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James A. Serritella, Esquire

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REGIONAL MEETINGS OF DIOCESAN ATTORNEYS

JAMES A. SERRITELLA, ESQUIRE*

One of the two most appealing features of the California Diocesan Attorneys' meetings is geography. I attended one at the Del Coronado in San Diego, and it was just fantastic. Having been inspired by San Diego, Carmel and Yosemite, we decided to do something in Illinois, where we have Bloomington, Shawneetown and Beardstown. On the basis of that inspiration and after a lot of effort, we had our first meeting.

The truly great features of the California meetings are that the attorneys conduct them so well, and their meetings have been so productive. The unfortunate feature is that they are so difficult to reproduce. One of the useful things about the Illinois experience is that it may be a little closer to earth and a little bit easier to reproduce elsewhere.

There are only six dioceses in Illinois. There are twelve in California. It's a lot easier to have stimulating discussion when you have twelve people around the table than when you have six people around the table. If two or three people don't show up out of six, then you don't even have a foursome. If two or three people don't show up out of the twelve, you still have a reasonable size meeting.

We have all heard about the social element of the California meetings. An important point to-emphasize is that the meetings do not grow out of a need for camaraderie or to socialize. They grow out of what I perceive to be three very real needs in our professional lives.

First, if you are strictly a litigator, you can join the litigation section of your state bar association and exchange ideas with litigators. The same is true with almost any other legal specialty. You have ample opportunity to test out your ideas, and be brought up to date on the latest developments. On the other hand, there are very few organizations for lawyers who represent dioceses. These state or regional or provincial meetings give us the kind of opportunity that other lawyers with other specialties

* Reuben & Proctor, Chicago, Illinois

take for granted. They give us an opportunity for professional interchange regarding an important part of our practice.

The second need relates to something that I am sure we have all experienced. A bad precedent in one part of the country or in one part of our own state can have an adverse impact elsewhere. We have to live with that precedent and its results. If you have the diocesan attorneys in the state sit around the table with each other once or twice a year, that at least reduces the possibility of their creating adverse precedents for each other.

Third, there are some activities that require statewide coordination. For example, in Illinois the dioceses brought their schools under unemployment compensation. We did not have regular meetings of the Illinois Diocesan attorneys at that time, and we experienced a clear need for such a device to assist in the coordination.

In sum, these regional meetings proceed from at least three very definite needs: the need to exchange ideas, the need to avoid bad precedents, and the need to coordinate professional activities. In Illinois a problem that was an expression of all three needs was the catalyst for our first meeting. The Illinois Department of Revenue decided that it was going to crack down on the 102 counties in the state because many of the counties had done very little, if anything, to verify the validity of real estate tax exemptions. As long as the Department of Revenue was cracking down on the counties, the counties (of course) would have to crackdown on the tax-exempt organizations. As a result, our tax-exempt clients found themselves digging in their archives for 150-year-old deeds and affidavits to substantiate exempt uses that predated most living persons.

The vehicle for bringing us together was the Illinois Catholic Conference. The Illinois Catholic Conference authorized us to assist Catholic organizations in the state to maintain their real estate tax exemptions. Of course, the most effective way of doing this would be to work through attorneys in each county. The meeting of Illinois Diocesan attorneys greatly assisted in implementing and coordinating such an effort. While we were meeting on that issue, we of course discussed many other issues.

As we were planning our first meeting, we uncovered another need. We ordinarily attend meetings with bishops. The bishops meet with each other. But the people who are doing the work that relates to the lawyer are frequently the chancellors and the vicars general. The information and advice to the bishops may or may not be available to the chancellors. To respond to this possible information gap, we decided not to have the lawyers meet in isolation. We had a joint meeting with the chancellors and the vicars general.

The lawyers and the chancellors met separately for about half a day. Then for the remainder of the day, we had a joint meeting. We first addressed ourselves to the matter at hand, coordinating our activities with

respect to real estate tax exemptions. Then we dealt with a whole range of other issues. The range of issues included information processing, school records, mental health records, and social services records.

At the end of the meeting, we discussed the need for future meetings. It was the recommendation of the lawyers — and I think it was universally accepted by the chancellors — that there be future meetings on a regular basis, perhaps twice a year, and a short meeting over lunch in connection with the annual Diocesan Attorneys' Association meeting. It was understood that we were not going to begin at the level where California is after 15 years of experience — two-day sessions, a great mixture of camaraderie, social life and a very important legal discussion. We know we will have to begin by addressing ourselves to the legal issues. As time goes on, we have every reason to expect that friendships will develop, camaraderie will develop, and we will be able to enjoy these pleasant, human supports for these important meetings.

We are working toward that in Illinois. I think it would be very pretentious to say we have gotten to that point. We haven't.

I think we should return briefly to a practical question I mentioned at the beginning of my report. What do you do when you've got six dioceses in a state and not twelve, and you've got three or four people sitting around the table and not a dozen? We touched on the issue in our meeting. The more I reflect about it the more I am convinced about the direction that we should take. That direction is to let the lawyers in adjoining states know when we are meeting and extend invitations to them. That expands the number of pretty locations we can meet in. More importantly, it also expands the number of people around the table. It extends the number of ideas and problems we will discuss and the number of viewpoints that will be available to us.

Another practical problem emanates from the fact that diocesan business for some diocesan attorneys may only take up to 10 percent of their practice, maybe even less. To take a full day or day and a half out of these lawyers' busy schedules to discuss church issues could be a difficult imposition. I made that point at our joint meeting with the chancellors. We discussed an arrangement that might be workable elsewhere. The clients will pay for the attorney time at these meetings and the attorneys will pay for their own expenses. The idea being that if we want to enjoy the kind of fine surroundings that we hear about in California (although I don't know where we'd find them in Beardstown), that should be on our own tab. On the other hand, meeting time is working time and could be appropriately compensated as such. The immediate and direct benefits our clients would derive for this expense is quicker, and I trust, more enlightened service. That means less expensive service.

In fine, our brief experience with these meetings indicates that they are good and should be encouraged. Their utility is something we have to

work toward. Successful meetings don't happen naturally, and they don't happen very easily. We have tried to address some of the obstacles to these meetings in Illinois. It's a pretty state, but we don't have many picture-book places in which to meet. It is a large state, but we only have six dioceses. It is relatively speaking a wealthy state, but some of the dioceses are small and provide only a very small portion of the lawyers' business. We're trying to work within these parameters. We're moving along slowly. In years to come I hope I can come back here and report on great success. If I can't report on great success, I at least hope that some of the ideas that we have tried will be of help to you.

Thank you.