprehensive budget for all the activities of the Society and report on the funding available for projects;
2. To submit the proposed budget for the coming fiscal year to the Board of Governors for approval at its spring meeting;
3. To conserve, invest, and disperse the monies of the Scholarship Fund in accord with the criteria established by the Society; (and)
4. To advise the Treasurer on all matters pertaining to the Society's investments (Article X, 7).

**Membership:** Very Reverend Jamin Scott David, chair, Baton Rouge, Louisiana (2025)  
Reverend Thomas Cronkleton, Jr., Cheyenne, Wyoming (2025)  
Reverend Chris Palladino, West Roxbury, Massachusetts (2025)  
Very Reverend Patrick Cooney, Saint Meinrad, Indiana (2024) (*ex officio, Vice President*)  
Dr. David Castronovo, Beaumont, Texas, (2024) (*ex officio, Consultor*)  
Reverend Kevin Niehoff, OP, Grand Rapids, Michigan (2024) (*ex officio, Past Treasurer*)

## REPORT

The Committee on Resource and Asset Management met on 02 April 2024 virtually via the Go To Webinar platform. The meeting began at 1:04PM CST. Present were Fathers Jamin David, Chris Palladino, Thomas Cronkleton, Patrick Cooney, and Kevin Niehoff, Mr. David Castronovo, and Ms. Kathleen Butler.

After Father Palladino led the group in an opening prayer, Father David asked members to introduce themselves. He also gave a quick review of the functions of the Committee on Resource and Asset Management as defined by the CLSA, namely to:

1. Develop a comprehensive budget for all the activities of the Society and report on the funding available for projects;
2. To submit the proposed budget for the coming fiscal year to the Board of Governors for approval at its spring meeting;
3. To conserve, invest, and disperse the monies of the Scholarship Fund in accord with the criteria established by the Society; (and)
4. To advise the Treasurer on all matters pertaining to the Society's investments (Article X, 7).

Father David then presented to the group a financial review including a balance sheet and profit and loss statement as of 28 February 2024. Total assets of the Society, including cash assets in operating accounts, accounts receivable, prepaid expenses, inventory assets, fixed assets, and investment accounts totaled \$2,587,108.94 as compared to assets in July 2023 that totaled \$2,754,076.26. Liabilities and equity including accounts payable, credit card balances, accrued royalty expenses, accrued payroll expenses, and deferred revenue totaled \$183,451.46 as compared to liabilities in July 2023 totaling \$319,592.83.

The Profit and Loss statement, as presented, shows a total income of \$927,043.07 for the period July 2023 through February 2024. Expenses totaled \$600,270.40 for the same period. Thus, net income for the period totaled \$326,772.67. Detailed statements were presented to committee members for review. Father David noted that market volatility has positively adjusted in the past several months, contributing to better-than-anticipated gains for investments. However, he warned that the lack of scheduled publications for printing by the Society coupled with higher convention costs will dramatically impact the “bottom line” moving forward, resulting in negative cash flow.

Father David then presented a proposed budget for the 2024/2025 fiscal year. The proposed budget would include \$720,120 in revenue, primarily generated from membership dues, investment income, conference fees, and minimal publication sales from a reprint of the *Code*. Anticipated expenses would total \$1,113,496.00 which would primarily include expenses related to the annual convention, Board of Governors and Committee work, publication expenses including storage and shipping, salaries, and operating expenses, and moving cash back into investments, resulting in a \$393,376.00 deficit. After discussion, a motion was made by Father Cronkleton and seconded by Father Niehoff that the proposed budget, as presented with some minor modifications, be forwarded to the Board of Governors for consideration and approval. There were no objections to this motion, and it passed unanimously.

Father David then updated the committee regarding the CLSA Scholarship Funds. While contributions from membership increased in FY 2023/2024, there is still a desire to grow the investment corpus for both the JCL and JCD funds to highlight the need to educate more canonists. At the President and Treasurer’s insistence, every member last year’s Board of Governors contributed in 2023 to the Scholarship Fund; the BOG has nearly met that goal for 2024 as well. After reviewing the policy for scholarship disbursements, a motion was made by Father Cronkleton and seconded by Father Niehoff that for 2024, a maximum award to scholarship applicants of \$45,000 plus administrative costs be granted from the JCL fund, and that a maximum award to scholarship applicants of \$4,000 plus administrative costs be granted from the JCD fund. There were no objections to this motion, and it passed unanimously.

Given the precarious budgetary situation, and declining revenue of the Society, after discussion, Father Cronkleton made a motion that was seconded by Father Niehoff that the Board of Governors consider raising the convention registration fees to for adequately reflect the actual costs per attendee. There were no objections to this motion, and it passed unanimously. Father David and Ms. Butler noted that fees for the 2024 Convention in Albuquerque have already been fixed and advertised.

Father David noted that he and Ms. Butler, with the cooperation of the BOG, have also made concerted efforts to reduce the costs of the convention. Some changes in 2024 include a print-on-demand option for the usual convention booklet (with costs passed to those wishing to have a printed copy), and the discontinuation of the usual convention tote bags. Father Cronkleton made a motion that was seconded by Father Niehoff that the BOG investigate further ways to reduce costs for the annual convention, including the consideration that the number of host cities be limited. Hearing no objections to this motion, it also passed unanimously.

Given the length of the meeting, Father David asked committee members to consider tabling the other two planned agenda items, namely the discussion regarding investment strategies and other ideas for cost savings. Specifically, he asked committee members to brainstorm potential strategies to determine best practices for use of investment funds and growth of their corpus. These would be discussed at the next RAM meeting.

Finally, Father David expressed the desire that the committee meet quarterly to review financial performance, specifically in early May, early August, and early November (in addition to the early April meeting). Ms. Butler will prepare a survey with potential dates to enable committee members to adequately prepare.

With no other business, the meeting adjourned at 2:53PM CST after the *Glory Be* was led by Father David.

**Submitted By:** Very Reverend Jamin Scott David, JCL  
*Treasurer & Chair of the Committee on Resource & Asset Management*  
April 3, 2024

**Committee:** Professional Responsibility

**Constituted:** Constitution, Article X (as last amended in 1995)

**Mandate:** The mandate of the committee is as follows:

1. Regarding complaints:
  - a. To receive complaints of any party aggrieved with respect to provisions of the Code of Professional Responsibility of the CLSA;
  - b. To make an initial finding that the complaint is not frivolous but is serious in character;
  - c. By majority vote, to refer the matter to one of the Hearing Officers;
2. To issue advisory opinions and decisions on the application of the Code of Professional Responsibility; (and)
3. To advise on all other questions concerning the professional responsibility of canonists.

**Members:** Dr. David Castronovo, chair, Wilmington, Delaware (2024)  
Sr. Tracey Sharp, SCRH., Rancho Palos Verdes, California (2024) (*ex officio*,  
Consultor)  
Msgr. Stephen Doktorczyk, Washington, District of Columbia (2025) (*ex officio*,  
Consultor)  
Dr. Michael Dunnigan, Hearing Officer, Saint Meinrad, Indiana (2025)  
Dr. Andrea Ponzzone, Hearing Officer, Weymouth, Massachusetts (2026)

## **REPORT**

The Committee received and addressed one formal complaint. Due to a possible conflict of interest, Dr. David Castronovo recused himself. Dr. Benedict Nguyen, Consultor on the Board of Governors, served on the committee as an ad hoc member. A decision was made and communicated to both the complainant and the accused member.

**Submitted By:** Sr. Tracey Sharp, SCRH  
September 17, 2024

## ONGOING COMMITTEES

**Committee:** Clergy

**Constituted:** 2009

**Mandate:** It is the function of the Committee on Clergy:

1. To initiate as needed any projects pertinent to the study of canon law pertaining to the life and ministry of bishops, priests and deacons or the implementation thereof, including, but not limited to, the following:
  - o canonical issues related to the sexual abuse of minors,
  - o clergy personnel issues and resources,
  - o advocacy for clergy in penal cases;
2. To oversee projects referred to the committee by the BOG;
3. To oversee its subcommittees working on projects concerning clergy; and
4. To collaborate with national organizations and other groups dealing with clergy issues.

**Members:** Rev. Ernie Jun Karol G. Carpio, JCL , chair, Beaumont, Texas (2024)  
Rev. James Bradley, Committee Member, Washington, District of Columbia (2024)  
Rev. John D. Dickinson, Committee Member, Scarborough, Maine (2026)  
Rev. Dcn. Michael Forbes, Committee Member, Austin, Texas (2025)  
Rev. Robert Hyde, Jr., Committee Member, Camillus, New York (2025)  
Ms. Fiona Laverty, Committee Member, Jefferson City, Missouri (2026)  
Most Rev. Ed Lohse, Committee Member, Kalamazoo, Michigan (2026)  
Rev. Pius Pietrzyk, Washington, District of Columbia (2024)

**BOG Liaison:** Msgr. Robert Oliver

### REPORT

The Committee on the Clergy is still working on the Clergy Procedural Handbook. I was able to reach out with Timothy Olson, former member of the Clergy Committee and one of the persons who spearheaded the project. He expressed to me that it is on its final stage for editing and proofreading. It will be published as soon as it is finished. Another goal of the committee is with regard to the Circular Letter regarding Rights of Recurrent in Administrative Recourse. It is still on the process. We are still working whether we have to continue in actualizing this goal.

**Submitted By:** Rev. Ernie Jun Karol G. Carpio, JCL  
July 12, 2024

**Committee:** Convention Planning

**Constituted:** 1971

**Mandate:** It is the function of the Committee on Convention Planning:

1. To receive from the Board of Governors the approved general theme of the next convention as well as any suggestions from the Committee on Research and Development for the development of the theme;
2. To recommend to the BOG, in accord with the general theme, topics for major addresses, seminars or other presentations at future conventions, as well as a list of potential speakers and the honoraria for such speakers;
3. Following BOG approval, to arrange for the speakers, addresses and seminars for the annual convention;
4. To oversee the planning of all convention liturgies and prayer services in cooperation with its subcommittee for Convention Liturgies; (and)
5. To review the evaluations of the most recent Convention and assist the Convention Chairperson in planning future arrangements, as needed.

**Members:** Mr. Jay Conzemius, chair, Bethel Park, Pennsylvania (2024)  
Dr. Felix Menendez, Smyrna, Georgia (2025)  
Mrs. Adrienne Yates, Chapel Hill, North Carolina (2025)  
Rev. Mr. Gerry Jorgenson, Dubuque, Iowa (2026)  
Msgr. Stephen Pedone, Worcester, Massachusetts (2026)  
Rev. Christopher Sherren, Charlestown, Prince Edward Island, Canada (2026)  
Mr. Chad Glendinning, Ottawa, Ontario, Canada (2026)  
Reverend John Donovan, Hamilton, New York (*ex-officio*, Past President)  
Mrs. Donna Miller, The Villages, Florida, (*ex-officio*, Executive Coordinator)  
Ms. Kathleen Butler, Washington, District of Columbia (*ex-officio*, General Secretary)

**BOG Liaison:** Rev. Patrick Cooney, OSB

## REPORT

The Convention Planning Committee met in person with each other at the Bethany Center in Lutz, FL on April 3-4, 2024. There were follow-up virtual meetings on April 23, May 13, May 31, June 21, and August 21. At this point, virtually the entire slate for the 2025 Convention and Pre-Convention Workshops is set and may be reviewed below.

As for the 2026 convention, there are several seminars confirmed (see below) and several that are waiting to be confirmed. The committee has proposed an entire slate for 2026 and the hope is to secure the few BOG approvals that are still needed, so the remaining speaker opportunities may be finalized. At this point, a possible keynote and a major address speaker have also been contacted and responses are pending. In 2026, the hope is to have only one pre-convention session and the other session will be offered as a Canonist Wellness Retreat.

Mr. Jay Conzemius (chair) and Rev. John Donovan (BOG Past President) have served their entire term on this committee, so each is scheduled to be replaced after this year's convention.

## **2025 Convention (Orlando, FL):**

Virtually all of the slate for the 2025 Convention has been confirmed:

<b>Keynote</b>	Sr. Nathalie Becquart Canonical Issues Coming out of Synod
<b>Major Addresses</b>	Most Rev. David Motiuk, JCL, JCOD Current Issues for Eastern Catholics  Most Rev. Brian Dunn, JCD Sacramental/Liturgical Issues Particularly Relating to the Merging of Parishes
<b>Seminars</b>	Dr. Siobhan Verbeek, JCD Protections/Policies for Whistleblowers Rev. Tom Kunz, JCD Reorganization of Diocesan Parishes Rev. Msgr. Stephen Doktorczyk, JCD How to Write Particular Law Rev. Thomas Gaunt, SJ, PhD Trends in Catholic Religious Practice Rev. Dr. Jerry Jorgensen, JCL Canon 1678.3 Evidently Useless to Use an Expert Rev. Leo Walsh, JCL, STD The Challenge of Catholic Muslim Marriage Rev. Msgr. Ronny Jenkins, JCD Trends in Rotal Jurisprudence Mr. Jay Conzemius, JCL and Very Rev. Luke Millette, JCL Best Practices for Tribunals with Respect to Sexual Abuse Allegations of a Minor Very Rev. Ken Riley, JCL Social Communications Rev. Msgr. John Renken, JCD Book V Meets Book VI Mr. Richard Verver, JCL Imputability in Penal Law Rev. Matt Duclos Best Practices on Boundary Issues Sr. Tracey Sharp, SCRH, JCL New groups seeking recognition in the diocese as religious institutes Mrs. Donna Miller, JCL Compensation of Religious by Catholic Organizations
<b>Pre-Convention Workshops</b>	Most Rev. Alejandro Arellano, JCD 10 years after Mitis: Implementation & Practice  Rev. Bryan Pham, SJ, JD, JCD, Ph.D. and Mr. Rod Valdivia, JCL Bankruptcy Issues

## **2026 Convention (St. Louis, MO):**

We are continuing to work on the program for the 2026 convention. So far, the following seminar speakers are confirmed:

### **Seminars**

Dr. Zabrina R. Decker, JCD  
Pope Francis and the Advancement of Lay Persons  
Rev. Christopher R. Seibt, PhL, STL, JCL  
Relegation of Church Buildings to Profane But Not Sordid Use  
Rev. Robert Herbst, OFM Conv., JCD  
Intercultural Competencies in Tribunal Work - Deaf Culture  
Linda Budney, JCD  
Marriage and OCIA Issues/Concerns  
David Castronovo, JCD  
Dilatory Appeal  
Fr. Valere Nkouaya Mbandji, SJ, JCD  
Financial Crimes  
Rev. Msgr. Robert Oliver, JCD  
Various Tribunal Models

**Committee:** Eastern Churches

**Constituted:** 2018

**Mandate:** The mandate of the committee is as follows:

1. To foster the study of the law of the Eastern Catholic and Eastern non-Catholic Churches through seminars at CLSA conventions and symposia and in publications and translations.
2. To serve as a resource to respond to inquiries regarding pastoral questions involving Eastern Christians.
3. To serve as a resource to other CLSA Committees when initiatives call for consideration of Eastern Catholic issues.
4. To promote the involvement of canonists proficient in Eastern canon law in the Society.
5. To promote the unity of Churches in all publications and discussions.

**Members:** Dr. Margaret Chalmers, chair, Birmingham, Alabama (2024)  
Rev. Ron Barusefski, Harrisburg, Pennsylvania (2026)  
Dr. Sean Doyle, North Wales, Pennsylvania (2025)  
Chorbishop John D. Faris, Glen Allen, Virginia (2027)  
Rev. George Oonnoony, Buchanan, New York (2024)  
Rev. Ed Shestak, Old Forge, Pennsylvania (2025)

**BOG Liaison:** Rev. Msgr. Stephen Doktorczyk

## REPORT

The committee met by Zoom on January 18, 2024. The committee has been working on two projects.

The process for publishing the Code of Canons of the Eastern Churches, Revised English Translation is almost complete. This is the third English translation that the Canon Law Society has produced since the promulgation of the Eastern code in 1990. The Code is complete. Chorbishop Faris has submitted the text to the Bishops and is waiting for their approval. Once approval is received, a Forward will be added, and the text will be sent to the printers.

The committee is continuing to draft the handbook that stemmed from our pre-convention presentation in 2022 regarding best practices for issues surrounding priests who are married. Margaret Chalmers and Sean Doyle are the editors.

Finally, we brainstormed ideas for future projects.

**Submitted by:** Margaret P. Chalmers  
January 30, 2024

**Committee:** **Institutes of Consecrated Life and Societies of Apostolic Life**

**Constituted:** 2009 (Revised Mandate 2019)

**Mandate:** The mandate of the committee is as follows:

1. To initiate as needed any projects pertinent to the study of canon law pertaining to the life and ministry of Institutes of Consecrated Life and Societies of Apostolic Life or the implementation thereof, including, but not limited to, the following:
  - a. sponsorship;
  - b. mergers and restructuring of institutes;
  - c. governance;
  - d. membership;
  - e. new forms of consecrated life;
  - f. the process for private and public associations to be established as Institutes of Consecrated Life or Societies of Apostolic Life.
2. To initiate as needed any projects pertinent to the study of canon law pertaining to the life and ministry of solitary forms of consecrated life, including but not limited to, the following:
  - a. eremitic or anchoritic life;
  - b. hermits;
  - c. consecrated virgins;
  - d. widows.
3. To oversee projects referred to the committee by the BOG.
4. To oversee its subcommittees working on projects concerning any form of religious life listed in 1 or 2 above.
5. To collaborate with national organizations and other groups dealing with issues of any form of religious life listed in 1 or 2 above.

**Members:** Sr. Mariette Moan, ASCJ, chair, New Britain, Connecticut (2025)  
Dr. Christina Hip-Flores, Brentwood, Maryland (2024)  
Sr. Lien Do, OP, Washington, District of Columbia (2025)  
Bishop Elias Lorenzo, OSB, Summit, New Jersey (2025)  
Msgr. Fredrik Hansen, Baltimore, Maryland (2026)  
Rev. Valere Mbanji, SJ, Ottawa, Ontario (2026)

**BOG Liaison:** Sr. Tracey Sharp, SCRH, Rancho Palos Verdes (2024)

## **REPORT**

The ICLSAL Committee held three online meetings on February 19, April 15, and May 27, and will meet again on September 12, 2024. It will meet in person during the 2024 Convention in Albuquerque, New Mexico and resume Zoom meetings after the convention. Subcommittee pairs have been in communication as well.

From the onset a dual focus emerged: that the work of the committee contribute to the life of the Church and that it offer assistance to organizations that deal with the various forms of consecrated life on the national level. These two areas of focus have informed and will continue to guide the priorities, initiatives, and action steps of the committee.

Initial discussions aimed at exploring topics related to the current realities of consecrated life both in the local and universal Church and which are reflective of the committee mandate. The intention is to make resources available, including webinars, for diocesan canonists, vicars for religious life, and members of religious institutes, particularly leadership teams.

Members of the committee as a whole are committed to raising the profile of the Committee to be an active, contributing group in support of the mission and aims of the CLSA and to have a more active presence at future CLSA conventions. A proposal was accepted that subcommittees be established within the group to advance three concrete initiatives to begin immediately. Each subcommittee is meeting and providing proposed action steps to the larger group discussion that will yield practical, helpful and engaging results.

#### Subcommittee on CLSA Convention 2024

Rationale: to lift the profile of the committee by offering resources helpful to fellow canonists for inclusion in the Convention Guidebook and engaging colleagues in conversation around various aspects of religious law during one of the breakfast gatherings.

#### Subcommittee on Proposals for Future Convention Presentation Topics.

Rationale: to investigate and formulate two (2) topics to propose to the Convention Planning Committee for presentation at the 2026 and 2027 CLSA Conventions.

#### Subcommittee on Proposals for Webinars.

Rationale: Webinars can be built upon an array of topics and would be an easily accessible and meaningful resource to a wide audience that could include canonists (both members and non-members), vicars for religious/episcopal delegates of consecrated life, and members of religious institutes, especially but not limited to leadership teams. We are looking to provide two (2) webinars annually. As with topics for future convention presentations, the Committee is looking to involve some “new” voices, both from within and outside the Committee, to be willing to share their expertise in these webinars.

The committee has agreed on two convention topics and presenters, to be forwarded to the Convention Planning Committee. In both convention presentations and webinars, there is an effort to involve “new” voices to share from their canonical experience and expertise.

**Submitted By:** Sr. Mariette Moan, ASCJ JCL  
May 27, 2024

**Committee:** Laity

**Constituted:** 2009

**Mandate:** The mandate of the committee is as follows:

1. To initiate as needed any projects pertinent to the study of canon law pertaining to the life and ministry of lay persons or the implementation thereof, including, but not limited to, the following:
  - a. Lay ecclesial ministry;
  - b. Collaboration with clergy;
2. To oversee projects referred to the committee by the BOG;
3. To oversee its subcommittees working on projects concerning the laity, (and)
4. To collaborate with national organizations and other groups dealing with the role of the laity in the Church.

**Members:** Mary Gen Blittschau, chair, Evansville, Indiana (2026)  
Claire Breaux, Baton Rouge, Louisiana (2026)  
Gregory Caridi, Dallas, Texas (2024)  
Shannon Fossett, Saco, Maine (2024)  
Andrew Haskins, Halfmoon, New York (2025)  
Joseph McQuaide, Wilmington, Delaware (2025)  
Lori Peery, San Antonio, Texas (2024)

**BOG Liaison:** David Castronovo

## **REPORT**

Throughout the year, we met via the CLSA's GoToMeeting account to discuss the new endeavor which the BoG entrusted to us. Specifically, we are making plans for 2026 to have a pre-convention retreat for canon lawyers. Our meetings were productive with good discussion. Two entities have been contacted for possible sponsorship and provision of speakers, and we hope for a positive response which will provide good direction.

Emphasis on the importance of prayer and deepening our relationship with the Lord especially in the midst of challenges are focal points for this retreat. Members have a strong desire to get to know one another better so as to enhance spiritual support and camaraderie in addition to serving as canonical resources for each other.

As we continue to prepare for this retreat, we ask for your prayers and hope that you will participate in this opportunity for faith development in canonical ministry.

**Submitted By:** Mary Gen Blittschau  
June 20, 2024

**Committee:** Publications Advisory Board

**Constituted:** Board of Governors (2007)

**Mandate:** It is the function of the Committee on the Publications Advisory Board:

1. To advise the BOG about all aspects of current, periodic and proposed CLSA publication projects, including financial, literary, educational and marketing issues;
2. To monitor the progress of all CLSA publication projects;
3. To implement the procedures for peer review of CLSA publications;
4. To make the final recommendation to the Board of Governors regarding specific publications.
5. To review the coordination and management of the CLSA's publications activity on the part of the Office of the Executive Coordinator; (and)
6. To provide a written report to the CLSA membership at the annual convention.

**Members:** Monsignor Michael Souckar, chair, Coral Springs, Florida (2025)  
Father Christopher Brashears, Oklahoma City, Oklahoma (2025)  
Father Phillip Brown, P.S.S., Baltimore, Maryland (2024)  
Monsignor Jason Gray, Peoria Heights, Illinois (2025)  
Monsignor Patrick Lagges, Merrillville, Indiana (2024)  
Dr. Sarah Lauhead, Cheyenne, Wyoming (2024)  
Mrs. Kelly Littleton, Portland, Oregon (2026)  
Monsignor Bruce Miller, Covington, Louisiana (*ex officio*) (2026)  
Mrs. Donna Miller, The Villages, Florida (*ex officio*)  
Father Peter Mottola, Rochester, New York (2026)

**BOG Liaison:** Mr. Benedict Nguyen

## REPORT

Since the last convention report, the Committee of the Publications Advisory Board (PAB) has met several times, both online and in person.

1. The PAB is monitoring the progress of the following publications:
  - *Code of Canons of the Eastern Churches* (Second Printing). The necessary permissions from the U.S. Eparchial Bishops and the Holy See have been secured. The text will include Predicate Evangelium, index, *fontes* and a table of corresponding canons from the Latin Code. It is hoped that this publication will be available by the end of 2024.
  - *CLSA Commentary*. This extensive project is making progress, albeit slowly. Since the last convention, Monsignor Ronny Jenkins, Dean of the School of Canon Law at The Catholic University, has agreed to serve as general editor. There also have been some changes among the content editors and authors who work directly with one another. The CLSA itself is the publisher of the new Commentary. While that eliminates a publisher's percentage of sales, it also significantly increases the "in house" editorial work, especially by the Executive Coordinator and General Secretary. The CLSA has contracted with a company for the formatting of the

Commentary, and some sections have already reached that final stage of preparation. Publication is estimated no earlier than Summer 2027.

- *Clergy Procedural Handbook*. This text is at the final stages of editing. The goal is to have the text to the peer reviewers by the end of the year. Absent any significant recommended changes, publication is anticipated in Spring 2025.
  - *Tribunal Procedural Handbook*. Father Dan Smilanic, co-editor of this project, died this year. That understandably has slowed down the project. Nevertheless, the text should be ready for peer review by the end of the year, with the hope of publication in early 2025.
  - The Dean of the Roman Rota approved the English translations of *Excerpta Argumentorum* from *Decisiones seu Sententiae* Vol. 107. These will be published in the 2024 edition of *Roman Replies and CLSA Advisory Opinions*.
  - The PAB reviewed a text of a history of the CLSA. The PAB recommended to the BOG to build upon this text for a fuller history, preferably written by a professional ecclesiastical historian, with the aim of publication for the Society's centennial. The PAB also recommended that the BOG pursue grants to fund this publication.
2. The PAB discussed several new publications that were submitted by the authors. These included original works and English translations of previously published texts. One of these proposed texts, on the topic of canonical delicts in the revised Book VI (cc. 1364-1399), was accepted for further review and discussion by the PAB.
  3. *Roman Replies and CLSA Advisory Opinions*
    - Work continues on the next compendium of *RRAO* for the years 2006-2024 and with an estimated 260 advisory opinions.
    - The PAB discussed the current state and future of *RRAO*. Because of the difficulties getting Roman replies for publication and identifying authors for advisory opinions, the PAB is considering:
      - i. Expanding the kind of articles that can be submitted.
      - ii. Re-establishing a subcommittee of the PAB to explore questions for advisory opinions, to recommend potential writers, and to review the submissions for editorial content.
  4. The PAB remains in contact with the Task Force For a Survey on Church Finances, as established by a resolution at the 2023 Convention. CLSA members are asked to encourage their diocesan finance officers to participate in the survey. It was agreed that the task force's deadline to submit its findings to the PAB will likely need to be postponed, perhaps to March 1, 2025. The BOG agreed to extend the deadline to May 31, 2025.
  5. At each meeting over the past year, the PAB has discussed the question of digital publications, beginning with the Code and then other CLSA publication. These conversations led to the following actions:
    - The PAB believes that, since the Code is already present online, the CLSA translation should be accessible, at least in a limited way. Web traffic should also be directed to other CLSA resources available for purchase.
    - The PAB recommended to the BOG to make the CLSA's text of the Code available free of charge on the CLSA website.

- The PAB entrusted to the Digital Publication Task Force (a subcommittee of the PAB) the question of developing a searchable digital version of the Code suitable for monetization. In addition, the task force should consider suitable means of making other CLSA resources digitally available.

Members are reminded that editions of CLSA *Proceedings* will soon be digitally available (following a one-year embargo) via HeinOnline.org.

6. The PAB encourages members to consider offering a webinar and/or to suggest topics for webinars by contacting Mrs. Donna Miller, Executive Coordinator.
7. The PAB slightly revised the Publication Protocol of the CLSA and requested the BOG's approval. The BOG approved the revision, and the updated protocol is on the CLSA website.

**Submitted by:** Msgr. Michael Souckar  
August 10, 2024

**Committee:** Research & Development

**Constituted:** 2008

**Mandate:** The mandate of the committee is:

1. To initiate or cooperate in all CLSA research projects such as seminars, symposia, and special studies.
2. To design and implement Think Tanks that will allow for diverse views on issues of ecclesial life having canonical implications.
3. To develop and recommend themes for the annual Conventions for submission to the Board of Governors for approval and subsequent referral to the Convention Planning Committee for implementation.
4. To maintain close communication with all the committees of the Society to facilitate needed research and discussion.
5. To interact with the Publications Advisory Board to assess the current and contemplated publications of the CLSA and offer suggestions and guidance for publication planning.

**Members:** Msgr. Bruce Miller, Chair, Covington, Louisiana, 2026  
Dr. Sara Paglialunga, Vicechair/Secretary, Fort Worth, Texas, 2024  
Rev. Brian Austin, Mableton, Georgia, 2025  
Mr. Vincent Gardiner, Cleveland, Ohio, 2024  
Dr. Sofia Markovich, Washington, District of Columbia, 2024  
Rev. Vincent Woo, Burlingame, California, 2025  
Msgr. Michael Souckar, PAB, Coral Springs, Florida

**BOG Liaison:** Rev. Patrick Cooney

**Standing Invitation:** Mr. Jay Conzemius, Convention Planning Committee, Bethel Park, PA

## REPORT

The CLSA R&D held meetings on April 5 and May 3, 2024. Members will begin future meetings soon, but scheduling will become more difficult since members have reported changes in employment responsibilities. The Chair will survey members to attempt to set future Zoom meetings.

The committee discussed proposals for Advisory Opinions, suggesting the development of practical guides for non-canonists on parish staffs, seminary and diaconate training, newly ordained priests, and new pastors. Members proposed publishing booklets or digital documents on the CLSA website on topics like sacramental record keeping, liturgical processes, permissions and dispensations, annulments, and parish councils. They also suggested creating training videos for canonists and convention speakers to share professional research with non-canonists.

The committee emphasized the need to monetize CLSA publications to generate significant income and compensate authors, noting the potential revenue from in-house publication of the new commentary. Members reviewed the BOG's suggestion and agreed to maintain communication with all Society committees to facilitate research proposals. The Chair offered creative services to all CLSA Committee Chairs, but there were no requests for assistance other than from the Publications Advisory Board.

Regarding Dicastery for the Doctrine of the Faith jurisprudence, the committee considered translating works by Dr. Claudio Papale from Italian, but also noted issues with the Urbaniana and the uncertain future of its publishing house. Publication is not foreseen.

The R&D extensively discussed future Convention speakers and topics and suggested waiting for the Synod's results before proceeding. Members considered Prof. Dr. Miriam Wijlens, JCD as a potential speaker due to her role in the Synod and history with the CLSA. Others from various viewpoints with the same experiences should be considered. They also discussed changes in formation programs for seminarians and the effects of the Synod on other church functions.

With about 20% of convention attendees being Spanish speaking, the committee suggested considering professors from Spain and other countries, debating the need for translators. They discussed financial constraints, speaker fees, and the possibility of renegotiating them. The logistics and politics of inviting speakers from Roman dicasteries were also considered, noting that some junior members of dicasteries might not be permitted to speak despite being proficient in English.

The committee members suggested peer reviews of speakers' draft presentations to ensure content quality and mentioned past translation issues. They considered new resources from the latest commentary authors. They agreed on the necessity of a comprehensive list of potential speakers and their fees, addressing common complaints about speech content, reworking the budget for speakers, finding translators, and implementing a policy for speech review.

Recognizing the difficulty in finding authors for Advisory Opinions, the committee encouraged all committees to offer questions for articles and suggested that committee members or other experts could serve as authors.

The committee also noted the ongoing need to publish studies in peer-reviewed journals, a function that *The Jurist* and other academic journals traditionally fulfilled. However, these articles appear less frequently published now. The committee urged the revival of more academic publications.

Members recommended convention seminars to address:

- 1) canonical procedures in matrimonial cases about the ground of prior bond;
- 2) the Pope's changes to laws and trial procedures for the Vatican State in its proper law;
- 3) the jurisprudence of the Signatura that clearly state members of a religious institute or society of apostolic life do not have an absolute right to use an advocate or procurator when dealing with a superior outside of actual trials or hierarchical recourse.

The committee has received a request from the Publications Advisory Committee recommend six topics and six speakers to the PAB by the October Convention for the development of future webinars.

**Submitted By:** Bruce Miller and Sara Paglialunga

**Committee:** Sacramental Law

**Constituted:** 2009

**Mandate:** The mandate of the committee is as follows:

1. To initiate as needed any projects pertinent to the study of canon law pertaining the sacramental life of the Church or the implementation thereof;
2. To oversee projects referred to the committee by the BOG;
3. To oversee its subcommittees working on projects concerning the sacramental life of the Church;
4. To offer suggestions to the BOG for marriage topics for pre-convention workshops; (and)
5. To collaborate with national organizations and other groups dealing with the sacramental life of the Church.

**Members:** Cecilia Brennan, Monterey, CA (2025)  
Ann Bryant, Houston, TX (2025)  
Gerardo Galaviz, Los Angeles, CA (2025)  
Tim Hedrick, New Orleans, LA (2025)  
Luis Capacetti, Raleigh, NC (2026)  
James Salamy, Syracuse, NY (2025)  
Leo Walsh, Anchorage-Juneau, AK (2025)  
Anthony Saiki, Kansas City, KS (2026)

**BOG Liaison:** Jeannine Marino, BOG, Washington, DC (2026)

## REPORT

The Sacramental Law Committee met via zoom on July 2, 2024. The committee reviewed the final draft of the second document in our Baptism series entitled “Theology of Baptism” laying out a basic theology of baptism within the context of the sacraments of initiation. We discussed the final wording keeping in mind the intended audience is parish staff who are not canonists.

We agreed the final draft is ready for review by the BOG and is submitted with this report. The next meeting is in September.

**Submitted By:** Cecilia Brennan  
July 2, 2024

## Document #1

### Valid Baptism Criteria

Valid conferral *solely* by means of:

- washing with true water and
- the required form of words

### Required Matter

True Water\_– (with nothing added)<sup>1</sup>

<sup>1</sup> J. HUELS, *Liturgy and Law*, Montreal, Wilson & LaFleur, 2006, pp. 191-192

*Water should be blessed except in case of necessity (c. 853)*

- tap water
- springs
- rivers
- wells
- lakes
- sea water
- cisterns
- rain
- melted snow, ice or hail
- mineral water
- dew
- condensation, etc.

Invalid: saliva, carbonated drinks, other liquids that are not clear, etc.

### **Required Form**

Method: (c. 854): 1) immersion or 2) infusion.

Since sprinkling does not convey the notion of washing, baptism by sprinkling is not permitted for Catholics. However, if for some reason this mistakenly occurs, it is still valid.

**Immersion** – For the valid reception of the sacrament, it is necessary that the water should physically touch the body in one of its principal members, generally the head or any part of the torso<sup>2</sup> (from the neck to the hip). (cf. RCIA, no. 226).

**Infusion/Pouring** – This entails pouring water over a principal part of the body (head, chest, back). If it only touches a minor part of the body, validity is doubtful.

The *RCIA* (n. 226) specifies the pouring is applied to the head.

The *Rite of Baptism for Children* (n. 21) indicates (in danger of death), the minister “pours water on the head of the child”.

Therefore, to avoid all doubt, water should be poured over the head.

Three-fold immersion in water is required for liceity but does not affect validity if only one immersion occurs.

Washing with water is essential to the sacrament, whereas the mode of washing is accidental to the sacrament.<sup>3</sup>

The same person must immerse or pour the water and pronounce the words simultaneously for validity.<sup>4</sup>

### **Required Trinitarian Formula**

Requires identification of the one doing the baptizing as well as the one being baptized.

“I baptize **you** in the name of the Father and of the Son and of the Holy Spirit”.

Note: “We baptize ...” has been determined to be invalid.<sup>5</sup>

<sup>2</sup> AMA definition.

<sup>3</sup> *Summa Theologica*, Pars III, Q. 66, art. 8.

<sup>4</sup> CONGREGATION FOR THE SACRAMENTS, *Acta Apostolica Sedis*, 8 (1916), PP. 478-480.

<sup>5</sup> CONGREGATION FOR THE DOCTRINE OF THE FAITH, Response to a *dubium*, 1 February 2009, in *Acta Apostolica Sedis*, 100 (2008), p. 200.

Modification of the formula may result in invalidity.<sup>6</sup>

### **Time**

Although baptism can be celebrated on any day of the week or year, it is nevertheless recommended that it be celebrated ordinarily on Sunday or, if possible, at the Easter Vigil. (c. 856).

### **Place**

Apart from a case of necessity, the proper place for baptism is a church or an oratory. (c. 857 §1). As a rule, and unless a just reason suggests otherwise, an adult is to be baptized in his or her proper parish church, and an infant in the proper parish church of the parents. (c. 857 §2).

### **Note:**

- According to cc. 846, 850 the minister is to follow the liturgical books approved for use in the United States.
- Videos or pictures as well as an affidavit can be used to provide proof if a certificate is impossible to locate. (See sample affidavits link).
- See partial listing indicating those Christian Churches that certainly have valid, invalid or doubtful baptism. (Input link to USCCB list if permitted or other).

## **Document #2**

### **Theology of Baptism**

#### **Sacraments of Initiation**

The three Sacraments of Initiation are Baptism, Confirmation, and the Most Holy Eucharist. These three Sacraments lay the foundation for a Christian life (cf. CCC 1212). They “are interrelated in such a way that they are required for full Christian initiation” (c. 842 §2).

Baptism and Confirmation impart an indelible mark that is permanent, cannot be taken away and therefore, cannot be repeated (cf. c. 845 §1).

#### **Baptism - an Introduction**

The Sacrament of Baptism must be received first before any other Sacrament (c. 842 §1). Baptism is the “gateway to the sacraments” (c.849). It is the “door which gives access to the other sacraments” (CCC 1213).

“Baptism ... is validly conferred only by a washing of true water with the proper form of words” (c. 849). It is through the washing with water that the baptized are cleansed from sin and reborn as children of God. This is the spiritual rebirth that Jesus speaks about with Nicodemus (cf. John 3:5).

The Sacrament of Baptism has several effects (cf. canon 849), including:

<https://www.vaticannews.va/en/vatican-city/news/2020-08/cdf-baptisms-with-arbitrarily-modified-formulas-are-not-valid.html>

<sup>6</sup> <https://www.vaticannews.va/en/vatican-city/news/2020-08/cdf-baptisms-with-arbitrarily-modified-formulas-are-not-valid.html>

1. Forgiveness of Sin - Through Baptism the baptized are freed from sin, whether it is sin that is committed (personal sin), or original sin that is inherited by all persons. The Nicene Creed professes, “one baptism for the forgiveness of sins.”
2. Children of God – Through Baptism, we are reborn as children of God, and are configured to Christ. The baptized are called to be like Christ; to follow His example and His teachings, which are recorded in Sacred Scripture.
3. Members of the Church - Through the Sacrament of Baptism, the baptized are incorporated into the Church founded by Christ. The baptized person, now a member of the Christian Faithful, acquires certain rights and obligations.

If a question arises about whether the Sacrament of Baptism was actually or validly celebrated a diligent inquiry must be carried out. If after completing a diligent inquiry a prudent doubt still exists whether baptism was actually or validly conferred, then it can be conferred conditionally (cf. c. 845 §2).

**Committee:** Task Force on Church Finance

**Constituted:** 2024

**Mandate:** The mandate of the committee is as follows:

1. To design and implement a survey to assist in raising topics that could be used to produce new publications, workshops and/or other initiatives to provide education and practical resources of best practices in the area of church finance.
2. To determine who best to survey.
3. To determine the survey methodology (online/paper) and distribute the survey.
4. To analyze the survey response, prepare a report of the findings and offer recommendations to the PAB on new or updated publications and initiatives.
5. To submit the report to the PAB no later than May 31, 2024. The Board of Governors may extend this deadline to October, 2024.

**Members:** Ms. Mary Santi, Blaine Washington  
Rev. Phillip Brown, PSS, Baltimore Maryland  
Dr. Barbara Anne Cusack, Greenfield Wisconsin  
Mr. Christopher Fusco, Esq. Piscataway, New Jersey  
Deacon Matthew Glover, Little Rock, Arkansas  
Monsignor William King, Washington, District of Columbia.

**BOG Liaison:** Donna Miller, Executive Coordinator, CLSA

## **REPORT**

The Task Force was convened at the end of April, 2024 and has held two meetings via Zoom. Members have reached out to executive leadership of various religious organizations including the Diocesan Fiscal Management Conference, the National Association of Church Personnel Administrators, and the Resource Center for Religious Institutes. We are exploring other organizations with whom we might partner. We have decided that the survey will first be administered to CLSA members. The BOG has extended the Task Force deadline to May, 2025. We are in the process of developing survey topics and having our next meeting scheduled in September, 2024. We have requested time at the convention for one of the task force members to make a brief presentation regarding the survey.

**Submitted By:** Mary E. Santi  
August 10, 2024

## AD HOC COMMITTEES

**Committee:** Strategic Visioning Task Force

**Constituted:** CLSA Resolution - 84th Annual Convention, Cleveland, OH - October 12, 2022

**Mandate:** The mandate of the Task Force is as follows:

1. As a result of the audit by done in 2022 by John Schlageter (of the JKT Group) and the Future Initiative Project completed in 2007, the Task Force is to undertake a strategic planning process to understand how the Board of Governors, committees, and staff function today in their present roles, and to recommend ways forward to prepare to meet future needs and challenges. This will begin after the 2022 Convention and end with a report and recommendations presented to the membership at the 2024 Convention.
2. Because the mandate of the Task Force will focus on the work of the Board and staff, and how they interact with committees of the Society, most members of the Task Force should have prior experience on the Board of Governors.
3. The *ad hoc* Task Force will study the Constitution and Bylaws of the CLSA, the Future Initiatives Project, and John Schlageter's audit report. In addition, the Task Force will conduct listening sessions at the 2023 Convention, in virtual meetings, and at other gatherings, as possible.

**Members:** Very Rev. Paul D. Counce, chair, Baton Rouge, Louisiana (2024)  
Dr. Lynda Robitaille, vice-chair, Vancouver, British Columbia (2024)  
Ms. Barbara A. Bettwy, Harrisburg, Pennsylvania (2024)  
Ms. Mary Gen Blittschau, secretary, Evansville, Indiana (2024)  
Rev. Anthony R. Dill, Harrisburg, Pennsylvania (2024)  
Dcn. Matthew A. Glover, Little Rock, Arkansas (2024)  
Msgr. D. Bruce Miller, Covington, Louisiana (2024)  
Very Rev. Kevin Niehoff, OP, Grand Rapids, Michigan (2024)

**BOG Liaisons:** Rev. John P. Donovan  
Very Rev. Jamin S. David

### REPORT

The Strategic Visioning Task Force has already turned in its final report and will be following up on it by working with the Resolutions Committee on the wordings of their proposed resolutions.

**FINAL REPORT**

**Canon Law Society of America  
Strategic Visioning Task Force**

**JUNE 10, 2024**

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## I. INTRODUCTION

At the 2022 Convention of the Canon Law Society of America (“CLSA” or “Society”) in Cleveland, a resolution was passed that mandated a two-year Strategic Visioning Task Force (the “Task Force”) “to undertake a strategic planning process” with two named goals:

1. To understand how the [CLSA] Board of Governors, committees, and staff function today in their present roles; and
2. To recommend ways forward to prepare to meet future needs and challenges.

The Task Force now offers this Final Report to the CLSA membership to prepare for the 2024 Convention.

This report begins with the end in mind, by outlining the Task Force’s recommendations on ways to meet future needs and challenges, as well as several proposed resolutions (some of which are admittedly bold and would be paradigm-shifting for the Society). The report then describes the Task Force’s efforts to understand how the Board of Governors (“BOG”), committees, and staff function in their present roles—much of which served as a foundation for our recommendations on future visioning. The report also has several appendices for added context and background information, including an explanation of our methods.

## II. RECOMMENDED WAYS FORWARD TO PREPARE FOR FUTURE NEEDS AND CHALLENGES

From the surveys and listening sessions the Task Force conducted, the membership enthusiastically expressed the desire to continue the purpose of the CLSA as outlined in its constitution, Article II:

The purpose of this Society shall be:

1. To promote the pastoral ministry of the Church.
2. To cooperate in the continuous revision and renewal of the universal law of the Church and with the United States Conference of Catholic Bishops in proposing new legislation, resolving current legal questions, and implementing laws and structures which pertain to the vital life of the Church.
3. To encourage and participate in canonical research and study toward a constant renewal of canon law.
4. To respond to the practical canonical needs of all the people of God in the respective capacities in which they serve and benefit from the Church.
5. To facilitate the interchange of canonical ideas, practices and decisions among canon lawyers, and other members of the Society.
6. To cooperate with individuals and organizations doing research in other sacred sciences for the promotion of mutual interests.
7. To establish a dialogue and share ideas, proposals, and insights, with other canon law societies in the world.

## A. Strengths of the CLSA

From the surveys and listening sessions the Task Force conducted, four areas received the most positive comments about the strengths of the CLSA. The most often mentioned was (1) the value of networking (for some, this was the primary reason they chose to continue their membership). The other key strengths included: (2) the opportunity for ongoing education at the annual convention; (3) the excellent publications; and (4) the professionalism shown in the work of the Society.

There was consensus on these strengths. The Task Force believes the Society should continue to increase and augment each area, and that these strengths should continue to guide the Society's vision moving forward.

## B. Desires of the CLSA's Membership

Many issues and concerns were expressed regarding the challenges facing the Society. From the listening sessions and surveys, the Task Force identified these desires that underlie most of these expressed concerns. These should serve as guiding principles for the future deliberations of the Society.

- 1. More Opportunities for Networking.** Networking is highly valued by Society members. There was much interest in finding ways to increase the opportunities for members to meet each other.
- 2. Increased Transparency and Communication.** There is a general sentiment that the membership is unaware of the internal working of the Society, especially of the BOG and staff. The work of the BOG, staff, and committees is not widely understood by the membership. Recent attempts at improving transparency (such as opening the nominations for the Role of Law awardee) should be continued.

The BOG should find ways of improving its own transparency and accountability to the membership in the decisions it makes and explaining its reasoning behind its decisions. This includes, but is not limited to, better communication regarding the myriad copyright issues that the Society must routinely navigate. (See Resolution #1 below)

The membership also bears responsibility to continue to foster its own responsibility regarding issues related to intellectual property and plagiarism (which is an ever-increasing issue noticed in some seminar presentations and proposed publications). The growing use of AI offers many opportunities, but also new risks and challenges.

Finally, all members (not only the BOG and staff) must be cognizant of the international scope of the Society's membership, which brings into play differing privacy laws that must be respected for differing parts of the world.

- 3. Better-Functioning Committees.** Since much of the work of the Society is done through its committees, the CLSA needs to facilitate more transparency and accountability to the membership. (See Resolution #1 below)

- 4. More Diversity and Involvement of More Members.** The membership has changed from being a predominantly clergy-dominated Society to now including more laity, comprising a more diverse cross-section of women and men from a variety of cultural and ethnic backgrounds. However, this change is not perceived to be reflected (or, in fact is *not* reflected) in the leadership of the Society. There was consensus that more effort needs to be made in addressing this.

Additionally, the Task Force recommends that the Society broaden its net for new seminar and webinar speakers. New recipients of JCDs could present their research as a seminar or webinar. Recipients of a CLSA scholarship and recent JCL graduates could present webinars on their most recent studies. The Society should look to broaden backgrounds and perspectives in finding new presenters in the years to come.

- 5. Better Integration of New Members.** The future of the CLSA depends on involving new members in all aspects of the Society. There should be a concerted effort to include new members on committees and task forces and provide opportunities for them to take ownership of the mission of the Society.

- 6. A More Open Process for Nominations.** There were many comments about the current nomination process for positions on the BOG. The process was seen as too insular, with too few people choosing upcoming leaders, and with too much secrecy surrounding who was nominated and when those decisions were finalized. The nomination process needs to be opened so more members have a voice in choosing nominees.

- 7. Improved Electronic Media (Especially Website and Database).** The value of having easily accessed electronic media was often expressed. Members appreciate tremendously the work involved in creating the database along with numerous updates. Concern was expressed, though, that the current website and database of canonical resources are unresponsive to the needs of members. Improvements to these areas will be expensive, but members generally believed these improvements would be worth it in the long run.

Income from publications is a major source of funding for the CLSA and its operations. Without publications, the CLSA operates at a deficit. The Task Force recommends that the Society embrace digital publications and printing on demand, rather than continue to rely so heavily on printed publications.

Most members write as volunteers. Copyrights of CLSA publications belong to the CLSA, with the exception of the *Code of Canon Law: Latin English Edition. New English Translation* (Fourth Printing), to which the USCCB holds copyright to the compilation. The Holy See retains copyright to the original Latin text and the CLSA retains derivative copyright over its English translation of the code. The Society now competes with those who can self-publish and receive direct proceeds. What the Society offers that differs are materials that are peer-reviewed and reference-checked.

As an alternative to the CLSA maintaining its own database (which consumes both human and financial resources), the Society should explore contracting with already-existing canonical databases to provide membership with access to select databases maintained by other entities or that are typically restricted to students. Although this

would likely require payments for contracts, it would reduce the cost of updating and maintaining the Society's database.

- 8. Lower Costs for Members.** Although the members expressed a desire for more and better digital resources, there was a call for the Society to lower the costs of both membership dues and convention attendance. This is especially an issue for those members whose fees are not paid by a diocese, religious institute, or other resource. For example, much interest was expressed in developing a new "emeritus" membership category. (See Resolution #5 below)

Dues do not cover all expenses of the CLSA. We must strive to be good stewards. Significant cuts already taken have been helpful (e.g., reducing BOG and committee travel, establishing travel policies, and establishing stricter spending protocols), but inflation has affected everyone. The BOG has been, and should continue to, explore ways to decrease costs. Creative ideas must be generated to do this so that the Society's bottom line is not gravely affected, which could include finding sponsors.

The Task Force has heard concerns from the membership regarding the convention costs. Convention costs cannot be completely covered by registration fees. Serious efforts have been made to reduce the costs of the convention, and the BOG should continue in those efforts. Sponsorships could reduce costs. The reality of budgetary concerns often precludes what members may desire (for example, food and alcohol expenditures reduce the room rates at the hotel for paying convention attendees).

- 9. Increased Focus on Spiritual Dimension for Canonists.** There was an awareness that the demands of canonical work require a well-formed spiritual foundation. The Society should nurture this spiritual dimension, both at the conventions and beyond.

- 10. Closer Collaboration with USCCB, Especially its Canonical Affairs & Church Governance Committee.** This was a consistent refrain of feedback from the listening sessions and surveys. However, the Task Force recognizes that the Society does not control whether the USCCB seeks its input or involvement. The Task Force recommends that the BOG explore opportunities to make itself available to the USCCB on specific projects that might be of interest.

### **C. Proposed Resolutions**

In addition to other general recommendations throughout this report, the Task Force is proposing six (6) specific resolutions intended to address some of the more prominent and consistent concerns expressed by the membership.

- 1. Be it resolved that all minutes and relevant handouts of meetings of the Board of Governors, committees, task forces, and subcommittees be posted on the CLSA website for all members to view, according to the accepted CLSA protocol and in conformity with civil laws. (See II.B.2 and .3 above)**
- 2. Be it resolved that the Chairs of the six standing committees be elected to these positions by the membership. These elected Chairs would simultaneously serve as**

**Consultors on the BOG. The details of this change are to be designed and implemented by the BOG over a 3-year period until in place. (See III.F below)**

- 3. Be it resolved that the “Research and Development” committee be eliminated, its duties then subsumed into the “Publications Advisory Board” and the “Convention Planning” committee. The details of this change would be designed and implemented by the BOG over a 3-year period. (See III.F below)**
- 4. Be it resolved that the Nominations Committee be renamed as the Elections committee and that the new procedures recommended in III.H be implemented. (See III.H below)**
- 5. Be it resolved that the BOG develop a new “emeritus” membership category, the details of which must be presented for a resolution at the Convention in October 2025. (See II.B.8 above)**
- 6. Be it resolved that the CLSA appoint a “Constitutional Task Force,” whose mandate would be (after study and consultation as necessary) to incorporate the resolutions voted on at this assembly to draft and propose by one or more resolutions a new and revised Constitution—and, if needed or desired, corresponding By-Laws. The “Constitutional Task Force” would consist of three to four members (one of whom should be a civil attorney), complete its work over a 2-year period, and propose its revisions at the 2026 Convention.**

### **III. UNDERSTANDING THE BOG, COMMITTEES, AND STAFF AND RECOMMENDATIONS FOR FUTURE CHANGES IN THEIR FUNCTIONING**

Based on the feedback received and its own study of the issues, the Task Force concluded that the Society would benefit from adding or enhancing the following regarding the BOG, committees, and staff:

- Improved orientation for all members regarding roles of BOG members (highlighting the roles of President and Vice President) and CLSA staff and their job descriptions. (See III.F and G below)
- Better clarity on the role of Consultor (See III.F and H below).
- For the role of Treasurer, explicitly require financial knowledge and experience. (See III.E below)
- Clarity and transparency in the nomination process to run for the BOG (See III.H below).
- Clearer requirements to be eligible to be elected (*e.g.*, a letter of suitability; acknowledgement that the person will need time away from the diocese/ministry; being a member of the CLSA in good standing). (See III.H below)

## **A. Role of the President**

The President of the Society is typically elected by the membership as Vice-President/President-elect. The individual serves for a total of three years. The responsibilities of the President are defined in the By-Laws and Article VII of the Constitution, and include:

[T]o appoint, with the approval of the Board of Governors, a General Chairperson and a Press Officer for the Annual General Meeting, to offer, or provide for the offering of a Mass for the living and deceased members of the Society on the occasion of the Annual General Meeting, to select the time and place of the Annual Plenary Meeting of the Board of Governors and to extend invitations to all persons eligible to attend the meetings of the Board, to preside at all the meetings of the Board of Governors, as well as at general meetings of the Society, and to, in general, supervise the business and affairs of the Society, and perform all duties incident to the office of President.

As for the President's term length, the general sense from the various listening sessions was in favor of extending it to longer than one year. In addition, 92% of recent BOG members surveyed indicated the term should be longer than one year. However, in a poll of the CLSA staff, none recommended a longer term.

A two-year or three-year term for the President would require a paradigm shift in the understanding of the position and its responsibilities (Is the President elected first as Vice-President/President-Elect? If so, how long would the person's term be? If not, what would be the role of the Vice-President? Etc.). There are reasons for and against this change. The data from the surveys and listening sessions suggest there is membership support for making this change. However, after further study and consultation, the Task Force recommends that this change would be impractical and inadvisable, largely due to the commitment of time, energy, and resources it would require of an individual who is still in full time work or ministry. Striking that balance may be achievable for the present three-year term of Vice-President / President / Past President, but it is probably not sustainable for most members beyond that.

## **B. Role of the Vice-President**

The Vice-President serves as President-elect, with duties as defined in Article VII of the Constitution. The responsibilities of the Vice-President include "the supervision and coordination of all committees of the Society in the name of the Board of Governors, and the regular reporting of the progress of each to the Board of Governors." In addition, the Vice-President has any responsibilities assigned to the office by the President. The individual serves the Society for three years total (including one year as Immediate Past President).

As for the length of the Vice-President's term, 62% of the recent BOG members surveyed indicated the Vice-Presidential term should be longer than one year. As with the length of term for the President, a two-year or three-year term for the Vice-President would require a paradigm shift in the understanding of the position and the responsibilities. A longer term would probably not include serving as President-Elect. There were sufficient responses from the BOG and Committee Chairs to support review of not only the term length of the Vice-President position, but also responsibilities associated with the office, and the removal of "President-elect" from the

office as currently envisioned. However, for the same reasons as stated vis-à-vis the President, the Task Force does not recommend a change to the length of term for the Vice-President.

The Society might benefit from thinking through the current role versus making changes, particularly if the suggested resolution regarding future consultants being chairs of the standing committees passes, the responsibilities of the Vice-President may need to be re-evaluated.

### **C. Role of the Past President**

The only mention of the Past President is in Article VII of the Constitution, which states that “the immediate Past President’s term shall extend for the entire time that his or her successor as President is in office.”

The BOG members did not demonstrate strong support for the Past President to remain on the BOG (25%). The same number (25%) indicated the Past President should be removed from the BOG. There is more support (31%) for developing a mix of the Past President remaining on the BOG and developing a resource group of several Past Presidents to be available to the Society for consultation.

The Task Force believes the Society ought not discount the importance of the institutional memory present in the Past Presidential office to the BOG. There would be a benefit to rethinking this office if the Society moved to a three-year Presidential term and staggering elections of the Vice-President, Secretary, and Treasurer to ensure institutional memory is an available resource.

### **D. Role of the Secretary**

The Secretary’s role is to “keep the minutes of the general meeting of the Society and the meetings of the Board of Governors,” and other duties as assigned by the President and BOG.

The Task Force recommends no changes to this role.

### **E. Role of the Treasurer**

The Treasurer’s role is to “perform all the duties incident to the office of Treasurer” and any other duties as assigned by the President and BOG.

The Task Force recommends no changes to this role, although some noted that it is essential that the treasurer be a canonist with a background in financial matters.

### **F. Role of the Consultants**

The Task Force recommends that the role of the at-large Consultants be significantly strengthened and augmented in the following way: those who are elected as Chair of one of the standing committees are also by that very fact elected as Consultants. The result would be that the Society at large is voting not only for a Consultant, but also on who would Chair each standing

committee. The individual elected would then serve a 3-year term as both Consultor and Chair of that standing committee. (See Resolution #2 above)

There are currently six at-large Consultor positions, and seven standing committees. The Task Force recommends that the “Research and Development” committee be eliminated, and its duties then subsumed into the Publications Advisory Board and the Convention Planning Committee, leaving six standing committees. (See Resolution #3 above)

This change could be implemented by the BOG in a staggered manner.

It is the Task Force’s hope that this would shift the work of the committees from being “maintenance-oriented” to being “mission-oriented,” insofar as an elected Chair/Consultor would also run on a platform of aspirational goals for the work being done by that specific committee, and that person would have 3 years to meet those goals. Thus, the committees could, over time, become oriented more towards specific projects that seek to fulfill specific goals.

## **G. Roles of Staff**

There are three paid staff positions: Executive Coordinator, General Secretary, and Membership Coordinator. Their respective roles and responsibilities can be found in Appendix A. Two are full-time, and one is three-quarter-time. The two full-time people work in the CLSA office in Washington, DC. All regularly work beyond a forty-hour week. Their roles are clearly delineated, yet they assist each other regularly. Their roles are not clearly understood by membership or even members of the BOG.

Regarding challenges for the staff, the Task Force understands that the DC market is increasingly expensive both for the staff (who can rarely be paid comparable rates for their positions in other sectors) and for rent of office space. Because most of the membership are employed or ministering full-time elsewhere, more work is often placed on the staff. Staff members have their own assigned responsibilities, not all of which make them available to address the wants or needs of committees or the membership.

Based on the feedback received, the Task Force recommends thoughtful consideration of change in these areas:

- New titles of staff roles to better reflect the reality of their positions and better communicate their roles to the membership.
- Improve membership’s and BOG’s understanding of staffs’ roles.
- Better communication and working relationships with committees.
- Stronger mandate to complete tasks without input from the BOG.
- Better BOG responsibility for tasks which it should do, rather than staff.

## H. Roles of Committees

There are four “Constitutional Committees” and seven “Standing Committees.”

The Constitutional Committees are:

1. Nominations
2. Resolutions
3. Resource and Asset Management
4. Professional Responsibility

The Standing Committees are:

1. Clergy
2. Convention Planning
3. Eastern Churches
4. Institutes of Consecrated Life and Societies of Apostolic Life
5. Laity
6. Publications Advisory Board
7. Research and Development

As explained in the section on “Role of the Consultors (III.F),” the Task Force recommends that the Chairs of the Standing Committees be elected (except for the “Research and Development Committee,” which should be eliminated), and that those Committee Chairs also then serve as one of the six Consultors. (See Resolutions #2 and #3 above)

Regarding all committees, the Task Force notes that one of the overriding concerns expressed throughout this process has been the perceived micromanagement of the committees by the BOG. Micromanagement may have little or no structural solution. If Chairs were also *ex officio* Consultors, that this will result in more direct overlap with the BOG. However, it would also give the membership more direct input on who would serve as committee Chairs. It would eliminate the need for a BOG liaison to the committees (which has tended to create at least the impression of micromanaging). Giving the Consultors the role of Committee Chair has the potential to create better synergy between and among the committees, as the Chairs would also work together on the BOG. This would also create a built-in structure to aid the Vice-President in his/her role of supervising and coordinating the committees. (See Resolution #2 above)

As for the “Nominations Committee,” the Task Force recommends:

- Changing the name to the “Elections Committee.”
- Increasing transparency regarding the nominations process.
- Minimizing the secrecy that often accompanies asking and being asked to run for office.
- Increasing the number of voting members of the committee to 5-7.
- Requiring certain assertions before a person is eligible to be elected (e.g., a letter of suitability; acknowledgement that the person will need time away from the diocese/ministry; being a member of the CLSA in good standing).
- Avoiding only nominating two people for election for a position. (See Resolution #4 above)

The Task Force also recommends increased transparency with the membership by publishing information on the website and in other places regarding:

- Mandates of each committee
- Chairs and members of each committee
- A summary of the committee meeting minutes, to the extent permitted by civil laws
- Current projects and their progress (See introduction to III above)

Finally, the Task Force recognizes there may be interest in creating new committee-run projects, which might include but not be limited to:

- Fundraising and financial development
- Strategic visioning successor
- Synodality and canon law
- Penal law
- Parish/Diocesan councils and governance
- Membership growth and retention
- Outreach to potential authors/presenters

As a general rule, the Strategic Visioning Task Force supports the idea recommended in the listening sessions that the work of the Society more and more be structured as “project-oriented,” such that task forces can be named to complete a specific project; once they complete their work, they then “sunset” out of existence. Even within committees, such an approach may favor more productive work and lessen the frustration of endless brainstorming.

#### **IV. CONCLUSION**

As members of the Canon Law Society of America, the Strategic Visioning Task Force recognizes that the Society is better off moving into the future by doing so purposefully. Changing demographics, resources, situations, and priorities are realities that face all of humanity, not just the Catholic Church, her institutions, and her members.

We will be a Society that is both old and young, with members inevitably “aging out” even as new canonists join. While academic scholarship will still be prized, experiential wisdom will likely be similarly valued in the years ahead. We will continue to have more lay members, and fewer clergy. We will continue to be an overworked band of colleagues, dedicated to more than one job at work, at home, and in Church. And yet we must maintain clear, exacting standards of care in providing our necessary canonical counsel, even as this becomes more expensive, time-consuming, and yes, underappreciated.

From all the input we heard and studied, it was reassuring for us to realize how much canonists respect each other and the quality of work we all do. Scripture scholars, preachers, and moralists may capture headlines, but we can be proud that in studying the law, implementing it properly, and even suggesting improvements in it occasionally, we perform a most valuable service to the Church. Saving souls, after all, remains our chief priority as disciples.

That does not make strategizing for the future easier. Changes to various structures and operations may demand not just creativity but patience. Not everything will be as achievable or affordable as we might like, but during the past 85 years our Society has thrived. We have benefited from the advantage of depending on each other for good-willed assistance and leadership. Thank you for helping us so far, and for continuing to do so in the days and years ahead. Saint Raymond of Peñafort, pray for us!

Rev. Paul Counce, Co-Chair  
Dr. Lynda Robitaille, Co-Chair  
Ms. Barbara Bettwy  
Ms. Mary Gen Blittschau  
Rev. Anthony Dill  
Deacon Matt Glover  
Msgr. Bruce Miller  
Rev. Kevin Niehoff, OP

BOG members as liaisons to the Task Force:  
Rev. Jamin David  
Rev. John Donovan

## APPENDIX A - STAFF ROLES

### **Executive Coordinator:**

The Executive Coordinator is an authorized agent for the Canon Law Society of America (CLSA) in all matters for which such agency is required unless the Board of Governors or officers of the Society determine otherwise in particular cases.

#### Duties and Responsibilities

1. Implements the decisions of the Board of Governors (BOG).
2. Participates in meetings of the BOG and serves ex officio as a member of the Convention Planning Committee and the Publications Advisory Board.
  - a. Establishing deadlines throughout the year, e.g., publications, publication advertising and solicitation of research, translators, etc.
  - b. Collecting, editing, producing annual publication of Roman Replies and CLSA Advisory Opinions and Proceedings.
  - c. Recommending reprints, updates or new editions of existing publications/ reports or disposition of current publications/reports; serving as editor for committee-produced publications.
  - d. Researching, vetting, reviewing contract terms and managing outside editorial or production contractors.
  - e. Managing copyrights, permissions and licensing, including periodic environmental scans for infringements; working with legal consultant on any related claims and reporting such to Board.
  - f. Monitoring monthly inventory from Logistech (forwarding monthly reports to the Accountant).
  - g. Collaborates with the General Secretary so that materials are properly and promptly prepared by staff for publication and distribution.
3. Manages all aspects CLSA's digital publishing program including:
  - a. Production and dissemination of regular podcasts and webinars, including vetting/soliciting presenters, recording and editing, hosting, and marketing.
  - b. Managing all aspects of Amazon web store, including oversight of titles for sale and creating Amazon-ready on-demand files.
4. Serves as a liaison between the CLSA and the staff of the USCCB, the USCCB Committee for Canonical Affairs and Church Governance, other professional societies within the Church, and other groups designated by the President or BOG.
5. Communicates to the President requests for CLSA members to assist with projects, seminars and the like on behalf of the Society.

### **General Secretary:**

The General Secretary manages and is responsible for the day-to-day operations of the Office of the Canon Law Society of America (CLSA) in Washington, DC, like the General Secretary of the USCCB.

The General Secretary is an authorized agent for the CLSA in all matters for which such agency is required unless the Board of Governors or officers of the Society have determined otherwise.

The General Secretary is authorized to finalize contracts for facilities and make other legal arrangements for the Annual General Meetings on behalf of the Society after consulting with the National Convention Chairperson and the President.

#### Duties and Responsibilities

1. Implements the decisions of the Board of Governors (BOG).
2. Participates in meetings of the BOG and serves ex officio as a member of the Convention Planning Committee.
3. Manages the Office of the CLSA, directing and supervising the work of the Administrative Assistant and other staff. Collaborates with the Executive Coordinator so that materials are properly and promptly prepared by staff for publication.
4. Working with the Treasurer, manages the day-to-day business operations of the CLSA, and is responsible for the financial operation of the CLSA including:
  - a. The collection and disbursement of all funds of the CLSA. Depositing receipts, paying bills, reconciling monthly financial statements, and maintaining contact with the auditor/accountant as needed;
  - b. Maintaining contracts for the employee health benefit package, the payroll service, and an IT consultant;
  - c. Sending notice to those active and associate members who become delinquent in the payment of their dues;
  - d. Depositing in the name of, and to the credit of, the CLSA all monies and other valuables of the CLSA in banks and trust companies or the like approved by the BOG;
  - e. Oversees the accountant or other responsible personnel in keeping the accounts of the CLSA in books designated for that purpose, specifically monies received and expenses incurred in connection with the General Meeting.
5. Ensures that the CLSA Office:
  - a. Keeps a current list of the names and addresses of the active, associate, student and honorary members of the CLSA, which shall be made available upon request to any member, at the latter's expense, provided the use of the list be for the purpose of the CLSA;
  - b. Maintains the files of the CLSA on a current basis and serves as liaison with the archives of the CLSA;
  - c. Sees to it that notice of the Annual General Meeting is sent to the membership.
6. Establishes deadlines throughout the year, e.g., newsletter preparation, convention tasks, website updates, mailings, etc.
7. Coordinates the logistics, makes arrangements for and attends to the details related to the annual convention and meetings of the BOG, including hotel accommodations, preparations and the dissemination of meeting materials.
8. Collects, prepares, reviews, edits and disseminates content for the Newsletter, announcements, brochures, mailings, and BOG materials.
9. Responsible for maintaining the CLSA website, including:
  - a. Keeping the website updated, e.g., dates for regional meetings, seminars, conventions, and sister societies and non-CLSA conferences; lists of committee members; CLSA officers; obituary notices for deceased members; episcopal appointments of members;
  - b. Assisting members with problems logging in, paying dues, registering for events, purchasing or downloading publications;

- c. Reviewing and forwarding or responding, as appropriate, to website contact forms.
- 10. Coordinates the public relations for the Society at the direction of the President or BOG.
- 11. Communicates to the President requests for CLSA members to assist with projects, evaluations, surveys, seminars and the like on behalf of the CLSA.

**Membership Coordinator:**

The Membership Coordinator provides a full range of customer-focused support to CLSA members, Board, staff, and consultants in addition to providing administrative support to the General Secretary. The Membership Coordinator demonstrates qualities of organization, knowledge, and effectiveness in all work interactions. The Membership Coordinator is expected to maintain confidentiality in all matters.

**Duties and Responsibilities**

1. Delivers professional-level of customer service to CLSA members including:
  - a. Answering phone calls, emails and website contact forms on a daily basis. All calls/emails are answered on the same day whenever possible or within one business day.
  - b. Processing all publications orders through fulfillment vendor or in-house shipping (includes phone orders, bulk purchases and returns). All orders are processed into Logistech before 2 p.m. each day.
  - c. Receiving and processing all member dues payments and scholarship donations. Scholarship letters are sent out at the beginning of Lent, and dues invoices are sent out in April each year. All payments are scanned to bank account within two business days of receipt.
  - d. Ensuring CLSA website is continually updated, including posting holiday announcements, updating information, creating publications and events, posting items and other required changes.
2. Creates materials for members including:
  - a. Producing a quarterly e-newsletter, using supplied text and additional information gathered related to new members, tributes, etc. as needed
  - b. Producing an annual registration mailer for the convention that is mailed each May
  - c. Producing materials for membership, conventions, or other events
  - d. Creating and formatting Varia for Proceedings
3. Provides administrative support to the General Secretary including:
  - a. Updating Board and committee materials in print and online as needed, ensuring proper permissions in online groups
  - b. Maintaining office equipment and supplies, advising General Secretary when items need to be ordered/repaired/updated
  - c. Creating correspondence as requested
  - d. Tracking royalties and requesting payments each quarter
  - e. Preparing monthly sales and inventory reports for accountant
  - f. Monitoring in-house and offsite publications inventory/library and advising of low-stock or reordering needs, including management of inbound shipments
  - g. Preparing and publishing manuscripts in Kindle Direct Publishing on Amazon
  - h. Managing ISBNs and copyrights for publications

- i. Monitoring scholarship applications, corresponding with applicants and preparing materials for committee
- j. Managing CLSA archive project, ensuring items are regularly submitted
- k. Conducting research and preparing reports as directed by General Secretary

## APPENDIX B - METHODOLOGY AND BUDGET

The Task Force’s work included (but was not limited to) the following:

- ◇ Two “In Person” meetings in Milwaukee at the October 2023 convention and in Baton Rouge in May 2024; ten virtual meetings of the full Task Force; and seven total virtual meetings of the Task Force’s two subcommittees.
- ◇ Review of the current CLSA *Constitution* and its *By-Laws* (as amended through 2023).
- ◇ Review of the 2007 *Future Initiatives Project*, which included the last revision of the standing committees of the CLSA.
- ◇ Review of the August 2022 report offered by Mr. John Schlageter of JKT Group at the request of the Board of Governors.
- ◇ Composition and analysis of a comprehensive “internet survey” of CLSA members and all other interested persons who wished to respond in early summer 2023.
- ◇ Five periodic reports to the Board of Governors and one report to the CLSA membership assembled at the 2023 Milwaukee convention.
- ◇ A broad consultative “Listening Lunch” at the 2023 Milwaukee convention, and smaller “Listening Sessions” at two subsequent regional meetings of canonists.
- ◇ Three smaller surveys in February/March 2024: one of present and past members of the Board of Governors who have worked with the present staff structure of a General Secretary and an Executive Coordinator; another of the Executive Coordinator, General Secretary, and Membership Coordinator; and sampling recent past and present committee chairs.

### BUDGET

From the motion from the 2022 CLSA convention: Anticipated costs: \$20,000 - \$30,000 from October 2022 – October 2024 from CLSA regular operating budget.

5/23	Survey Monkey	Survey	\$468.00
10/23	Uber	Uber Trip for SVTF dinner	\$9.90
10/23	Mader's Restaurant	SVTF Dinner	\$382.81
10/23	Paul Counce	SVTF Meeting/Dinner	\$301.71
10/23	Hyatt	Listening Lunch/Convention	\$16,294.03
11/23	Fedex Office	SVTF Print Outs	\$488.10
5/24	Multiple Vendors	SVTF Baton Rouge Meeting & Travel	\$3,610.15
		<b>Total SVTF spending:</b>	<b>\$21,554.70</b>

## **APPENDIX C - ADDITIONAL SUGGESTIONS IN RESPONSE TO LISTENING SESSIONS AND SURVEYS**

What follows are not formal recommendations from the Task Force, but a collection of further suggestions that arose in the context of or as a result from the listening sessions and surveys. Some of these have already been done, are being done or are already being planned for the future. The Task Force shares these out of an abundance of transparency and accountability.

### **Welcoming/Networking**

- ◇ Members naturally lean towards conversing with former classmates and natural friend connections, but we also need to be more open on an individual level to getting to know new people.
- ◇ Eliminate banquet table sign-up sheets.
- ◇ BOG to sit with members at banquet tables instead of with each other.
- ◇ Convention buddy (seasoned member to accompany newer member).
- ◇ Sign-up sheet for those with no one with whom to go to lunch/dinner or would simply like to meet others (*e.g.* meet in the lobby at 6 pm to walk to dinner).
- ◇ Ask newer/lesser-known members to lead a prayer, read at Mass, etc., rather than known or BOG members; the same could apply to presiders at Mass.
- ◇ Schedule speakers of color.
- ◇ Ask new JCDs to present their research as seminars and/or webinars.
- ◇ Recipients of a CLSA scholarship and recent JCL grads should present webinars.
- ◇ Implement and promote awareness of CLSA mentor program.
- ◇ Create webinars, publications, presentations, etc. to serve the needs of multi-lingual (*e.g.* Spanish, Vietnamese, Tagalog, etc.) tribunal ministry.

### **Spiritual / Prayerful Focus**

- ◇ Spiritual reflection instead of one of the major addresses or as the keynote address.
- ◇ Sacrament of Penance available at specified times at the convention.
- ◇ Brief period of adoration at the convention if the (arch)bishop permits this.

### **Nominations**

- ◇ Call for nominations from members earlier in the year.
- ◇ Have more people running for each position.
- ◇ Call for nominations from members for the Role of Law award.

### **Cost**

- ◇ Add sponsorships for cost reduction at the convention.
- ◇ Number-crunching re: dues & convention cost.
- ◇ New membership categories.
- ◇ Consider multi-year contracts with a hotel to save money.
- ◇ Research new means of fundraising.

### **Website Improvements**

- ◇ Provide a brief explanation about each committee and names of the committee members so as to have better understanding about work on projects.
- ◇ Improve electronic media such as website and database.
- ◇ Make “Groups” feature more intuitive.
- ◇ Eliminate newsfeed.
- ◇ Provide links to canonical resources such as other canonical societies and faculties.
- ◇ Ask convention presenters to conduct their presentations as webinars.
- ◇ Ask webinar presenters to conduct their presentations as podcasts.
- ◇ Increase webinars, both academic and practical.
- ◇ Increase digital publications.

### **Communication**

- ◇ Explain copyright and intellectual property requirements.
- ◇ Increase transparency with members regarding the work of the BOG and committees.

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as of September 30, 2024***

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