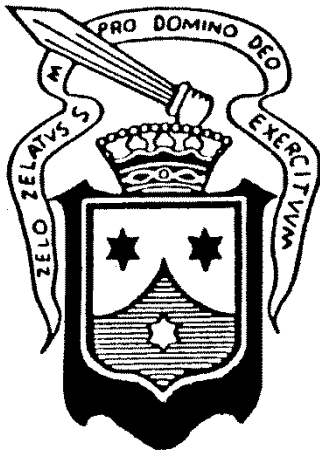


# Formation Manual 2022



For the North American Region:  
Province of the Most Pure Heart of Mary  
Province of Saint Elias

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## INTRODUCTION

Every human being is in a continual process of transformation. For those who respond to the call to Carmelite life, this transformation is marked by a commitment to “a journey of gradual and progressive conversion, encompassing every aspect of life,” during which they allow themselves “to be conformed to Jesus by the action of the Spirit and to come to union with God.”<sup>1</sup> This formative journey is not merely a stage preceding permanent membership in the Order; it is a dynamic process, which continues until death. “God renews his call day by day and always expects a fresh response from us.”<sup>2</sup> Carmelite life consists in the on-going surrender of the will to God’s transforming action. In truth, “the formative process can never be said to be completed.”<sup>3</sup> Therefore, initial formation is understood as a time for developing a capacity for discernment, flexibility, and availability – qualities that enable us to renew our lives constantly.

“God’s call, his free gift, does not fall on neutral ground; it is addressed to individuals, each with a particular story of grace and sin.”<sup>4</sup> The initial formation process aims to respect individual patterns of vocational maturation and to guide candidates into full incorporation into the Order with prudence and “discretion, which is the guide of the virtues.”<sup>5</sup> The goal is to nurture personal growth into “a contemplative attitude which fashions and supports our life of prayer, fraternity and service,”<sup>6</sup> with the realization that “the primary responsibility for formation rests with the candidates themselves.”<sup>7</sup>

This edition of *Formation Toward Brotherhood: Carmelite Manual of Formation – 2022* describes the formation process as practiced in the two North American Provinces and adapted for use in Peru, Mexico, Trinidad & Tobago, El Salvador and Vietnam. The manual is revised every three years by the Inter-Provincial Formation Commission. It represents a continuum of experience in the development of Carmelite life from the period of vocational discernment through initial formation.

“Our vocation as Brothers of the Blessed Virgin Mary of Mount Carmel is a form of religious life which belongs to the Church. It flows from the Church and participates in her mystery.”<sup>8</sup> The goals and responsibilities of that life are spelled out for us in the documents of both our Church and our Order. Of particular importance for our program are documents of the Second Vatican Council, the instructions of the Holy See on religious and priestly formation, the *Rule* and *Constitutions* of our Order, the *Ratio Institutionis Vitae Carmelitanae*, other instructions on formation from our Order and the Program for Priestly Formation of the United States Conference of Catholic Bishops (5<sup>th</sup> edition, 2005).

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<sup>1</sup> *Ratio Institutionis Vitae Carmelitanae*, “Carmelite Formation; a Journey of Transformation,” 2013. Abbreviated as “*Ratio*” and as RIVC; no. 5

<sup>2</sup> RIVC, no. 24

<sup>3</sup> RIVC, no. 19

<sup>4</sup> RIVC, no. 15

<sup>5</sup> Rule of Saint Albert, Chapter 24

<sup>6</sup> RIVC, no. 4

<sup>7</sup> Carmelite Constitutions, 2019, no. 132

<sup>8</sup> RIVC, no. 7

The primary task of formation is the development of the whole person. Formation must help candidates to develop and embrace authentic ideals regarding prayer, community life and ministry – ideals which can inspire and support them on the path of conversion. In addition, formation should assist individuals in coming to know themselves and in discovering their particular ways of living out the ideals they have chosen. Growth – spiritual, intellectual, moral, and emotional – is the desired outcome of the formation process.

As the candidate passes through the various stages of formation – vocational discernment, pre-novitiate, novitiate, the period of simple profession, and formation for ministry – he is encouraged to deepen his contemplative outlook, for, as the *Ratio* indicates, “The contemplative dimension is not merely one of the elements of our charism (prayer, fraternity, and service): it is the dynamic element which unifies them all.”<sup>9</sup> “Contemplation is the inner journey of the Carmelites, arising out of the free initiative of God, who touches and transforms us, leading us towards unity in love with him...It is a transforming experience of the overpowering love of God.”<sup>10</sup> All facets of the formation program, and indeed of Carmelite life, should have as their long-range goal the deepening of contemplation.

Those who are called to formation ministry are engaged in a vital and demanding apostolate, rendered all the more challenging by the cultural diversity of our formation communities. “God’s action is mediated by formators, who are placed as ‘older brothers’ at the side of those whom God has called.”<sup>11</sup> The formation directors are charged with the overall development of the candidates as Carmelites. Their duties are outlined in the *RIVC*, no. 67. They include the responsibilities of formators to accompany, to instruct, to evaluate and to help candidates to discern the promptings of the Spirit in their lives. “The Prior Provincial and his Council, [sic] shall be directly involved in formation—through visits, formal conversations, sharing of information—and along with the team, in evaluations and final decisions.”<sup>12</sup>

The ministry of formation is so complex and delicate that it would be difficult for one person to undertake it completely on his own. This is the reason, whenever possible, for having a formation team, which may include non-Carmelites. Through the sharing of ideas, experiences, professional insights and mutual support the team members exercise a helpful ministry to each other for their own continued growth as individuals and as collaborators with life responsibilities.

Even with these honest efforts of the formation program to help the new Carmelite put on the heart of Christ, the words of the Apostle Paul to the Church at Corinth apply, “I planted, Apollos watered, but God caused the growth. Therefore, neither the one who plants nor the one who waters is anything, but only God, who causes the growth.”<sup>13</sup>

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<sup>9</sup> *RIVC*, no. 28

<sup>10</sup> *Ibid.*

<sup>11</sup> *RIVC*, no. 66

<sup>12</sup> Carmelite Constitutions, 2019, no. 130

<sup>13</sup> 1 Corinthians 3:6-7

## **INTERPROVINCIAL STRUCTURES**

Interprovincial cooperation in regard to formation is a concrete expression of our charism of fraternity. It is in this spirit that the Saint Elias Province and the Most Pure Heart of Mary Province agree to cooperate in areas of mutual concern. The main reasons which inspire us to favor a policy of collaboration are (1) our common charism; (2) the need to have sufficient numbers of candidates at all levels of formation in line with the General Council's encouragement to establish regional formation programs, and (3) the reality that duplicating formation programs at the theological and novitiate level would not make the best use of our personnel and economic resources.

The complete program envisioned in this document is considered a Joint Formation Program. Thus, Joint Formation Program means that both Provinces rely on the cooperation and mutual trust of one another while making ordinary decisions while always in dialogue with their appropriate Provincials in a way respecting the canonical rights and obligations of both Priors Provincial.

### **Provincial and Council**

The Provincial and Council of each Province are directly responsible for the overall policy of formation in their respective Provinces. They shall be directly involved in formation through visitations, meetings, inquiries, and with the participation of the team, in evaluations and final decisions.

### **Provincial Formation Commission**

Each Province will form a Provincial Formation Commission as a consultative body. It will include at least a director of each level of formation and vocation ministry. This commission, during its regular meetings, will coordinate the overall formation policy of the Province. The commission makes recommendations to the Provincial Council regarding any changes in formation policy, personnel, and programs. Their primary concern is to deal with formation issues that pertain to their Province.

### **Interprovincial Formation Commission**

The Interprovincial Formation Commission as a consultative body is concerned with issues in formation that are of a mutual concern to both Provinces. The Interprovincial Commission is made up of all members of both Provincial Formation Commissions and a professed student representative. The purposes of the commission are 1) to serve as a forum for the exchanging of ideas and to offer support among formation personnel; 2) to serve as formation policy advisors to the respective Priors Provincial and their Councils; and 3) to serve as a means to acquaint the respective Provinces with the programs and policies of formation.

One member of the Interprovincial Formation Commission will be elected the chairperson of the commission. The responsibilities of the chairperson are the following:

1. to convene, chair and establish the agenda for meetings
2. to maintain communication between various levels of formation and with the Priors Provincial and their Councils
3. to be responsible either directly or through delegation for the revisions of the manual.
  - a. Each revision is done in the "off" Chapter year – the year when neither Province is having a Chapter. (i.e., 2016, 2019, 2022, 2025 etc.)
4. to discuss personnel for formation with the Interprovincial Formation Commission and take recommendations from the Commission to the Councils
5. to keep abreast of and provide suggestions to formation teams of pertinent conventions, literature, and workshops.

### **Formation Representative for the Interprovincial Formation Commission**

A Carmelite simply or solemnly professed in formation is chosen for one two-year term by those in formation from the novitiate on. Election for this position happens typically at the Student Gathering at Whitefriars Hall in January, or through mail/email ballot, if necessary, during a different time of the year. The Carmelite student representative gathers comments and/or questions from his peers to be presented at the semi-annual meetings. He serves as a voting member of the Interprovincial Formation Commission.

### **Sharing of Information and Evaluations**

As each student completes his current level of formation, e.g., going from the pre-novitiate to the novitiate, or leaving the novitiate as a simply professed friar, the formation director of the place he is leaving shall write up an honest evaluation of the person. This evaluation shall note both the strengths and gifts of the student, along with a frank description of his difficulties and a listing of the areas in which he needs to grow if he is to be a good candidate for our way of life. This evaluation shall be placed in the student's file, which is sent first to his proper Provincial Office and then to the director of the next formation level.

It is highly recommended that, in addition to writing such a report, the two directors of the levels involved should meet with one another to discuss the student in all his aspects. This discussion should be frank, open, straightforward, and complete. Being honest in this situation will be helpful to the student and to those working as formators. This conversation should also take place between the formators and intern directors.

## CARMELITE VOCATION MINISTRY

“The calling to religious life, like every vocation, is a gift from God. We must, therefore, be attentive to the signs of the Carmelite charism in others and have the courage to put before them a specific proposal. The main objective of the vocation ministry is to help others discover the gift which they carry within themselves and respond to it by choosing the particular lifestyle which corresponds to it. The function of the ministry is, therefore, to accompany individuals on their journey of spiritual growth and to assist them in the task of discernment.”<sup>14</sup>

“Not only the person in charge of promoting vocations and the members of the host community, but every community and every member, shall strive to awaken vocations by the enthusiasm with which they live their own lives and by introducing others to the values of our tradition and our charism. Each provincial vocations promoter has an assistant in each community.”<sup>15</sup>

Vocations are the future of our Provinces. Like other religious congregations, we realize that vocation ministry is an integral and important provincial ministry that has direct effects on our future. Therefore, each Province will set into place a strategy for promoting vocations and continue to collaborate in the vocation effort.

In our vocation ministry, we draw upon the inspiration of Mary and Elijah (as primary models) and of Carmelites through the ages. This rich tradition offers inspiration for a plan for vocation ministry, which includes the following:

- the witness of our life
- specific work for vocations
- the work of vocation personnel
- Provincial and Interprovincial structures for vocations
- criteria for the discernment of vocations
- prayer for vocations

### **Raising Local Community Awareness**

Along with Provincial leadership those working in vocation ministry must encourage the local communities to promote vocations, particularly among the young. There are practical ways in which all can become involved in the vocational ministry of the Provinces. They are the following:

1. Identify Candidates
  - encourage vocations
  - refer people to the vocation office
  - invite potential candidates into our communities

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<sup>14</sup> *RIVC, no. 74*

<sup>15</sup> *RIVC, no. 75*

2. Renew Community life and Charism
  - potential candidates are looking for community and prayer
  - the quality of our life as men of prayer and as effective ministers is essential to our vocation program
3. Continue our own personal development
  - deepen our awareness of our own vocation, responding more generously and authentically to our own call.
4. Disseminate information about Carmelites and the vocation program.
  - preach on vocations
  - sponsor vocation awareness talks, meetings.
5. Pray
  - personally, in communities, in parishes, in schools, etc.

Each Province should have sufficient personnel for promoting vocations. Vocation directors are usually Carmelites, but in some cases lay persons serve in this capacity. Vocation directors may be full or part-time. The function and responsibility of the vocation directors are the following:

- a) to encourage communities to develop the vocational dimension of their lives and of their various forms of service, so as to promote vocations;
- b) to promote and coordinate vocation initiatives together with local assistants---involving, in particular, Carmelites who are in initial formation;
- c) to discern the signs of a vocation in others, and to invite them to join the Order;
- d) to accompany individuals on the journey of vocational growth;
- e) to liaise with diocesan and national agencies responsible for the promotion of vocations.

### **Interprovincial Cooperation**

Serving our Provinces as vocation directors, we have the unique opportunity of working in collaboration with each other. Given the many common elements of our Provinces, we are able to provide encouragement and support through some very practical endeavors in promoting Carmelite vocations.

Efforts to collaborate will be possible only if vocation directors articulate elements common to both Provinces as well as those that are different. Any joint planning will necessarily include continual dialogue concerning the areas of difference. In discovering the many common areas in our ministry, we find ways of supporting, helping, and encouraging each other in our task of calling others to respond to a vocation in Carmel.

Since it is important that the vocation directors have a good working knowledge of the formation process, one vocation director from each Province will serve as an ex-officio member of the Interprovincial Formation Commission.



## **Social Media & Networking**

Although a vocation to religious life in Carmel is a gift from God, it comes through the mediation of Carmelites themselves. It is the lives of our Order's individuals and communities and their interactions with potential candidates that help attract men to discern a vocation with us. In the not too distant past those types of interactions came almost exclusively through direct personal contact. That is not the case any longer.

Each Province has an Internet presence through various websites. Various pieces of vocation literature are regularly updated and published by each Province. The vocation director will provide this literature to the local Carmelite communities and ministries.

## **General Territorial Guidelines**

The vocation directors from the Province of the Most Pure Heart of Mary and the Province of St. Elias will continue to work together in areas of advertisement, vocation policies and to share experiences.

A potential candidate develops an identity with a specific Province of the Order. It is, therefore, imperative that an association with a specific Province begins as soon as the individual makes inquiries with the vocation director. A decision must be made prior to filling out an application as to which North American Province a man wishes to enter. Because of the close cooperation between the two Carmelite Provinces represented in North America, the following general guidelines will be followed as closely as possible.

When a person makes an inquiry and it is known where the individual resides, the place in which the interested person lives and from where he requests information, determines which Province responds to the inquiry.

If personal contact with a particular Carmelite is the source of the vocation prospect, the same geographical guidelines apply, save in exceptional circumstances, e.g., familial, personal relationship, etc. In such cases, the situation is resolved by the dialogue and cooperation of the vocation directors involved.

Territorial guidelines not addressed above should be referred to the Provincial Vocation Director. Candidates from areas where the Order is already present are advised to make contact with the Carmelites there to proceed with their inquiry and discernment.

Each Province is free to advertise and, through personal contact, to seek candidates anywhere there is interest, respecting the Carmelite provincial presence in focused areas. In responding to inquiries, the following territorial guidelines on the East coast will be followed:

**Most Pure Heart of Mary**

Archdiocese of Boston  
Diocese of Buffalo  
New Jersey  
Delaware  
Maryland  
Virginia  
West Virginia  
District of Columbia  
Pennsylvania:  
Erie, Altoona-Johnstown  
Harrisburg and Pittsburgh  
Florida Dioceses:  
Venice  
Pensacola-Tallahassee  
St. Petersburg

**Saint Elias**

Massachusetts (excluding the Archdiocese of Boston)  
Rhode Island  
Connecticut  
Maine  
Vermont  
New Hampshire  
New York State (excluding the Diocese of Buffalo)  
North Carolina  
South Carolina  
Georgia  
Pennsylvania Dioceses:  
Philadelphia, Allentown, Scranton and Greensburg  
Florida Dioceses:  
St. Augustine, Orlando, Palm Beach, Miami

## **Vocation Discernment Weekends**

There are mature men who are experiencing a sense of God's call in their lives. In order to help men discern their call from God, each Province will sponsor vocation discernment weekends that will be planned by the vocation directors in collaboration with other members of the Province. The content and the experience of these discernment weekends will help these men answer the questions about whether they are called to live the Carmelite life.

The purpose of the discernment weekend is to introduce men to our way of life. It is a chance for them to ask questions of Carmelites. The retreat is centered on the topics of: Christian commitment, prayer, the vows, fraternity, ministry and the charism and spirituality of the Order.

## **Procedure/Criteria for Entrance into the Formation Program**

The person choosing to make application to enter the Carmelite formation program does so only at the invitation of the vocation director. The application process is a formal procedure, which must be guided by the vocation director. The individual should specifically request admission into the religious community.

“To be admitted to the pre-novitiate, candidates must show signs of a certain degree of human maturity, a living relationship with Jesus as the Lord of their lives, a definite ecclesial and social awareness, and the Carmelite vocation. The evaluation of these signs shall be made by the vocation promoter. Through contacts with his family, his neighborhood, his parish, and the movements or associations which have had a formative role in his life.”<sup>16</sup>

### 1. Age

-from at least 18 years of age to a maximum of 39 years

Age requirement: SEL: 18-35

PCM: 18-39

### 2. Education

A high school diploma is required

### 3. A convert is to wait -- two years before admission

4. Concerning candidates from a former seminary or religious institute, using the “Norms Concerning Reapplication for Priestly Formation (USCCB Number 2), “...no subsequent application will be considered in the two years following - dismissal.”

### 5. Capable of undertaking the obligations of the vowed life

-obedience, poverty, and chastity

-recognizes the public nature of the vowed life, usually demonstrated by a willingness to enter into public ministry in the Church

-A review of publicly accessible content on all social media, personal blog sites, and websites associated with accounts controlled by the Candidate.

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<sup>16</sup> *RIVC, no. 79*

-A candidate is to visit at least one of our priories and/or formation houses

6. Psychological/Emotional

- ability to express emotions
- healthy self-image
- some level of personal integration consistent with their Christian ideals
- capable of interdependence
- demonstrated an ability to live the celibate life for the last 2 years
- demonstrates a consistent ability to commit himself in the following areas:
  - employment
  - friendships
  - religious practices and communities

7. Community

- flexible and patient
- can deal with loneliness
- has a basic understanding of authority
- takes part in community

8. Intellectual

- sufficient intelligence to do advanced studies in philosophy and theology
- ability to be creative, responsible, and independent in thought
- demonstrates academic capability (e.g., can carry a regular class load)

9. Health

- demonstrates good stewardship of his health by reasonable management of any health issues (e.g., his weight, responsible use of alcohol, etc.)

10. Spiritual

- has a relationship with God
- has been a practicing Roman Catholic in good standing for at least 5 years
- values prayer and sacraments
- is open to spiritual growth and direction
- has some knowledge of Catholic doctrine
- a candidate is to participate in a Province sponsored Vocation weekend.

11. Carmelite

- attraction to Carmelite charism
- some understanding of the spirit and works of the Order
- awareness of Order as community

12. Apostolic

- willingness and ability to work
- desire to devote his life to God's work in the Church
- capacity to share in the ordinary work of the Province
- possesses an attitude of outreach and service to others

### 13. Financial

-free of outstanding personal debts and obligations except education loans. Educational loans will be paid in full at solemn vows but the Provinces will make the necessary arrangements and payments to creditors so that the loans do not default while the candidate is in our formation program.

Once it is determined by the vocation director that these requirements are met, the candidate is encouraged to begin the application process. Respecting the confidentiality of the candidate, the vocation director will see to it that the following are done:

#### Application Process:

1. Each candidate is invited to visit at least one of our houses. The vocation director or a team member will accompany him. The person's ability to interact with others is assessed.
2. Each candidate should try to participate in one of the Province-sponsored vocation discernment weekends. Those candidates that seem acceptable are encouraged to begin the application process by the vocation director. This includes:
  - A. A written autobiography – at least 12-15 pages
  - B. Applicant's personal inventory (Form C)
  - C. Application for Admission to the Formation Program (Form D)
  - D. Criminal background checks:
    - 1) Form H-1 Release of Information for Background Checks and National Sex Offender Registry Check
    - 2) Form H2-Praesidium
    - 3) Social Media and Credit Form H-1 Release of Information for Background Checks.
  - E. Medical History Form and Immunization Record (Form I)
  - F. Transcripts/certificates (all college level transcripts, and if none, high school transcripts. 2 official transcripts---one sent to the Vocation Office and one to be sent directly to the College/University Admission Office.
  - G. Legal Documents: copies of birth certificate, driver's license, passport, social security card
  - H. Church Documents: copies of Baptism and Confirmation certificates
  - I. Annulment or declaration of nullity, if previously married
  - J. A review of vocation databases and other vocational files to determine if the candidate has had previous vocational contact or been in formation with the Province(s), taking note of any special notations from the previous director and formators at the time.

3. Prior to admission each candidate is to undergo
  - Psychological evaluation conducted by a licensed psychologist, which includes projective tests (e.g., Bender-Gestalt, House, Tree, Person, Rorschach), intelligence tests (e.g., Wechsler Adult Intelligence Scale), personality tests (e.g., Meyers-Briggs, MMPI-2) vocational interest tests (e.g., Strong Interest Inventory, Edwards Personal Preference Schedule, Ministry Potential Discerner).
  - Along with these tests, a detailed interview will be done by the psychologist. A good assessment should be made particularly of a person's interpersonal relationship patterns and level of psycho-sexual maturity.
  - All applicants will be given a specific test for screening sexual history such as the Clarke Sexual Inventory.
4. Applicant's Release (Form E) --Following the guidelines of the USCCB *Norms Concerning Reapplication for Priestly Formation*: "At the time of future application the applicant must permit the release of all relevant information concerning his departure from any previous program of Priestly formation or institute of consecrated life or society of apostolic life...to whom he is applying."
7. When the Application is completed, the Admissions Board is convened.

The members of the Admission Board for both the PCM and SEL Provinces consist of the Prior Provincial, the Director of Vocations, the Director of Formation. The Vocation Director(s) presents the candidate to the Board of Admissions. The Vocation Director prepares the Board members with all the pertinent information about the candidate. The Prior Provincial, with the advice of the Admission Board, decides the outcome of the candidate. A formal letter is sent to the candidate of the outcome.



## THE PRE-NOVITIATE IN GENERAL

### Purpose

The purpose of the pre-novitiate is to prepare the candidates for entry into the novitiate where their journey as Carmelite religious will begin. Its purpose is:

- to deepen their faith and learn to own it more personally
- to deepen their knowledge of themselves, of their personal and social history, and their backgrounds.
- to facilitate on-going discernment of their vocation to Carmel.
- to introduce the pre-novice to religious life, especially as it is lived in the Province.
- to prepare the pre-novice for the novitiate and further stages of initial formation.

### Introduction

The *Ratio* states: “Individuals who ask to begin the journey of Carmelite formation feel themselves to be called by God and wish to respond affirmatively.”<sup>17</sup>

“Pre-novices must be able to accept the demanding challenges of the formative process, and to choose to follow, freely and responsibly, their Carmelite vocation, for which they feel sufficiently mature.”<sup>18</sup>

“The first questions we ask are whether the candidate shows the signs of a vocation to Carmelite life and whether he appears to have the human and Christian qualities required to live this life. It is important to be very clear from the beginning.”<sup>19</sup>

The *Ratio* identifies many tasks for the period of the pre-novitiate.<sup>20</sup> These include:

- 1) **discernment** on the part of the candidate concerning his potential vocation;
- 2) **evaluation** of the suitability of the candidate by the community according to the criteria given in the *Ratio* and *Formation Manual*;
- 3) **accompaniment**, which refers to the formation program. The program should address itself to questions of human, psychological and vocational maturity, academic preparation for the novitiate and post novitiate studies, catechesis and a deepening in Christian formation, knowledge of religious life and the specific values of Carmel as specified in the Program of Carmelite Studies in the *Ratio*, and the interiorization of the values involved in following Christ.

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<sup>17</sup> RIVC, no. 79

<sup>18</sup> RIVC, no. 81

<sup>19</sup> RIVC, no. 89

<sup>20</sup> RIVC, no. 67

## **Discernment**

Various means are offered to the candidates during the period of pre-novitiate in order to assist them in discerning their vocation. There are three elements to this process: 1) one-to-one sessions, 2) group dynamics, and 3) spiritual direction.

1. In the one-to-one sessions, the candidate meets with the formation director on a regular basis; the dialogue aids the candidate to appraise more objectively the happenings of his life. In the discussion there is focus on various aspects of the pre-novitiate experience, the candidate's relational, academic, ministerial and spiritual life as well as his participation in the life of the community. The candidate begins to see the events of his life in the context of following "in allegiance to Jesus Christ" according to the charism.
2. Group sessions are conducted on a monthly basis by an outside facilitator. The purpose of these sessions is to work on communications skills, to help improve the formandi's communication skills and interpersonal skills, to give and receive helpful and honest feedback on interpersonal skills, and to assist peer interaction.
3. Each candidate is required to have a spiritual director with whom he meets monthly. The purpose is to guide him in his spiritual life by helping him to reflect upon his relationship with the Lord, his vocation, and his experiences in the light of faith and the Gospel.

Counseling and therapy services will be available to the students at the determination of the Pre-Novitiate Director.

## **Evaluation**

Evaluation occurs regularly throughout the formation process. One-to-one and group sessions provide opportunities for informal feedback. The annual formal evaluation of each pre-novice occurs in March.

There are three norms for evaluation (1) the candidate's call from God and the call coming from that relationship are crucial in determining the fitness of the candidate; (2) candidates should be capable of undertaking the obligations of the religious state in our Order and of progressing towards fuller maturity; and (3) it is not envisioned that the expected qualities be fully developed, but it is essential that evidence of their potential is present.

Nine qualities are the subject of evaluation: (1) psychological maturity, (2) ability to live in community, (3) sufficient intellectual ability, (4) spiritual maturity, (5) growth in Carmelite identity, (6) experience of, as well as a basic understanding of, good liturgy and ministry, (7) self-sacrifice - the ability to give of oneself to the community generously, (8) good personal health habits, (9) ability to develop a mature and integrated celibate sexuality.

## **Accompanying**

Candidates are invited to live in a community established for new members. The purpose of this



community is to assist in the tasks of discernment and evaluation. Activities are structured to determine whether or not the candidate has sufficient human and Christian maturity for undertaking the novitiate and has the proper academic background and ability to complete the studies necessary for formation. The candidate should possess a balanced affectivity, especially sexual, which presupposes the comfortable acceptance of the other, man or woman. Finally, the candidate has to have the ability to live in community in the form determined by the Carmelite charism.

### **Ministry**

Each pre-novice is expected to have an “outside” ministry. The pre-novice is to determine what ministry he would like to do and its schedule, with the approval of the Pre-Novitiate Director. The time and energy invested in this ministry should not restrict his participation in community life or academics.

### **Community Life**

Each pre-novice is expected to be regular in his participation in both the formal and informal aspects of community life. The formal aspects include communal prayer, communal meals, formation sessions (weekly and monthly), house jobs, house meetings and ministry commitments. The informal aspects include being present and hospitable to guests, recreating together, helping each other in house jobs and in studies, and participating in community activities and events.

Involvement in our Carmelite community life is demonstrated by a commitment to the following:

- attend Eucharist and communal prayers, meals and recreation daily;
- spend time alone and quietly;
- read and reflect upon scripture;
- invest himself in the community and not feel compelled to rely solely on outside friendships and relationships;
- manifest generosity in doing his house chores and giving of his time to others;
- share openly his relationships both inside and outside community;
- maintain a reasonable personal appearance and care of his room;
- manifest honesty, responsibility and accountability in relationship to himself and others;
- extend hospitality to his own and others’ guests;
- minister outside the Carmelite community as well as within.

### **Sharing of Information and Evaluations**

As each student completes a level of formation, e.g., going from the pre-novitiate to the novitiate, or leaving the novitiate as a simply professed friar, the formation director of the place he is leaving shall write up an honest evaluation of the person. This evaluation shall note both the strengths and gifts of the student, along with a frank description of his difficulties and a listing of the areas in which he needs to grow if he is to be a good candidate for our way of life. This evaluation shall be placed in the student’s file, which is sent first to the Provincial Office and then to the director of the next level of formation.

It is highly recommended that, in addition to writing such a report, the two directors of the levels

involved should meet with one another to discuss the student in all his aspects. This discussion should be frank, open, straightforward, and complete. Being honest in this situation will be helpful to the student and to those working as formators. This conversation should also take place between the formators and intern directors.

### **MATTERS FOR DISCERNMENT: A Series of Questions for Ongoing Discernment in all levels of the Formation Process**

Use the following series of questions for a self-evaluation. This evaluation can be done privately, prayerfully for ongoing discernment and transformation process. Some parts of it might be done with a close and trusted friend.

#### **Human Formation**

- Do I have a sense of joy and deep peace in my life as a Carmelite?
- Am I at home with the Carmelites?
- Am I approachable, hospitable, and welcoming?
- Do I relate well to my brother Carmelites, encouraging them and challenging them in their vocations?
- Do I have and cultivate warm, healthy friendships with other Carmelites, priests, women religious, lay men and lay women? Are these relationships open rather than secretive or exclusive?
- Do I cultivate healthy pastimes, hobbies that make me a well-rounded, growing, and interesting person?
- Do I have sufficient self-knowledge, knowledge of my talents, and of my strengths and weaknesses?
- Am I aware of and sensitive to the different ways in which most men and women react to situations, or the differences in which men and women experience relationships?
- Do I have self-discipline, an ordered life that I am in control of, rather than pushed or pulled in every direction, and wasting time?
- Do I have a true and wholesome self-esteem rather than a very low self-esteem which can lead to aggression, jealousy, defensiveness, arrogance, and bullying?
- Do I like myself, or at times dislike or even hate myself? Do I have a healthy – and accurate self-image?
- Am I able to persevere in pursuing legitimate goals, or do I lack focus, method, order, and consistency in my life?
- Can I, do I, have I taken initiative for my own formation, and have I exercised leadership in community life activities and projects?
- Have I developed a sense of responsibility to take on seriously the work, study, play, and social life in my everyday life?
- Do I have a healthy, constructive attitude to authority, ready to be critical, transparent, participative, and yet deeply responsive, responsible, and obedient?
- Am I aware and appreciative of my own sexual orientation? How do I relate to one who may have a different or a bisexual orientation? Am I able to discuss this with my spiritual director?
- Do I regularly review my own character or run away from this review? Do I allow, and at times ask others to criticize and evaluate me and my character and growth as a Carmelite?

- Am I balanced - somewhere between extreme extrovert and extreme introvert, thus with a balance between social skills, outreach, and appropriate self-reflection?
- Am I basically stable in my emotions, or excessively prone to moodiness, impulsive or erratic?
- Am I open, able to disclose myself when helpful, or overly defensive, and thus fearful, lacking in confidence and unable to be formed?
- Do I carry unresolved anger? How do I deal with anger? Have I been able to heal broken relationships?
- Am I overly assertive so that I do not listen? Or am I under-assertive so that I do not use or contribute my talents and gifts sufficiently?
- Am I able to restrict my use of the Internet, email, and social media, making prudent decisions about these tools?

### **Spiritual Formation**

- Am I in touch with God, and able to speak about and share my experience of God? Do I have a devotion to Jesus in the Eucharist and in the Gospels?
- Do I regularly benefit from the Sacrament of Reconciliation?
- Am I faithful and regular in my prayer life? Am I faithful to *Lectio Divina*?
- Am I developing a strong interior life?
- Do I have a regular, positive relationship with a spiritual director, confessor, or soul friend?
- Do I cherish silence and recollection? Do I schedule regular periods of solitude – able to be by myself and with my God?
- Do I value celibacy as a personal call, gift, and grace of the Holy Spirit?
- Am I at peace and comfortable with my celibacy?

### **Carmelite Formation**

- Do I have an affinity with the Carmelite charism by showing an interest in prayer, in listening to the Word, in fraternal service and in the Marian tradition?
- Am I making my own, interiorizing the spiritual practices of Carmel, seeing them as needs for my personal growth and holiness, and not simply as duties or rules imposed?
- Do I relate to Mary as a model of faith, Mother and Sister?
- Do I show a lively interest in the spirit and works of the Order and Province?
- Am I able and willing to take part in and create a community of fraternal relationships?
- Am I able to develop and maintain proper boundaries in relations?
- Am I free from internal and external pressures to join the Order?

### **Intellectual Formation**

- Am I eager to learn, to grow in knowledge and understanding of the faith?
- Am I developing a habit of reading - reading both religious and high-quality secular literature?
- Do I have a growing familiarity and friendship with the Scriptures, as well as growing in an up-to-date critical understanding and study of the Scriptures?
- Do I see my formation as a Carmelite as only the beginning and thus see the need for ongoing study and reading? Do I realize that I do not have all the answers and never will?
- Am I interested in, knowledgeable of and value the intercultural expressions of living in Carmel, so that I can assist in the inculturation of the faith? Do I see and appreciate values in traditional culture that are in conformity with the gospel?

- Am I able to express the theology and teaching of the Church in ways others that are pastoral and effective?
- Is my faith rooted in the Christian tradition, but also vibrant with contemporary directions and developments in theology?
- In light of the reality of sin, do I see all theology as leading to justice and involving a message of liberation?
- Is my vision of Church and religious life/priesthood shaped and formed by the documents of Vatican II and subsequent church documents?

### **Pastoral Formation**

- Not only do I pray, but can I lead and guide others in prayer?
- Do I take advantage of pastoral opportunities, and workshops, lectures on pastoral issues?
- Do I see and find Jesus in the persons I live with, and the persons I serve?
- Am I able to relate to persons of varied ethnic and religious traditions, and not show favoritism to a particular group?
- Do I take time and effort to improve my speech, my diction, my ability to project my voice to a large group?
- Either through classes or on my own, have I learned a system or at least the essentials of bookkeeping, of keeping financial records?
- Do I appreciate the distinctive role and mission of the laity in the Church and in the world?
- Do I listen to others, feel with them, so as to empathize with their joys and sorrows?
- In accord with Catholic teaching, am I strongly pro-life, beginning with life in the womb, with those on the fringes of society, and reaching out to the aged at the end of their lives?
- Do I see, exercise, and grow in the practice or ministry of conversation, engaging in constructive dialogue with my Carmelite brothers and beyond? Am I able to enter into mature dialogue with staff who work in our houses and ministries as well as my brothers?
- Do I have a critical (positive and negative) awareness, use of, and relationship with the various media and communication technologies? Am I able to instill this critical awareness in others?
- Can I cooperate in common projects and collaborate as a member of a team or am I overly individualistic or even hostile to some groups or individuals?
- Do I see the need to collaborate with other Carmelites, and increasingly with the laity in carrying out the mission of the Church?

### **Praesidium**

At every level of formation, the student will adhere to the standards of the Praesidium, Inc., accreditation program (see Appendix 8 – “Praesidium, Inc.,” pg. 78) and participate in the program’s training and updating in a timely manner.

### **Departure from Community**

If a student is asked to leave the formation program, or if he decides to withdraw from the program, the formation director will write a one-page summary outlining the reasons for his departure from the program as well as a recommendation whether he should be re-admitted to the program at a future date. If the student applies to any other seminary or house of formation, there will be a sharing of information as deemed appropriate by the Provincial with the diocese, religious

community, or seminary. A copy is to remain in the provincial archives or other suitable place, along with any other material according to provincial guidelines, until such time that it is highly unlikely the student will be reapplying to another diocese, religious community, or seminary.

### **Program Evaluation**

Before the end of each year, the formator(s) will develop and administer a written evaluation of the formation and community experience to be completed by the formandi.

## **ST. ELISEUS PRIORY – SEL RESIDENTIAL PRE-NOVITIATE**

### **Entrance Procedure**

When a candidate has been accepted into the formation program as a pre-novice, the pre-novice director contacts him to let him know when to arrive and what he should bring with him. The program at St. Eliseus Priory usually begins either in the latter part of August or the beginning of January. New pre-novices are expected to arrive at the house in time to engage in the Orientation Program.

### **Orientation Program**

The year begins with a one-week program of orientation to the house, the local community and the religious life, followed by participation in the Carmelite Studies Program in Washington, DC. The pre-novices will also complete their registration programs at the schools they will attend.

### **Workshops and Retreats**

During the academic year, the pre-novices attend selected sessions of the Intercommunity Formation Program sponsored by the Religious Formation Conference, Hudson Valley Area. These workshops are usually held on Saturdays and Sundays at a location where candidates from different communities can join in learning about their vocation. All pre-novices participate in the Carmelite Studies Programs held at Whitefriars Hall each year. In addition, there are Days of Recollection in the Priory twice a year, as well as a five-day annual retreat. Each year, each pre-novice together with the community, will review the *Policy for Standards of Conduct* of the St. Elias Province, and a written record of this review should be included in the files.

### **Academics**

Students who are accepted into the pre-novitiate without having earned a bachelor's degree will attend Immaculate Conception School of Theology at Seton Hall University and, in most cases, follow a course of studies leading to a B.A. in Catholic Theology with a concentration in Philosophy (ThPh). The particulars of the program will be worked out in consultation with the Associate Dean of the school and the pre-novice director.

Students who have earned a bachelor's degree before acceptance will attend Immaculate Conception School of Theology at Seton Hall University and apply for the M.Div. program of

study. Emphasis will be on completing the requirements of the current *Program of Priestly Formation* in preparation for the study of theology.

Detailed application procedures for both the B.A. and M.Div. programs can be found online by logging into the website of the Immaculate Conception School of Theology at Seton Hall must be submitted.

Students who are accepted into the pre-novitiate in need of English Language Studies will attend an ESL program at the recommendation of the pre-novice director. After the initial ESL studies, each pre-novice will be transferred into the ESL Program at Seton Hall University until the appropriate level is reached. Prior to novitiate, all ESL students will need to complete the TOEFL test to an acceptable level.

Summer plans for all candidates will be worked out in consultation with the Provincial and the pre-novice director.

### **Financial Responsibility**

Acceptance of candidates is not based upon the financial resources of the candidate. As a rule, students are responsible for all their tuition, books, college fees, personal spending, and travel money. Each student is encouraged to seek out financial aid from his school. All students are responsible for their telephone and postage expenses.

Students who are in the United States using a student (F-1) visa are not able to work and so are exempt from having to pay for their tuition, books, etc. Pre-novices who have completed their bachelor's degree and will be taking philosophy courses are also exempt from paying their tuition and books. Financial arrangements for each candidate are discussed with the vocation director in consultation with the pre-novice during the application process and confirmed by the pre-novice director after a candidate is accepted. Any financial contribution that a student can make to help defray house expenses is appreciated.

Undergraduate students needing financial aid should contact the Office of Financial Aid at Seton Hall University as soon as possible upon acceptance, in order to arrange loans and other types of funding.

Those in the formation programs of the St. Elias Province are responsible for the payment of the cost of their undergraduate education. For those who have outstanding loans, the Province will assume the payment of these loans at the time of simple profession and for as long as the brother remains in the Province.

If the pre-novice has brought his own automobile, it is to be disposed of (sold, given to family, or donated) before he enters the novitiate.

### **Peer Evaluations**

During the spring evaluation of students, each student will write out a Peer Evaluation for each other students. He would use the form given in Form J – “Pre-Novitiate Peer Evaluation and Self-

Evaluation,” pg. 104. After writing out an evaluation, he will discuss what he had written with the student being evaluated. At the same time, the other student will discuss his own evaluation of the first student. After hearing from all the students in the house, he would then write a self-evaluation. The written peer and self-evaluations would then be discussed with the pre-novice director.

### **Admission to the Novitiate**

When the pre-novice has fulfilled the academic requirements, has lived at the pre-novitiate for a minimum of one academic year, has completed the above evaluation process, and he and the director have discerned that he is ready to enter the novitiate and should proceed (using the criteria in Appendix 5 – “Readiness for the Novitiate,” pg. 72) he may petition for admission to the novitiate. This petition consists of a written letter on house stationery sent to the Provincial via the postal system (not email) requesting admission. The Provincial will notify the pre-novice of his acceptance.

The following evaluation process will be followed for those petitioning for entrance to the Novitiate.

1. The pre-novice follows the peer and self-evaluation process described above.
2. The director prepares a written evaluation, and shares it with the pre-novice,
3. The Provincial calls a “local chapter” to meet with the director and any solemnly professed member of the house to discuss those pre-novices preparing for entrance to the novitiate. The results of the written evaluations are presented at this meeting, and the community is polled whether the student should proceed (i.e., a votation). The Provincial makes the final decision about admitting a pre-novice to the novitiate.

### **Sharing of Information and Evaluations**

As each student completes a level of formation, e.g., going from the pre-novitiate to the novitiate, or leaving the novitiate as a simply professed friar, the formation director of the place he is leaving shall write up an honest evaluation of the person. This evaluation shall note both the strengths and gifts of the student, along with a frank description of his difficulties and a listing of the areas in which he needs to grow if he is to be a good candidate for our way of life. This evaluation shall be placed in the student’s file, which is sent first to the Provincial Office and then to the director of the next level of formation.

It is highly recommended that, in addition to writing such a report, the two directors of the levels involved should meet with one another to discuss the student in all his aspects. This discussion should be frank, open, straightforward, and complete. Being honest in this situation will be helpful to the student and to those working as formators. This conversation should also take place between the formators and intern directors.

## **Praesidium**

At every level of formation, the student will adhere to the standards of the Praesidium, Inc., accreditation program (see Appendix 8 – “Praesidium, Inc.,” pg. 78) and participate in the program’s training and updating in a timely manner.

## **Departure from Community**

If a student is asked to leave the formation program, or if he decides to withdraw from the program, the formation director will write a one-page summary outlining the reasons for his departure from the program as well as a recommendation whether he should be re-admitted to the program at a future date. If the student applies to any other seminary or house of formation, there will be a sharing of information as deemed appropriate by the Provincial with the diocese, religious community or seminary. A copy is to remain in the provincial archives or other suitable place, along with any other material according to provincial guidelines, until such time that it is highly unlikely the student will be reapplying to another diocese, religious community, or seminary.

## **PRE-NOVITIATE PROGRAM XIBERTA CENTER – SAN SALVADOR, EL SALVADOR**

### **Entrance procedure**

Every candidate must have completed at least a high school education with which he is qualified to begin his higher education at the University Centroamericana (UCA) of San Salvador, and must have completed all the requirements of the admission process established by the Province of the Most Pure Heart of Mary, and must have been in contact with the local community for at least last six months before entrance, so that they can count with the community’s opinion in the possibility of the candidate being presented to the provincial admissions committee.

### **Week of Carmelite Studies and Orientation**

The pre-novitiate begins in February of each year, one month before the beginning of classes at the university as a way to have a quiet transition into community life. For three weeks, there is formation and maintenance work in the house, in such a way that they live in a space that has been worked on by the community.

**1st Week:** Norms of community life, schedules, use of the Liturgy of the Hours, study of the *Policies for Maintaining Ethical Ministries with Minors and Vulnerable Adults* of the PCM Province, and the importance of having a spiritual director.

**2nd Week:** Formation week: history of the Order, Carmelite saints, introduction to the Rule, Carmelite traditions and signs of identity.

**3rd Week:** Cultural week: history and reality of the Central American region. Visit historical and cultural sites in the Salvadoran territory.

**4rd Week:** psychological workshop on personal history.

Alongside formation, tasks are fulfilled such as painting the house, cleaning gardens and areas for the production of chickens, eggs and vegetables. It is also time to complete the registration process at UCA and migration process.



## **Activities during the year:**

### **Monthly:**

1. Once a month, students will participate in the inter-congregational meeting of the Conference for Religious in El Salvador which takes place every third Sunday of the month. The goal of this is so that our students share with young people—men and women—with common interests and know about the diversity of charisms present in our immediate context.
2. Every last Saturday of the month, the students will participate in a seminar-workshop on assertive communication where they are guided by a professional so that they grow in self-knowledge and develop skills for quality community communication. The topics are:

SESSION 1: Assertiveness: Definition, characteristics. Assertive and non-assertive behavior. Aggressive, passive and assertive relationships.

SESSION 2: Self-esteem: Definition of self-esteem, evaluation of self-esteem, causes of positive or negative self-esteem. Consequences of adequate development of self-esteem; limitations of inadequate self-esteem. How to modify self-esteem. Skills resulting from healthy self-esteem.

SESSION 3: Social skills and competences: Importance of Social Skills. Social skills and competencies as products of adequate self-esteem. Development of social skills.

SESSION 4: Conflict resolution: Definitions, Causes of conflict, Indicators of conflict, solution to conflicts, conflicts and communication skills.

SESSION 5: Communication and active listening: Communication: strategies, empathy and human relationships, Active listening techniques, Facilitators and blockers of active listening (emotional, cognitive and physical).

SESSION 6: Affectivity and religious life: What is affectivity? Affectivity and personal history, Self-knowledge and personality, environmental and social factors of affectivity. Affectivity and community life.

SESSION 7: Sexuality. Definitions, Dimensions of sexuality, sexuality, friendship and religious life, chastity and celibacy in religious life.

SESSION 8: Healthy behaviors and personal care. Definitions, Risk factors and protection factors. Search for health and SELF-CARE, stress, secondary trauma and burnout.

3. Last Friday of each month, desert day to reflect on Carmelite spirituality and their own discernment.
4. Special celebrations in memory of the Carmelite saints according to the liturgical calendar.
5. During Lent the pre-novices will carry out different activities such as Lenten practices: handing out food to homeless people, donating blood, penitential acts at home, fasting, etc.

### **Every fifteen days:**

1. Community meeting where we seek to identify problems and skills for the daily life of the brotherhood, discuss issues of common interest, and schedule activities.
2. Every fifteen days also, there will be one-on-one interviews between the pre-novices and the formator in order to have close and fluid communications on the development of the vocation to the religious life.

## **Weekly**

The formation community, in addition to observing an established schedule that includes Liturgy of the Hours (Lauds, Vespers and compline), Eucharistic Celebration, times at the university and personal study, sports practice as a means of coexistence, to know attitudes and a healthy sense of competition, meals, tasks, and personal hygiene, etc., every Saturday organizes a tribute to Mary with the presence of our neighbors that includes praying the rosary, Eucharist and sharing snacks and coffee at the end of the Mass as way of raising awareness among those in formation of being part of a model of the Church that is open and close to the reality of God's people.

Respecting the activities of CONFRES and our psychologist, Saturday and Sunday is free for each individual to include their participation in pastoral ministry for a weekly average of three hours, and Sunday Eucharist at the parish designated for pastoral work.

One purpose of the pre-novitiate is the appropriation of space and the development of pre-novitiate skills. For this purpose, different work areas are established and the students are rotated.

1.- Kitchen: They will help the cook and clean the dining room and TV room area.

2.- Vegetable garden: They will be in charge of planting vegetables such as chili, tomatoes, corn, radishes, etc.

3.- Animals: They will take care of and produce food such as eggs, chickens and rabbits. The importance of animal care is based on self-sustainability and the awakening of the sensitivity of care, in addition to the use of different.

4.- Hospitality: they will be in charge of taking care of the guests, cleaning the rooms and showing them around the house.

5.- Sacristy: everything related to the chapel.

## **Academic aspect**

The province has as a theological and philosophical formation center the Jesuit University “José Simeón Cañas” (UCA). At the end of the formation the student will receive a Bachelor of Theology degree validated by the Salvadoran State and another one as a Bachelor in Theology accredited by the Pontifical University of Comillas in Madrid, Spain. Centro Xiberta, in terms of university education, seeks to complete two years of philosophy, which correspond to the requirements established by Canon 250 of Canon Law for those who want to be a priest. In addition, the philosophical biennium is a requirement for the examination of Comillas, Spain. It is a degree required for all solemnly professed brothers. A total of 16 subjects are required to complete the philosophical studies.

The academic calendar of the UCA is: 1<sup>st</sup> semester from March to July, and the 2<sup>nd</sup> semester from August to December of each year.

Each student, on a personal or community initiative, may seek opportunities for complementary formation in areas such as music or other areas of personal and community interest.

All students will study English classes on Saturdays with an expert tutor, as a way to familiarize themselves with the English language.

Each year students will have a 6-day retreat. One year the director of formation will be in charge and the other year it will be directed by a guest, preferably a Carmelite.

## **Finance**

The province provides the student's expenses regarding his stay in the community: accommodations, food, studies, transportation, community recreation, basic health expenses. In

addition, every student receives a small tip for expenses such as photocopying, bus, and as a way of stimulating the development of a personal economy. On the part of the student or his family, they should cover expenses for clothes, footwear, personal hygiene, greater medical expenses.

The students will seek to generate food for the community as a form of self-sustainability or take charge of marketing eggs, vegetables, chickens or ducks. This will help them to take economic responsibility for the community.

On the other hand, each semester they will bring piggy banks to their homes so that family, neighbors and friends can contribute to their education.

## **Evaluation**

Evaluation is a continual process the whole time during the year. It is an instrument through which formators and pre-novices are able to see the progress made by them during the year in matters of spiritual, personal, and academic development as well as proper identity with the Carmelite lifestyle. Nonetheless, there is an annual formal evaluation of each pre-novice at the beginning of March (using the criteria in Appendix 5, “Readiness for Novitiate, (p. 72) It is expected that each pre-novice must complete the evaluation in a month. The process has three parts:

1. The provincial will meet with each potential novitiate candidate as a way of motivating and getting to know the candidate and his intentions for the novitiate.
2. Each pre-novice prepares a written self-evaluation, using Form J – “Pre-Novitiate Evaluation.” He also prepares an evaluation of his peers, using Form J – “Pre-Novitiate Evaluation.” He then meets with each pre-novice to discuss these written evaluations.
3. The director prepares a written evaluation and shares it with the pre-novice and reviews the pre-novice’s self-evaluation.

## **Sharing of Information and Evaluations**

As each student completes a level of formation, e.g., going from the pre-novitiate to the novitiate, or leaving the novitiate as a simply professed friar, the formation director of the place he is leaving shall write up an honest evaluation of the person. This evaluation shall note both the strengths and gifts of the student, along with a frank description of his difficulties and a listing of the areas in which he needs to grow if he is to be a good candidate for our way of life. This evaluation shall be placed in the student’s file, which is sent first to the Provincial Office and then to the director of the next level of formation.

It is highly recommended that, in addition to writing such a report, the two directors of the levels involved should meet with one another to discuss the student in all his aspects. This discussion should be frank, open, straightforward, and complete. Being honest in this situation will be helpful to the student and to those working as formators. This conversation should also take place between the formators and intern directors.

## **Praesidium**

At each level of formation, men in formation must adhere to the standards of the accreditation program by Praesidium, Inc. (See Appendix 8 – “Praesidium, Inc.,” p. 78) and participate in the training and updating in a timely manner.

## **Departure from Community**

If a student is asked to leave the formation program, or if he decides to withdraw from the program,

the formation director will write a one-page summary outlining the reasons for his departure from the program as well as a recommendation whether he should be re-admitted to the program at a future date. If the student applies to any other seminary or house of formation, there will be a sharing of information as deemed appropriate by the Provincial with the diocese, religious community or seminary. A copy is to remain in the provincial archives or other suitable place, along with any other material according to provincial guidelines, until such time that it is highly unlikely the student will be reapplying to another diocese, religious community or seminary.

## **WHITEFRIARS HALL - PCM RESIDENTIAL PRE-NOVITIATE**

### **Carmelite Studies Program & Orientation**

The pre-novitiate begins in August prior to the Carmelite Studies Program and is followed by an orientation to the formation program at Whitefriars and registration for academic studies at The Catholic University of America. During this orientation, the pre-novices are guided through various aspects of the formation process:

- The formation process: one-to-one sessions, group, spiritual direction, etc.
- The house schedule, house jobs, responsibilities, policies, etc.
- The Liturgy—Celebrating the Liturgy of the Hours and the Eucharist in the community
- Study the PCM Province's *Policies for Maintaining Ethical Ministries with Minors and Adults*.

### **Formation-Related Experiences**

Regularly scheduled meetings will be provided for the study and reflection on Carmelite topics chosen from *Carmelite Formation: A Journey of Transformation (Ratio Institutionis Vitae Carmelitanae—RIVC, 2013)*.

In the Fall Semester, the topics are those that will help the pre-novice develop an appreciation of the Carmelite charism, prayer, and community life:

- Reading the RIVC, Parts One & Two
- Introduction to community life
- Introduction to the Carmelite Rule
- Psychological report feedback and review
- The liturgical cycle

In the Spring semester, the topics are those that deal more directly with the charism:

- *Seasons of the Heart: The Spiritual Dynamic of the Carmelite Life*
- Elijah as presented in I & II Kings
- Mary as taken from *Lady of the Place*

Regular formation-related meetings:

- Lectio Divina (weekly)
- Group (5 sessions per semester)

- House Meetings (monthly and as needed)
- Carmelite topics—Provincial & General Chapter documents, Prior General's Letters and other related documents

In addition, the pre-novices may attend other programs as available on topics such as transitions, celibate sexuality, multiculturalism, and family of origin.

### **Academics**

During his pre-novitiate time, each pre-novice needs to meet the following academic requirements (or its foreign equivalent) for further stages of formation:

- A bachelor's degree—if incomplete
- 30 credit hours in Philosophy
- 12 credit hours in Theology & Religious Studies
- English proficiency (working towards a score of 600 on the TOEFL exam prior to his entrance to the novitiate) or completion of the Intensive English Program at CUA
- English dominant students, unless they need Special English will take a full schedule in philosophy, theology and religious studies according to the *Program of Priestly Formation* (PPF, 5th Edition).

Besides the above requirements, introductory courses in scripture and theology are recommended. During the pre-novitiate period, each pre-novice is expected to complete, insofar as possible, without unnecessarily prolonging the length of the pre-novitiate, the academic admission requirements for The Catholic University of America.

Each pre-novice's academic schedule is determined by the pre-novice, the pre-novitiate director and the academic advisor at his school.

Summer plans for all candidates will be worked out in consultation with the provincial and the pre-novitiate director.

### **Finances**

Medical coverage will be provided according to the requirements of CUA.

Charges for counseling and spiritual direction are assumed by the province.

Each pre-novice is provided with a monthly allowance and is expected to live within this amount.

If the pre-novice has brought his own automobile, it is to be disposed of (sold, given to family, or donated) before he enters the novitiate.

### **Tuition**

The student is responsible for his educational costs (tuition and books) if he is working towards a bachelor's degree. This can be done via gifts, grants, and student loans. The province will assume the responsibility of the loan payments while the student is with us (as well as the loan payments of any educational loans received prior to admission). If the student enters with a bachelor's degree and/or is taking ESL, or undergraduate philosophy credits (pre-requisite for studying graduate theology), or graduate theology, then the province assumes these educational costs.

If the pre-novice is enrolled in academic courses and he has outstanding student loans, he will be expected to apply for loan payment deferments. Note: The provincial treasurer will need to be notified as soon as possible if his loans are from a Canadian source.

## **Evaluations**

There is an annual formal evaluation of each pre-novice beginning at the latest in early March (using the criteria in Appendix 5 “Readiness for the Novitiate”). It is expected to be completed in one month.

The process is four-fold:

1. Each pre-novice who is potentially ready to enter the novitiate meets with each solemnly professed member of the community for a dialogue regarding the candidate’s readiness to enter the novitiate.
2. Each pre-novice prepares a written self-evaluation, using Form J – “Pre-Novitiate Evaluation.” He also prepares an evaluation of his peers, using Form J – “Pre-Novitiate Evaluation.” He then meets with each pre-novice to discuss these written evaluations.
3. The director prepares a written evaluation and shares it with the pre-novice and reviews the pre-novice’s self-evaluation.
4. The director meets with the House Chapter to discuss those pre-novices petitioning for entrance to the novitiate. If the provincial is not present for the House Chapter, the director discusses his evaluation of the pre-novice’s readiness for the novitiate and the discussion of the House Chapter with the provincial who then meets individually with each pre-novice.

## **Decision of Admission to Novitiate**

The results of the written evaluations and the discussion and vote of the House Chapter are given to the provincial who makes the final decision about admitting the candidate. Although there should be no surprises in light of the above process, the director informs the pre-novice of the decision of the provincial.

Other policies and procedures for the pre-novitiate are contained in the “Pre-Novitiate Handbook,” given to each pre-novice at the beginning of the academic year.

## **Sharing of Information and Evaluations**

As each student completes a level of formation, e.g., going from the pre-novitiate to the novitiate, or leaving the novitiate as a simply professed friar, the formation director of the place he is leaving shall write up an honest evaluation of the person. This evaluation shall note both the strengths and gifts of the student, along with a frank description of his difficulties and challenges, including a list of the areas in which he needs to grow if he is to be a good candidate for our way of life. This evaluation shall be placed in the student’s file, which is sent to the director of the next level of formation and then to the provincial office.

It is highly recommended that in addition to writing such a report, the two directors of the levels involved should meet with one another to discuss the student in all his aspects. This discussion should be frank, open, straightforward, and complete. Being honest in this

situation will be helpful to the student and to those working as formators. This conversation should also take place between the formators and intern directors.

## **Praesidium**

At every level of formation, the student will adhere to the standards of the Praesidium, Inc., the accreditation program to which the PCM Province belongs (cf. *Policies for Maintaining Ethical Ministries with Minors and Vulnerable Adults*, 2017) and participate in the program's trainings and updating in a timely manner. (Cf. Appendix 8 – "Praesidium, Inc.")

## **Departure from Community**

If a student is asked to leave the formation program, or if he decides to withdraw from the program, the formation director will write a one-page summary outlining the reasons for his departure from the program as well as a recommendation whether he should be re-admitted to the program at a future date. If the student applies to any other seminary or house of formation, there will be a sharing of information as deemed appropriate by the provincial with the diocese, religious community, or seminary. A copy is to remain in the provincial archives or other suitable place, along with any other material according to provincial guidelines, until such time that it is highly unlikely the student will be reapplying to another diocese, religious community, or seminary.

## **CASA DEL CARMEN – RESIDENTIAL PRE-NOVITIATE IN MEXICO CITY**

### **Entrance Procedure**

Each candidate must have completed secondary school (Preparatoria) before entering the program. It is very desirable that the candidate may have completed at least two years of higher education (Universidad). The duration at this level must not be more than two years in which candidates will achieve the philosophy credits needed to continue with their theological studies; as well as the achievement of the personal maturity and integration necessary to move on to the novitiate. All candidates must report the last Sunday of July to participate in retreat and a week of orientation.

### **Orientation Program**

The orientation program lasts for a week. During this period of time the pre-novices will complete their enrollment to the schools they are attending. These are some of the topics presented during orientation:

- Pre-novitiate handbook
- Carmelite charism
- The OCD presence in the Mexico metropolitan area
- Formation process – face-to-face, group, spiritual direction
- House schedule, house responsibilities, house politics, etc.
- Study the PCM Province's *Policies for Maintaining Ethical Ministries with Minors and Adults*.

## Monthly workshops and Other Formation Moments

Each month there will be a weekend-long workshop to cover the topics suggested by the *Ratio* (i.e., Part 3 of the *RIVC*, Rome, 2013).

During the fall semester, these will be the topics:

- Family Systems and Assertive Communication for Community life
- Intra-Carmelite Student Gathering
- Enneagram
- Introduction to the Rule
- Liturgy and Prayer

During the spring semester, these will be the topics:

- Affectivity and Sexuality
- Elijah and Mary in Scripture (the prophetic dimension)
- *Seasons of the Heart*, by John Welch, O.Carm.
- History of the Province
- Lenten Retreat
- Vision of Reality in a Global Scale / Sensibility to ecology, peace, and justice

Other monthly formation events will be:

- First Monday of the month: Group
- Second Monday of the Month: Community Meeting
- Third and Fourth Mondays of the month: Carmelite Formation

## Academics

During their time at Casa del Carmen, candidates need to accomplish the following academic requirements:

- Finish a bachelor's degree (if the candidate has two years of university)
- A Baccalaureate in philosophy (two years program)
- Certificate Degree in Spirituality at CEVHAC (if the candidate already has the philosophy or theological requirements)
- Full-time theology academic load (if the candidate already has the philosophy requirements)

Some extracurricular activities are highly recommended during the pre-novitiate. Activities such as:

- English
- Guitar/music
- Sports
- Art

During the period of the pre-novitiate, it is expected that each pre-novice completes the admission requirements to enter the IFTIM without the need of extending it beyond this period of two years. The academic calendar of each pre-novice is determined between the pre-novice, the director of



formation and the school's academic advisor.

Summer plans for all men in formation are arranged by consulting the Provincial and the Pre-novitiate director.

### **Finances**

Candidates will provide for their own medical expenses, if possible.

The province will provide counseling and spiritual direction fees.

If the pre-novice has brought his own car, it is to be disposed of (sell or donate it) before he enters novitiate. In the meantime, at the novitiate, the car will become part of the community fleet.

### **Tuition**

The province will pay all academic fees and educational expenses. The student is expected to apply for student loans, scholarships, and grants.

### **Evaluations**

Evaluation is a continual process the whole time during the year. It is an instrument through which formators and pre-novices are able to see the progress made by them during the year in matters of spiritual, personal, and academic development as well as proper identity with the Carmelite lifestyle. Nonetheless, there is an annual formal evaluation of each pre-novice at the beginning of March (using the criteria en Appendix 5, "Readiness for Novitiate, (p. 72) It is expected that each pre-novice must complete the evaluation in a month. The process has three parts:

1. Each pre-novice will prepare a written evaluation of each of his peers using Form J – "Pre-Novitiate Peer Evaluation and Self Evaluation" (p. 104). Then they will meet individually with each one of the pre-novices to discuss the written evaluation. He will also do a self-evaluation using the same form and give it to his formator.
2. The pre-novice who wrote the evaluations will turn it in to the Director of Pre-novices on the appointed date.
3. The Director of Pre-novices will prepare a written evaluation for each of the pre-novices based in part on the peer evaluations and will share it with the pre-novice.

If the pre-novice is potentially ready to enter novitiate:

1. He will meet with each one of the professed members of the community to dialogue about the readiness of the candidate to enter novitiate.
2. The Director of Pre-Novices, the professed members of the community and the Prior Provincial will meet to discuss those pre-novices being prepared to enter novitiate ("House Chapter").
3. The written evaluations are presented in the House Chapter and the community is pooled if the pre-novice may or may not proceed to novitiate.

4. Even though there should not be any surprises in the light of this evaluation process, the Director informs the pre-novice of the decision of the Provincial.

There are other policies and procedures in “Manual de Casa del Carmen,” which is given to each pre-novice at the beginning of the academic year.

### **Sharing of Information and Evaluations**

As each student completes a level of formation, e.g., going from the pre-novitiate to the novitiate, or leaving the novitiate as a simply professed friar, the formation director of the place he is leaving shall write up an honest evaluation of the person. This evaluation shall note both the strengths and gifts of the student, along with a frank description of his difficulties and a listing of the areas in which he needs to grow if he is to be a good candidate for our way of life. This evaluation shall be placed in the student’s file, which is sent first to the Provincial Office and then to the director of the next level of formation.

It is highly recommended that, in addition to writing such a report, the two directors of the levels involved should meet with one another to discuss the student in all his aspects. This discussion should be frank, open, straightforward and complete. Being honest in this situation will be helpful to the student and to those working as formators. This conversation should also take place between the formators and intern directors.

### **Praesidium**

At each level of formation, men in formation must adhere to the standards of the accreditation program by Praesidium, Inc. (See Appendix 8 – “Praesidium, Inc.,” p. 78) and participate in the training and updating in a timely manner.

### **Departure from Community**

If a student is asked to leave the formation program, or if he decides to withdraw from the program, the formation director will write a one-page summary outlining the reasons for his departure from the program as well as a recommendation whether he should be re-admitted to the program at a future date. If the student applies to any other seminary or house of formation, there will be a sharing of information as deemed appropriate by the Provincial with the diocese, religious community or seminary. A copy is to remain in the provincial archives or other suitable place, along with any other material according to provincial guidelines, until such time that it is highly unlikely the student will be reapplying to another diocese, religious community or seminary.

## THE NOVITIATE

### Brandsma Priory

#### Purpose

The novitiate program initiates the novice gradually to the religious life. He is invited to walk with us in the life of the Spirit and to deepen the experience of his call to conversion, simplicity, faith, hope and love. The purpose of this year is twofold. First, it enables the novice to embrace the following of Jesus Christ through living the vows of obedience, poverty, and chastity according to the Carmelite charism. Second, it prepares the novice to make a decision in faith about the future direction of his life “with a view to a first commitment through simple profession.”<sup>21</sup>

It is in living a life of faith in prayer, community and ministry that the novice discovers the value and meaning of the Carmelite charism, “whether he recognizes it in himself, whether he has experienced it and whether he has begun to identify with the Province and with the Order.”<sup>22</sup> This life experience gives the novice the time and space he needs to deepen his inner journey with God and, from that foundational relationship of love, re-read and assume his story of sin and grace as he makes a decision about his vocation.

“The consecrated life is not something isolated and marginal, but a reality which affects the whole Church.” It is “at the very heart of the church as a decisive element for her mission, since it ‘manifests the inner nature of the Christian calling.’” It is also “a precious and necessary gift for the present and future of the people of God, since it is an intimate part of her life, her holiness and her mission.”<sup>23</sup> It is a way of opening the depths of one’s heart to the full power of the Gospel and to the grace first granted at Baptism. It is important to remember that “the first duty of the consecrated life is to make visible the marvels wrought by God in the frail humanity of those who are called.”<sup>24</sup>

To live this life requires prayer, simplicity of life, and the willingness to live in relationship with others. The novitiate seeks to provide the novice the time and space he needs to enter this life and live it fully in order to discern his suitability for the vowed life as a Carmelite.

#### Program-Process:

##### 1. General:

The candidate entering the novitiate will normally have lived in a Carmelite community for at least one academic year before he is officially accepted into the novitiate by his Provincial “...in accordance with the norms of Canon Law and of the *Ratio Institutionis Vitae Carmelitanae*, when they have reached an awareness of being called by God and have been judged suitable.”<sup>25</sup> He is expected to have reached a level of growth and development as described in the section, “Readiness

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<sup>21</sup> RIVC, no. 90

<sup>22</sup> RIVC, no. 99

<sup>23</sup> *Vita Consecrata: On the Consecrated Life and Its Mission in the Church in the World*, Apostolic Letter of Pope John Paul II, Rome, 1996, (henceforth VC), no. 3

<sup>24</sup> VC, no. 20

<sup>25</sup> Carmelite Constitutions, no. 147

for the Novitiate” of this *Formation Manual* (Appendix 5, p. 72). It should be kept in mind that “the first questions we ask are whether the candidate shows the signs of a vocation and whether he appears to have the human and Christian qualities required to live this life. It is important to be very clear from the beginning: if signs of a non-authentic or misdirected vocation are noticed, we must direct the candidate to his proper path.”<sup>26</sup> Candidates arrive at Brandsma Priory, in Middletown, NY, no later than the first Sunday of June. They then begin a five-day retreat. After completing the retreat, they are received into the novitiate on the evening of the second Sunday in June and are invested with the brown habit. The ceremony for the beginning of novitiate is very simple and takes place in the context of Evening Prayer. It is a celebration of the Carmelite community. Hence, only Carmelite friars should attend.

The expectation or goal for a novice over the span of his novitiate year is that he be responsible for his participation in the life of his community and in the novitiate program, so that he can prepare himself for a decision with regard to a vowed life within the Carmelite community. He should keep in mind that his “primary goal, beyond the profession which he will make at the end of the year of novitiate, is a constant commitment to conversion, which is to last throughout his life and open him to the possibility of transformative union with God so that he may bear witness coherently to God’s presence in the world.”<sup>27</sup>

The novitiate is established as a primary community with its own schedule, program, and budget. Other professed members who may live in the novitiate community share fully in the life and spirit of the novitiate by their participation and interaction with the novices.

Faith life is shared through daily living and daily Eucharist, the Office of Readings, Morning and Evening Prayer and *Lectio Divina* when it is done as shared prayer. Since prayer is so important a practice for an inner journey as well as “the door to contemplation” (Saint Teresa of Avila), the novices, as well as the professed members of the community, are asked to spend at least one hour each day in personal solitary prayer.

The natural tension between the personal inner journey and community life “must be dealt with and resolved as a call to us all to journey together as brothers.”<sup>28</sup> Working, praying, and recreating together and alone are part of this integration process.

Today, those who come to the novitiate come from a variety of cultures and languages. This reality is part of the challenge of forming a community. “Our lifestyle, which must be open and welcoming, invites us to share with others the communion of hearts and the experience of God which are lived within the community.”<sup>29</sup> Such openness has to be other-directed and involves dying to oneself. The emphasis must be on the faith that unites all in the Church. In this way, an authentic spirituality of communion, which the Holy Father recommends, is necessary.<sup>30</sup> In addition, it must be kept in mind that “every culture into which we integrate ourselves will enrich both our own understanding

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<sup>26</sup> RIVC, no. 89

<sup>27</sup> RIVC, no. 97

<sup>28</sup> RIVC, no. 41

<sup>29</sup> RIVC, no. 47

<sup>30</sup> Cf. *Novo Millennio Inuente, At the Beginning of the New Millennium*, Apostolic Letter of Pope John Paul II, Rome, 2001, nos. 43 and 28ff

of the gospel message and of our charism.”<sup>31</sup> In the course of the year, situations arise spontaneously where one or another culture comes to the fore. In addition, there are cultural events planned by the novices themselves according to the cultural make-up of the novitiate community. Also, classes and workshops on multi-cultural issues can be presented.

These external efforts, important as they are, are only part of a spirituality of communion. They need to be complemented by the more challenging inner work of each person to value his own and others’ culture. Only in this way will true conversion and integration be advanced. The diversity of cultures is an invitation to conversion. It can be an opportunity for transformation. This process has been described as a movement from the ethnocentric states of denial, defense, and minimization towards the ethno-relative states of acceptance, adaptation, and integration.<sup>32</sup>

Each novice is in close relationship with the novice director(s). Such a relationship develops through personal dialogues (one-to-ones) and living together in community. In this context the novice is challenged to continue his growth in faith and in his understanding of what being a Carmelite means. It is important to remember “the task of building community is a form of asceticism which requires continuous conversion and a sense of self-denial. No one presumes too much of the others, while each rejoices in what the others are capable of giving.”<sup>33</sup>

Usually, the novices will meet formally each week as a group. The agenda for these meetings alternates week by week. One week they meet to discuss house business and community concerns with the formation directors. The next week the meeting is devoted to group process, which is conducted by an outside facilitator. The purpose of this meeting is to foster communication and to develop skills for living community life. The hope is to develop an atmosphere of trust and to enhance the quality of community life leading to a greater understanding and appreciation of each person.

## 2. Studies Program

Keeping in mind that “the novitiate is neither a continuation nor a new kind of school,” but that “it is a process in which theory and praxis interact, each shedding light on the other,”<sup>34</sup> the novices follow a yearlong studies program in order to gain a thorough foundation in the Carmelite charism.

A. During the year, the director(s) conducts classes using pertinent themes from the *Ratio* (i.e., Part 3 of the *RIVC*, Rome, 2013), the Carmelite Spiritual Directory Project or some other suitable Carmelite or spiritual subject.

B. During the year, various presenters come to speak on different aspects of being a religious and being a Carmelite. As the novice begins to adjust to new people, to a new place and a new state in life, these presenters provide an introduction to the diversity and complexities of Carmelite life. They also incarnate that life in their very person. Topics during this time include History of the

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<sup>31</sup> *RIVC*, no. 48

<sup>32</sup> A good discussion of this, i.e., the “Developmental Model of Intercultural Sensitivity” by Milton J. Bennett, can be found in [The Wolf Shall Dwell With the Lamb: a Spirituality for Leadership in a Multicultural Community](#) by Eric Law, Chalice Press, Saint Louis, 1993.

<sup>33</sup> *RIVC*, no. 41

<sup>34</sup> *RIVC*, no. 98

Carmelite Order and of the Provinces, Prayer, the Vows, major Carmelite saints and other important Carmelite persons and texts, spirituality, and issues in the Church.

C. The novices participate in the 2-part Carmelite Studies Program. One session is held for a week in August; the other is held near the first weekend of January. The usual site for the Program is Whitefriars Hall in Washington, DC.

### **3. Ministry**

From September to May, the novices are involved in no more than six hours of ministry each week, including preparation time. This ministry experience provides the opportunity to reflect on the mission of the Church, as well as the novice's own ability to take up that mission and integrate it into a contemplative lifestyle. In choosing these ministries, attention should be given to ones that provide direct experience with working with the marginalized and the poor.

Those students who come from countries where it is not possible to fulfill the requirements of Praesidium (i.e., background checks, psychological testing) can only minister under supervision until such a time these requirements can be fulfilled. This supervision can be done in the one-to-one sessions with their respective formator, by an on-site supervisor and through the annual written evaluations of each student.

### **4. The Sexual and Affective Dimensions of Life: Toward Human Integration**

The human and spiritual dimensions of human sexuality and affectivity are an important part of the lifelong inner journey of every human being. The novices are invited to re-read and assume their sexual and affective story. Parts of the program of the Conference of Major Superiors of Men, *Men Vowed and Sexual: Conversations About Celibate Chastity* (1993), have been helpful in the past. The novices are expected to work toward integrating their human life as they talk about the significant people, their impact on them, the healing process that might have been involved, and how they may have influenced their vocational story. The novices also participate in a Sexuality Workshop. In addition, at the beginning of the novitiate, the *Policies for Maintaining Ethical Ministries with Minors and Adults* is reviewed. The novices also attend the on-going formation programs in both provinces that are directed to the accreditation requirements of Praesidium.

### **5. The Desert Experience**

“In the footsteps of the first Carmelite hermits, we too journey through the desert, which develops our contemplative dimension. This requires self-abandonment to a gradual process of emptying and stripping ourselves, so that we may be clothed in Christ and filled with God. This process ‘begins when we entrust ourselves to God, in whatever way he chooses to approach us.’”<sup>35</sup> Keeping in mind that “we do not enter the desert by our own will”<sup>36</sup> the novices and directors make a ‘Desert Experience’ during the Season of Lent. The Desert Experience takes place within the context of normal community living. The purpose of such an experience is to encourage growth in intimacy with God, with oneself and with others. In the context of this intimacy, the novice is asked to make

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<sup>35</sup> RIVC, no. 32 and Carmelite Constitutions (1995), no. 17-18.

<sup>36</sup> Ibid.

a decision about his readiness to live according to the vows of obedience, poverty, and chastity as a professed Carmelite friar.

The specific objectives of this period of the novitiate year are the following:

- To experience the need for the Lord, the demands of trust in Him and the freedom which surrender to Him brings;
- To grow in the awareness of the strength and weaknesses one has in his relationship with God, with others, and with oneself;
- To articulate one's personal spirituality and use it as a foundation for making a decision about profession; and
- To develop, in consultation with his one-to-one person, a personal spiritual project that will aid the novice in achieving the goals of the Desert Experience. This may include an in-depth study of the Scriptures or of a Carmelite author. It could also include the study of a document of the Order. At the end of the Desert Experience, the novice will discuss with his director what he had gained as a result of this project.

The Desert Experience is enhanced by increased periods of silence and solitude, day and night. One refrains from using radios, television, the Internet and stereos, etc. during this period, as well as advising frequent callers and others to respect this special time. All this is to ensure that there is an increased amount of time and space for the novice to enter deeply into his inner journey through meditation, prayer, and the study of Carmelite spiritual literature. Journal keeping also becomes a means of participating in the Desert Experience.

## **Evaluation**

Evaluation is an on-going process during the novitiate year. There are two levels of evaluation: formal evaluations (novices, novice director and Provincials) and peer evaluations.

### **1. Formal Evaluations**

There are three formal evaluations. The first takes place in September. The second takes place in December at which the Priors Provincial take part. The last evaluation in March is focused on discerning the novice's readiness to take vows. The director presents an evaluation of each novice to the Provincial and to the novice. This is the time to ask questions, share insights and give affirmations and suggestions. The Provincial meets with the individual novice during the December and March evaluations.

At the request of either the Prior Provincial or the novice director, there may be an additional evaluation before the final one.

### **2. Peer Evaluations**

There are three peer evaluations: the first two take place around the third month and the sixth month respectively in the following manner: a.) Each novice is asked to evaluate his fellow novices in writing, following guidelines presented by the director; b.) Upon receiving the written evaluation, the novice meets with each of his peers; c.) Having received feedback from his peers, the novice writes a self-evaluation; and d.) Finally, the novice meets with the director in order to discuss the

evaluations. The third and final peer evaluation takes place around March. It follows the same procedure but is also a transitional meeting where the growth of each novice over the entire year is remembered and affirmed.

### **Policy for Simple Profession**

After the final evaluation (see previous section), which focuses on the readiness of the novice to make a decision about profession, the novice is free to petition his Prior Provincial for vows in writing. The recommendations of the novice director are presented to the respective Provincials at this time. The Prior Provincial, “after examining the novice director's report and hearing the local chapter, shall decide on the matter with a deliberative vote from his Council.”<sup>37</sup> Upon approval, the novice will be admitted to temporary vows. A copy of the novice's petition for vows shall be placed in his file.

Prior to the profession of vows, towards the end of the novitiate, each novice will make a retreat in preparation for professing vows. The director will determine the time and place for this retreat.

The ceremony for simple profession of vows normally takes place on the Monday after the second Sunday in June. It is held at the National Shrine of Our Lady of Mt. Carmel in Middletown, NY. To make profession is to embark on a new and special way of life, calling on Christ to bring the work to completion. The ceremony is meant to be festive, yet simple. Hence announcements, programs, music, and decorations should all reflect this emphasis. Attendance is limited to Carmelites, friends of the Carmelite community and to members of the novice's family.

### **Responsibilities of the Novice Director**

The novice director is entrusted by the Province of the Most Pure Heart of Mary and the Province of St. Elias with the primary responsibility of accompanying the novices toward the achievement of the purpose of the novitiate. In their day-to-day living with the novices, the immediate object of their attention is the life experience of these men in the areas of faith, prayer, community, and ministry. The director must “accompany the novices along the journey of transformation, helping them to discern the signs of the action of the Spirit in their lives, and to acquire and develop a contemplative attitude.”<sup>38</sup> The director seeks to support their growth by: a.) Sharing the community life at Brandsma Priory, b.) Participating in their program of studies, c.) Evaluating the novices, and, above all, d.) Engaging in personal dialogue (one-to-one meetings) with each novice. The document, *Vita Consecrata*, identifies personal dialogue as the chief instrument of formation. It says that personal dialogue is “a practice of irreplaceable and commendable effectiveness which should take place regularly and with a certain frequency.”<sup>39</sup> In our program these personal dialogues with each novice usually take place every two weeks.

Since “the principal responsibility for formation lies with the novice” himself,<sup>40</sup> the director accompanies more than directs. The novice's willingness to take the initiative for his participation

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<sup>37</sup> RIVC, no. 100; Carmelite Constitutions, no. 160; Canon, no. 656, 3°

<sup>38</sup> RIVC, no. 92

<sup>39</sup> VC, no. 66

<sup>40</sup> RIVC, no. 91



in our life and for the integration of its various dimensions in his personal life is a clear gauge of the desired growth for which the novice director is seeking.

The responsibility and initiative begin with the novice's experience of living in our community. The director seeks to help the novice articulate that experience, to identify the challenges it presents to him and the obstacles he experiences. He also affirms the growth that takes place in the way the novice relates to the various members of the community.

The heart of our life is contemplation.<sup>41</sup> "However, it is important to speak specifically about prayer, which is the door to contemplation."<sup>42</sup> The director encourages the novice's growth in this foundational relationship by providing him with the opportunity to discuss it with them. In addition, he discusses his attentive listening to the Word<sup>43</sup> in his prayer, study, reflection, and his participation in group *Lectio Divina*. The novice's experience of the liturgical life of the community is discussed, i.e., what liturgy means to him, how he translates it into the other dimensions of his life and the steps he is taking to both increase his participation in it and the fruit it bears in his life. To deepen this process, the novice is also asked, "to choose an appropriate spiritual director in consultation with the formator."<sup>44</sup>

The director seeks to provide an atmosphere of silence and solitude in the novitiate. They challenge and support the novice to contribute to that atmosphere in general and by specific norms. The director encourages the novice's efforts to grow in his appreciation for the necessity of silence and solitude as an aid in his continual growth in relationship with the Lord.

The director assists the novice to reach out beyond himself and the community in some form of ministry. Such assistance comes in the form of helping him identify his strengths and weaknesses in relating to people in ministry and encouraging him in his efforts to turn his weaknesses into strengths. At the same time, the director points out that ministry might help the novice deal with his own limitations because "the authentic contemplative journey allows us to discover our own frailty, our weakness, our poverty – in a word – the nothingness of human nature: all is grace. Through this experience, we grow in solidarity with those who live in situations of deprivation and injustice. As we allow ourselves to be challenged by the poor and by the oppressed, we are gradually transformed, and we begin to see the world with God's eyes and to love the world with his heart."<sup>45</sup>

Relationships are at the heart of the Christian life: relationship with God and relationship with others. The director encourages the novice to reread his relationships both within and outside of the community, with men as well as with women. He explores with him his experience and understanding of these relationships and the meaning they have in his life as a religious. The novitiate is the beginning of religious life.<sup>46</sup> The director seeks to develop a positive attitude toward change and growth in the novice, which this new form of life entails, to enable him to see the hand

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<sup>41</sup> RIVC, no. 28

<sup>42</sup> RIVC, no. 34

<sup>43</sup> RIVC, no. 37

<sup>44</sup> RIVC, no. 98, b, 4

<sup>45</sup> RIVC, no. 52

<sup>46</sup> RIVC, no. 90

of the Lord in the events and people of his life, and to help him strengthen his commitment to respond to God in faith.

## **Finances**

Because of the joint nature of the Inter-Provincial Novitiate Program, the novitiate operates on its own budget to which both Provinces contribute. The procurator of Brandsma Priory prepares a budget that contains expenses for room and board, monthly budget, education, ordinary living costs, etc. The budget is then sent to the two Provincial Procurators who then submit it for approval by the Provincial Councils. Each Province contributes to the budget according to the number of novices it has present in the novitiate that year.

In order to facilitate the house treasurer's task and encourage personal responsibility, a monthly allowance is provided to each novice for his personal needs.

Capital improvements of Brandsma Priory are undertaken by the Saint Elias Province through the Provincial Procurator of the Saint Elias Province.

## **Transitions**

If the next assignment of the novice begins shortly after profession, then the newly professed becomes the responsibility of the local community and supervisor as soon as he arrives. If there is a short lapse of time between the profession and the beginning of internship or theological studies, then the plan spells out who is responsible for the newly professed during this interim period and whose budget will support the man during this period.

In some cases, e.g., school community, the assignment may not begin until the end of the summer. In these cases, there should be an outline of the summer agenda for the newly professed. This plan should be in place as soon as possible after the Desert Experience. It should clearly spell out who is responsible for the summer activities and funding of the newly professed. It should take into account 1) when the assignment begins, 2) who will accompany the newly professed until that assignment begins, and 3) budget concerns.

The newly professed will receive an allowance and a vacation allowance from the novitiate for the months of June and July. Their August allowance will be the responsibility of the intern site or Whitefriars Hall.

## **Sharing of Information and Evaluations**

As each student completes a level of formation, e.g., going from the pre-novitiate to the novitiate, or leaving the novitiate as a simply professed friar, the formation director of the place he is leaving shall write up an honest evaluation of the person. This evaluation shall note both the strengths and gifts of the student, along with a frank description of his difficulties and a listing of the areas in which he needs to grow if he is to be a good candidate for our way of life. This evaluation shall be placed in the student's file, which is sent first to the Provincial Office and then to the director of the next level of formation.

At the end of the Novitiate, the SEL Novice Director will facilitate the orderly transport of the

traveling file for the newly Professed SEL friar over to the Provincial office and oversee its transfer to the Prior Provincial who will henceforward transmit the traveling file to the newly Professed friar's next designated formation site. The PCM Novice Director will continue to send the traveling file for the newly professed PCM friar to the friar's next designated formation site.

It is highly recommended that, in addition to writing such a report, the two directors of the levels involved should meet with one another to discuss the student in all his aspects. This discussion should be frank, open, straightforward, and complete. Being honest in this situation will be helpful to the student and to those working as formators. This conversation should also take place between the formators and intern directors.

### **Praesidium**

At every level of formation, the student will adhere to the standards of the Praesidium, Inc., accreditation program (see Appendix 8 – “Praesidium, Inc.,” pg. 78) and participate in the program's training and updating in a timely manner.

### **Departure from Community**

If a student is asked to leave the formation program, or if he decides to withdraw from the program, the formation director will write a one-page summary outlining the reasons for his departure from the program as well as a recommendation whether he should be re-admitted to the program at a future date. If the student applies to any other seminary or house of formation, there will be a sharing of information as deemed appropriate by the Provincial with the diocese, religious community or seminary. A copy is to remain in the provincial archives or other suitable place, along with any other material according to provincial guidelines, until such time that it is highly unlikely the student will be reapplying to another diocese, religious community, or seminary.



## **THE CARMELITE INTERNSHIP**

The Carmelite internship is an opportunity for the professed Carmelite student to experience community living in a Carmelite house other than a house of formation and to participate in the life and ministry of that community as part of discernment process. It is a supervised experience. The Carmelite intern is helped to assess his developing maturity, his identification with the Carmelite community, his performance in the role of minister, and his integration of the initial formation experience within a different life setting. Important practical skills are acquired as the student perceives how theology, the tradition of the Church and our Carmelite charism shed light on community living and on contemporary pastoral situations. Through prayer, participation in the life of the local community and supervision, the intern's pastoral and community experience is integrated with the rest of his life.

In most cases, the duration of the internship is a minimum of one year and a maximum of two. The decision about the duration of the internship belongs to the Provincial in consultation with the Council, having listened to the intern, his supervisor, the local community, and intern director.

### **Placement**

The internship placement process starts after the ninth month novitiate evaluation. The novitiate formators begin the dialogue with the novices, the Provincials and their Councils, and the intern directors about possible placements in the respective Province for the future intern or whether the novice would benefit from a year of theological education. If the recommendation is for a year at Whitefriars Hall, then the process for an internship placement occurs during the second semester at Whitefriars. The process then follows the procedure for any other assignment in the Province safeguarding regular community life and proper supervision in the ministry.

Once the placement has been made the intern director will communicate with the prior of the local community and the designated supervisor to review the responsibilities of the community regarding the intern. In consultation with the formation team and with the principal/pastor he will make recommendations about the teaching/ministry of the intern based on the needs and skills of the new intern and the placement.

Professional preparation and ongoing professional development are expected of interns as they are of any member of the Province involved in ministry. Determination of appropriate preparation and ongoing development will be worked out by the principal/pastor, supervisor, the intern director, and intern.

In the PCM Province, the guidelines provided in Appendix 7 – “Internship - in a Secondary School” (pg. 76) will be followed in all cases where the intern is assigned to a secondary school apostolate.

### **Supervision**

Ordinarily a member of the Carmelite community will be appointed by the Provincial Council as the supervisor. He need not be the prior of the community or the administrator of the placement.

His responsibilities cover four areas:

## 1. Orientation

The supervisor establishes a hospitable milieu for the new Carmelite, acquaints him with the physical surroundings, introduces him to fellow Carmelites and placement personnel, and familiarizes him with the administrative and community procedures and lifestyle of the local community including how financial matters are handled. Generally, the aim of this stage is to provide a sense of welcome and mutual endeavor within an adult learning context.

## 2. Contracting

Together the intern and supervisor establish goals for living in community and working in ministry. For example, community items of concern could be: voting, allowance, common activities and cultural sensitivity. They will list responsibilities and specific activities to be performed in achieving these goals and include vacation and holidays. Mutual expectations also are aired and agendas surfaced so that a learning environment is initiated. The contract becomes a springboard for accountability, support, and reflection. A copy of this contract will be sent to the intern director at a time he specifies and is subject to his review and approval. See Appendix 6 – “Preparing the Internship Learning Contract” (pg. 74) and Form L – “Learning Contract for Internship” (pg. 108).

## 3. Supervisory Session

This session is most important and should be specified in the contract. This biweekly, one hour meeting provides the opportunity for candid discussion and reflection about any aspect of the internship. Conflict may arise within the intern’s routine experiences. The intern’s feelings and understanding about such conflict become significant for the learning and integration process. Agendas for the sessions will be mutually developed but the intern is expected to take the initiative in using the supervisory sessions for his maximum benefit.

## 4. Evaluation

Evaluation is an integral part of the Carmelite internship and is meant to be an aid as well as an assessment. The supervisory session is the ordinary time for evaluation. Both the intern and the supervisor look at their relationship and the goals and tasks of the contract. They review the intern’s strengths and areas for growth, whether in community living or ministry, and assess progress in meeting agreed upon expectations. Emphasis is not merely on functional performance but also on the dynamics underlying behavior. In this manner the intern has a realistic appraisal of his ministerial and communal experience.

### **Written Evaluations**

Annually the intern and supervisor will each present a written evaluation to the intern director. These evaluations will be co-signed. (See Form M, pg. 110) Also annually, the community in which the intern resides will evaluate him and present a written summary of this evaluation to the intern director (see the appropriate section of Form M). In addition, at least a preliminary evaluation should be completed after six months of internship, not later than mid-February, which will be shared with the Provincial.

The intern director will see that this process is clearly communicated and followed. The intern

director will also write a summary evaluation on all input given. This process must be completed at a time specified by the intern director prior to the May Provincial Council meeting so that the information is available to assist in the individual's next assignment.

### **Intern Director**

Each Province will appoint an intern director who will coordinate the Provincial internship program. In the spring the intern directors will plan an annual introductory workshop for the supervisors and interns to introduce and train them in the internship process. The director will monitor the process to enable the supervisors and interns to implement the program.

Annually, the intern director will visit placements in the Province for a review and discussion with the supervisor and intern. Specifically, he will determine whether the four areas of the supervision (see p. 41) are being implemented. The director, in consultation with the local supervisor and intern, will make recommendations to the Provincial Council with regard to summer programs.

The following tasks are some things that may be done as part of the intern director's visitation:

- to meet with the intern and get feedback about how the experience of the ministry and community life is going
- to meet with the supervisor for feedback from his viewpoint about how the intern is doing in both the ministry and the community
- to meet with other significant people in the ministry and community upon the recommendation of the intern, e.g., prior, pastor, department chair, retreat house director, etc. Note: The intern should schedule these meetings.-.
- to visit the intern in activities of the ministry (classroom, youth group meeting, RCIA sessions, etc.) and to spend some time in community with the intern (prayer and liturgy, meals, recreation)
- to remind the intern and supervisor about the yearly formal written evaluations and that copies of these should be sent to the director of formation at Whitefriars Hall
- to the extent possible, finalize the intern's summer plans

### **Finances**

With respect to finances, the intern will generally be treated in the same manner as the other members of the local community. For example, he will receive the same allowance and vacation stipend and expense coverage as the other members of his community. The parish or school is expected to compensate him for his ministry, which will be paid to the local community. The traditions and policies of the two Provinces differ to some degree regarding the specifics of the financing of interns and internship assignments. The intern director will work out the financial details of each intern's assignment with the local community and the provincial procurator at the beginning of the assignment. The financial resources of the local community will be considered in determining the level of its responsibility for the intern. The terms agreed to will be specified in writing and will be communicated to the intern, his supervisor and become part of the intern's file.

The intern's access to an automobile and funds to operate it will be provided by the local community as required for ministry and, to the extent possible, for personal use as well. Interns, however, are

not guaranteed the exclusive use of an automobile either by the local community or the Province. One will be provided whenever it is feasible to do so.

Expenses incurred because of formation requirements, e.g., summer school, travel to formation events and gatherings, etc., will be covered by the intern director or the provincial procurator, according to provincial custom. Such expenses should be cleared with the intern director in advance.

### **Vacation**

Each intern is allowed a vacation each summer according to the Provincial statues or customs. Interns are also allowed some time away during the Christmas break.

### **Sharing of Information and Evaluations**

As each student completes a level of formation, e.g., going from the pre-novitiate to the novitiate, or leaving the novitiate as a simply professed friar, the formation director of the place he is leaving shall write up an honest evaluation of the person. This evaluation shall note both the strengths and gifts of the student, along with a frank description of his difficulties and a listing of the areas in which he needs to grow if he is to be a good candidate for our way of life. This evaluation shall be placed in the student's file, which is sent first to the Provincial Office and then to the director of the next level of formation.

It is highly recommended that, in addition to writing such a report, the two directors of the levels involved should meet with one another to discuss the student in all his aspects. This discussion should be frank, open, straightforward, and complete. Being honest in this situation will be helpful to the student and to those working as formators. This conversation should also take place between the formators and intern directors.

### **Praesidium**

At every level of formation the student will adhere to the standards of the Praesidium, Inc., accreditation program (see Appendix 8 – “Praesidium, Inc.,” pg. 78) and participate in the program's training and updating in a timely manner.

### **Departure from Community**

If a student is asked to leave the formation program, or if he decides to withdraw from the program, the formation director will write a one-page summary outlining the reasons for his departure from the program as well as a recommendation whether he should be re-admitted to the program at a future date. If the student applies to any other seminary or house of formation, there will be a sharing of information as deemed appropriate by the Provincial with the diocese, religious community or seminary. A copy is to remain in the provincial archives or other suitable place, along with any other material according to provincial guidelines, until such time that it is highly unlikely the student will be reapplying to another diocese, religious community, or seminary.

## **WHITEFRIARS HALL: Post-Novitiate Formation**

### **Purpose**

Whitefriars Hall is a religious house of theological studies for students from the Province of the Most Pure Heart of Mary and the Province of St. Elias. The immediate purpose of the post- novitiate program is two-fold: preparation for solemn vows in the Carmelite Order and final preparation for ministry. The schedule and number of years are dependent upon readiness for these steps. Formation centers on three goals:

1. Growth in a mature relationship with God through prayer and living God's word in a contemplative fraternity in the midst of God's people;
2. Continued incorporation into and growing identity with the Order;
3. Academic and pastoral preparation for ministry.

Those who complete the program at Whitefriars Hall are ready for assignment to Carmelite ministry as solemnly professed Carmelites and, in most cases, as priests.

In recent years, a growing international community of friars in both initial and on-going formation has been added at Whitefriars Hall. This development has provided a rich dimension of fraternal diversity to the communal and formational life of the house.

### **Preparation for Solemn Vows and Ministry**

Before and after Internship, students reside at Whitefriars Hall for completion of the initial stages of Carmelite formation and preparation for ministry. The process, which takes place during this period, continues many of the elements begun in the novitiate. Emphasis and focus change as the candidate moves through the various levels of formation. Discernment about petitioning for solemn vows and, in most cases, diaconal and presbyteral ordination is the focus. Note: In many cases, the newly professed will come to Whitefriars Hall immediately after novitiate to acquire a year of graduate level theology before beginning internship.

### **Spiritual Formation**

Prayer is central to the Carmelite charism. The Carmelite is called to a deeper awareness of living in the presence of God. So, that his prayer might become a more deeply integrated and growing reality, he must struggle with himself and open himself to the reality of God. The support system for this part of formation at Whitefriars Hall includes:

#### **1. Personal and Communal Prayer**

Each friar is responsible for gathering with the community for daily Eucharist and the Liturgy of the Hours. Furthermore, each one is expected to set aside at least a half hour **time** for personal prayer daily in their cells during silent hour, e.g., recollection, meditation, contemplation.



## 2. Spiritual Direction

Recognizing the need for the student to share his spiritual journey and to have a more experienced person with him in assessing his prayer, each professed student has a spiritual director. Ordinarily, this director is not a member of the local community. The Carmelite meets with this person on a regular basis. Respecting the unique quality of this relationship, the team asks for no evaluation reports.

## 3. Formation for Celibate Chastity

In continuation of a process which begins in the pre-novitiate and extends through all levels of formation, student friars are supported and encouraged in on-going growth in psychosexual integration and maturation. Through the Washington Area Formators Network and other programs organized in-house and in the Provinces and Order, those in initial formation are given a solid grounding in the psychology and spirituality required for a life-time commitment to celibate chastity.

## 4. Retreats

Each student makes an annual five-day retreat. He may use one of our Carmelite retreat centers or, for some special reason, another spiritual center. The retreat consists of some combination of quiet time, direction, and input. The place and time are decided upon by the student and his formation team member.

## 5. Retreat for Solemn Vows

Before solemn vows, the Carmelite student makes a retreat of at least thirty days. This will ordinarily be the Carmelite-themed retreat developed in recent years. If this is not available, then an alternative program will be used with the approval of the formation director. The individual and his formator will meet to evaluate this experience upon completion as part of the normal formation process.

## 6. Carmelite Formation

Each student is expected to avail himself of lectures, conferences and retreat days relating to Carmelite themes (e.g., Rule, Teresa, John of the Cross, Therese, etc.). Each student is expected to attend the two-part Carmelite Studies Program (August and January) unless excused for good reason by his formator, (see pg. 53). Other opportunities are made available at Whitefriars Hall, the Center for Carmelite Studies at CUA, the Carmelite Institute, and in various summer programs.

## **Community Formation**

Communal living is another aspect of the Carmelite charism. “Our Rule requires us to be essentially ‘Brothers’ and reminds us that the quality of interpersonal relationships within the Carmelite community needs to be constantly developed and enhanced...”<sup>47</sup> The support system for this part

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<sup>47</sup> Carmelite Constitutions, no. 19

of formation at Whitefriars Hall includes these elements:

### 1. One-to One Sessions

In the one-to-one sessions, in which the formation director meets with the students individually on a regular basis, the dialogue aids the student to appraise more objectively the happenings of his life. He can focus on various aspects of his Carmelite journey: his relational, academic, ministerial, communal, and spiritual life. The formation director acts as a supportive listener, a challenger, a helper. There is an atmosphere of trust and respect where discernment of the student's growth can happen. The student and formator also review grades and academic supervisory reports. Such sessions are good opportunities to share with the student input from peers, team and provincial administration. Most important, these sessions allow the student to assess his own readiness for solemn vows and ministry. It is within the context of these meetings that the student receives an on-going evaluation.

### 2. Group Sessions

Group sessions are conducted on a regular basis by an outside facilitator. The purpose of these sessions are to work on communication skills, to give and receive feedback on interpersonal style, and to assist in peer interaction.

### 3. Community Experience

Students are expected to be active participants in community responsibilities and events. Community responsibilities include house jobs, meal preparation and cleanup, hospitality to visitors, airport runs, etc. Community events include meals, celebrations for community members, community outreach activities, community days, etc.

## **Ministerial Formation**

The Carmelite is also called to service in the midst of the people. Our *Constitutions* require that Carmelites “must receive an appropriate human, theological, spiritual, professional, scientific and technical education, according to the legitimate desires and capabilities, and in keeping with the needs and plans of the Province and of the Order, so that they may fulfill their tasks with real competence, for the good of the people of God.”<sup>48</sup> The student will engage in pastoral commitments and develop the skills for such apostolic service.

### 1. The Program at The Catholic University of America

The expectation for all students is that they pursue advanced theological studies. Those preparing for the priesthood will ordinarily complete the M.Div. and/or STB program offered at the CUA.

The format for an approved Level 1 CUA supervised ministry entails meeting the requirements of a CPE (Clinical Pastoral Education) program or its equivalent. The format

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<sup>48</sup> Carmelite Constitutions, no. 168

for an approved Level 2 CUA supervised ministry entails ministry in a charism-related site, which is usually done in the context of the Internship and the Advanced Supervised Ministry Course of CUA. It is the responsibility of the student to provide copies of all ministerial evaluations of these ministries to the formation team at Whitefriars Hall.

*Those students who come from other countries and have not yet fulfilled the requirements of Praesidium will do so as soon as possible. Until those requirements are fulfilled, they can do ministry only under supervision. This supervision can be done in the one-to-one sessions with their respective formator, by an on-site supervisor and through the annual written evaluations of each student.*

## 2. Professional Development

In addition to the CUA's ministry requirements, the Carmelite student is encouraged to take advantage of other professional ministerial training in spiritual direction, pastoral counseling etc., during his summers.

## 3. Language Studies

The *Constitutions* state, "In order to promote the international character of the Order, and to foster an attitude of openness towards other cultures and other ways of thinking and feeling, candidates will be expected to learn a second language during the period of formation."<sup>49</sup> Students whose native language is English are expected to gain a reasonable proficiency for ministering in Spanish. They are required to have a basic exposure to the language and a sense of openness to the culture, if possible, by participating in a supervised immersion program. Students whose primary language is other than English are expected to gain proficiency in English. This can be facilitated by an immersion experience. Students should also give consideration to spending a period of time in ministry and/or language study in a culture other than their own.

4. A summary of the formation requirements mentioned above are listed in Appendix 9, p. 81.

## **Financial Accountability**

The Whitefriars Hall program operates on its own budget to which both Provinces contribute through a mutual agreement of both Provincial Councils based on the recommendations of their respective Provincial treasurers. The following is the financial policy for the professed:

### 1. Allowance

As a general practice, each person will be given an allowance each month. This allowance is expected to cover all ordinary expenses with the exception of room, board and tuition.

### 2. Extraordinary Expenses

Dental and medical expenses will be handled according to the respective Provincial policies.

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<sup>49</sup> *Ibid.*

The same will apply to eye examinations, glasses and repairs. Within limits, black clerical garb for ministry will also be a provincial expense (one black suit, slacks, shirts). Other extraordinary expenses will be treated on an individual basis.

### 3. Income

All money received from stipends, gifts and salaries is to be turned into the house treasurer, provincial procurator or his delegate.

### 4. Checking Accounts

Each individual will have a checking account. There should be an alternate signer to prevent difficulties in case of death or serious accident. If possible, a bank should be used that makes no charge for writing checks and requires no minimum balance.

### 5. Miscellaneous Items

The house gasoline credit cards are used for auto expenses only. School related expenses, including textbooks, are covered by the Province. Because the situation of each student is different, decisions about profession and ordination expenses will be made on an individual basis. All donations received at ordinations or professions are turned into the provincial procurator or his delegate. In the planning of the house budget, a set amount is allocated for each person's cellular phone usage. In this and other financial matters, the student is urged to act with fiscal responsibility.

### 6. Vacation

Each student is allowed a vacation each summer according to the Provincial statutes or customs. Students are also allowed some time away during the Christmas break.

### 7. Cell phones

A student can enroll in the Carmelite Group Cell-Phone Plan, and the charges for this plan are covered during the student's period of initial formation. This includes one phone.

Note: The Provinces do not pay for other plans the student may already have, only the Carmelite Group Plan. To avoid penalties, a personal plan will be paid for by the Provinces until the first dropout date.

Note: Replacement of damaged or lost phones is the responsibility of the student.

Note: If the student moves into internship, the internship site pays for the charges.

Note: When the student completes initial formation, his new assignment then pays for the charges.

## **Evaluation Process**

Students are accustomed to receiving feedback from the formation team, peers and community on a regular basis. Annually, each simply professed student is evaluated by the director in writing if he has not already been evaluated under the four occasions when a more formal process of

evaluation is conducted:

1. when the simply professed student petitions to extend simple vows;
2. when the simply professed student petitions to make solemn vows;
3. when a student is petitioning for ordination to the diaconate;
4. when a transitional deacon is seeking priestly ordination.

Evaluation is essentially a discernment process to enable the local community and the individual to determine mutually the individual's call to Carmelite community and ministry or to another vocation in the Church. The evaluation covers the above areas of spiritual formation, community formation, ministerial formation, and appropriate stewardship of his health by reasonable management of any health issues, (e.g., his weight, abstinence from nicotine, responsible use of alcohol, etc.). The focus of this process is to help the individual grow in clarifying where he can most effectively and freely use his talents in the service of others. The evaluation process is an extremely sensitive and serious responsibility for the community and the individual. Both must be mature, open, and trusting of the other in order that the good of both is supported and advanced. The integrity of this process requires that each Carmelite take responsibility for getting to know those members who are to be evaluated. This is a serious responsibility both in regard to the individual being evaluated and in regard to the Province and Order.

### **Evaluation for Extension of Simple Vows**

The formation team in dialogue with the Provincial, Provincial Council, and the student may recommend extending the student's vows. The reason for the recommendation will be given to the student in writing. The student friar in simple vows who wishes to extend those vows must petition the Provincial in writing explaining his reasons for seeking an extension. The director at Whitefriars Hall and/or the intern director, as applicable, will provide the Provincial with a written evaluation and recommendation in regard to the merits of the petition. In preparing that evaluation, the formation director and/or the intern director, as applicable, will consult the House Chapter's views and recommendations in regard to the petition.

### **Evaluation for Solemn Vows**

A student must spend two years at Whitefriars Hall before being voted upon for solemn vows.

The evaluation process may be done during the second year at the Hall (or later).

The evaluation for solemn vows is a five-step process:

1. The student desiring to petition for solemn vows makes that intention known to the Provincial and formation director. The candidate then meets individually with each of the members of the House Chapter to get direct feedback regarding his observations of the candidate's readiness for vows. Based on the above feedback, the religious then discusses with his one-to-one person the appropriateness of petitioning, waiting or perhaps leaving formation.
2. The candidate will prepare a written self-evaluation according to the format provided in Form N (p. 112). Usually, three written peer evaluations are also part of the evaluation process. The formation team determines which peers will provide these evaluations. Each peer evaluation is shared by the evaluator with the candidate. The evaluators are to follow the format provided in Form O (p. 113). There is no form for members on probation. If a student

is a returning candidate in his probationary year, then the pre-novitiate evaluation form (Form J, p. 104) is used.

3. The individual candidate must submit his formal, handwritten petition to his Provincial.

4. At the vocation **by the members of the house chapter**, the formation director presents the student. The respective Provincial is present along with the members of the House Chapter. Members are asked to approach this meeting in a spirit of prayer, with a sense of the important responsibility they have to the individual and the Carmelite community, and with the guarantee of confidentiality.

5. The vote and the opinion of the House Chapter are transmitted to the Provincial Council. The final decision in regard to solemn vows is reserved to the Provincial with the deliberative vote of his Council. If the petition for solemn vows is not granted, the Provincial and formation director will communicate that decision to the candidate as clearly and frankly as possible, safeguarding the confidentiality of the House Chapter and the Council's deliberations.

### **Evaluation for the Diaconate**

The student friar in solemn vows who wishes to seek ordination to the diaconate must submit a hand-written petition to his Provincial explaining his reasons for seeking ordination. The formation team at Whitefriars Hall will provide the Provincial with a written evaluation and recommendation in regard to the merits of the petition. In addition, the candidate will provide a written self-evaluation and the formation team will solicit written peer evaluations from three friars they designate following the format specified in Form P (p. 114). The House Chapter will be convened to consider the petition and the vote and opinion of the House Chapter will be provided to the Provincial. The final decision to call the applicant to Orders is reserved to the Provincial. After approval, the student will make a declaration of freedom and a profession of faith, according to the approved documents, to the formation team and witnesses prior to his diaconate ordination.

### **Evaluation for the Priesthood**

A transitional deacon seeking priestly ordination will be required to petition his Provincial in writing. He will prepare a one-to-two-page summary statement outlining his reasons for seeking ordination to the priesthood and the gifts he feels he brings to this ministry. The formator principally responsible for the candidate will present a comprehensive evaluation of the candidate to the House Chapter, drawing on the full scope of his previous evaluations in formation and other available data. Following a thorough discussion, the House Chapter will then vote on the candidate's petition and the result of that vote and the views of the Chapter will be forwarded to the Provincial. The final decision to call the deacon to priestly ordination is reserved to the Provincial.

### **Program Evaluation**

Before the end of each year, the formator(s) will develop and administer a written evaluation of the formation and community experience to be completed by the students and members of the community.

## **Praesidium**

At every level of formation the student will adhere to the standards of the Praesidium, Inc., accreditation program (see Appendix 8 – “Praesidium, Inc.,” p. 78) and participate in the program’s training and updating in a timely manner.

## **Departure from Community**

If a student is asked to leave the formation program, or if he decides to withdraw from the program, the formation director will write a one-page summary outlining the reasons for his departure from the program as well as a recommendation whether he should be re-admitted to the program at a future date. If the student applies to any other seminary or house of formation, there will be a sharing of information as deemed appropriate by the Provincial with the diocese, religious community, or seminary. A copy is to remain in the provincial archives or other suitable place, along with any other material according to provincial guidelines, until such time that it is highly unlikely the student will be reapplying to another diocese, religious community, or seminary.



## **CASA SAN ALBERTO DE JERUSALÉN**

### **Post-Novitiate Formation in El Salvador**

#### **Introduction**

Casa San Alberto de Jerusalem in San Salvador is a Carmelite formation house for the simple professed brothers from El Salvador and Central America of the Province of the Most Pure Heart of Mary.

In this stage of formation, the brothers:

- conclude their philosophical-theological studies
- prepare for solemn profession
- prepare to assume the Carmelite ministerial life in El Salvador, in the province and the church in general, either as a friar with solemn vows or from the priesthood, as the majority do.

The time of each student in this house depends on the preparation for these steps, according to the process of each friar in simple vows. The training focuses on three objectives:

1. Grow in a mature relationship with God through prayer and living the word of God in a contemplative fraternity in the midst of the people of God;
2. Continuous and growing incorporation of religious and Carmelite identity;
3. Academic and pastoral preparation for the ministry.

Upon completion of the formation process, students are ready to be assigned to a Carmelite community, either as a brother or as a priest, and from there continue their ongoing formation. The house of San Alberto de Jerusalem in San Salvador is open to students of simple vows from other jurisdictions of the PCM province, as well as other realities of the Order in such a way that we are enriched by the cultural diversity present in the Order.

#### **Preparation for solemn vows and ministry**

- The brothers will continue their academic studies at the José Simeón Cañas Central American University (UCA).
- The preparation for community life will include, in addition to the joint organization of the house, weekly group meetings to review fraternal correction.
- For training in the pastoral ministry, they will be invited to assume assigned tasks such as the accompaniment of the Third Order and the JUCAR, to collaborate with the ministries that the solemnly professed brothers have been exercising: Communications, Vocations, Our Lady of Mount Carmel Association, parish, farm etc. In addition, we will continue to support the local church.
- In the deepening of his Carmelite identity, we will give special attention to this aspect in the monthly conferences, where a solemnly professed brother will share his personal experience from a theme proposed by RIVC, no. 150 -157

Throughout the process that takes place during this period, many of the elements started in the pre-novitiate and novitiate will continue to be deepened.



The emphasis and discernment in accompaniment shift in focus as the candidate progresses through the various levels of training and, according to the request for solemn vows, as in most cases, the request for diaconate and priestly ordination.

All this from a dialogical relationship, in the daily sharing and in the One-to-One meetings, between the simple professed brother, the formator, the local Carmelite community and the provincial, following what was proposed by the RIVC, no. 110 -112 and 122.

### **Spiritual formation**

Prayer has a central value in the identity of every Carmelite, who is called to a deeper awareness of living in the presence of God. In order for his prayer to become a deep, integrated and real practice in himself, in many cases he must be aware of the struggle within himself and open himself to the reality of God.

To help in this fundamental aspect of formation, in the daily life of the community at Casa San Alberto it is proposed that:

1. Each friar dedicate at least half an hour a day to personal prayer: prayerful reading of the word, meditation, contemplative prayer, etc. He is also responsible for gathering with the community for the daily Eucharist, the Liturgy of the Hours, and the practice of the Sacraments.
2. Each friar seeks a Spiritual Director with the appropriate suitability to strengthen his life of prayer, heal his possible personal wounds in the light of faith, stimulate his spiritual development, learn to resolve his conflicts, etc. The Carmelite friar will meet regularly with this person and, regarding the unique quality of this relationship, the team does not request evaluation reports. It is only suggested that preferably the spiritual director be a religious.

### **Training for celibate chastity**

Continuing a process that begins in the pre-novitiate and extends to all levels of formation, the student friars are supported and encouraged in the continuous growth of psychosexual integration and maturation. Through the support of qualified professionals in the field, the training offered by the Conference of Religious of El Salvador and other programs organized internally in the Province and the Order. Those in initial formation receive the solid foundation in psychology and spirituality required for a joyful, healthy, and fruitful commitment to chastity in lifelong celibacy.

### **Retreats:**

- Annual retreat. Every year, the Carmelite community holds a five-day retreat at the end of the year. The retreat consists of a combination of quiet time, direction and focus on Carmelite themes and vocational discernment. The place and dates are decided by the formation team.
- Retreat for solemn vows: Before solemn vows, the Carmelite student makes a retreat of at least thirty days. Normally it will have Carmelite-themed content. If this is not available, an alternative program will be used with the approval of the formation director. The brother and the formator will meet to evaluate this experience at the end as part of the retreat.

### **Extended Carmelite Formation**

Each student is expected to take advantage of conferences, seminars, and retreat days related to Carmelite themes (Rule of Saint Albert, Teresa of Ávila, Saint John of the Cross, Teresa of the

Child Jesus, etc.). Due to the reality of the community in San Salvador, every February and July we have guests specialized in Carmelite themes for the community in the country. Due to the economic and legal cost to travel to the US, we will have budgeted that only 2 professed brothers per year can participate in the Carmelite Studies Program in August at Whitefriars Hall in Washington DC or if it were the case in another country in Latin America.

### **Psychological attention**

The person who considers it necessary and requests it will have access to psychological care. It can also happen that in the process the formator can suggest it to the brother.

### **Community life in the formation of the Carmelite charism**

As Carmelite religious, we must form our members with a strong sense of the value of living in fraternal communities, with a real sense of horizontality as established by our Primitive Rule, in fidelity to the model of the Jerusalem community. To achieve this, it is expected to have:

#### **One on one interviews**

In the individual sessions, in which the formator meets periodically (minimally monthly) with the brothers. The dialogue helps the student to evaluate in a more objective way the events of his life. They can focus on various aspects of his Carmelite journey: his relational, academic, ministerial, and spiritual life. The formator acts as a supportive listener, a challenger, an accompanier. It must be done in an environment of trust and respect where the discernment of the facts helps the growth of the student. The student and the formator also review academic notes and grades.

#### **Supervision reports.**

These sessions are good opportunities to share with the students the contributions of his peers, the formation team and the provincial administration. Most importantly, these sessions allow the brother to assess his own readiness for solemn vows and ministry. Within the framework of these encounters the student receives a continuous evaluation.

#### **Group sessions**

Group sessions are regularly conducted by an external facilitator. The objective of these sessions is to work on communication skills, give and receive feedback and comments from the other brothers, and help in peer interaction.

#### **Community experience**

Students are expected to be active participants in community responsibilities and events. The responsibilities of the community include preparation for liturgical celebrations, maintenance and cleaning of the house, preparation of meals, hospitality to visitors, labor, awareness and training in sustaining the economy of the community, etc.

## **Sport activity**

Sports practice is encouraged at least once a week in order to promote physical and mental health as well as community integration.

## **Ministerial Formation**

The Carmelite is also called to form open communities at the service of the people. Our 2019 *Constitutions* require that Carmelites "receive an appropriate human, theological, spiritual, professional, scientific and technical education, according to their legitimate desires and capabilities, and in keeping with the needs and plans of the Province and of the Order, so that they fulfil their tasks with real competence, for the good of the people of God." (*Constitutions*, no. 168) The student is committed to the pastoral processes and will develop the skills for such an apostolate.

### **1.Service.**

1. The program of the José Simeón Cañas Central American University (UCA), offers our students a six-year academic program, which begins in our case with the two years of pre-novitiate at the Xiberta Center and continues for four years when arriving from the novitiate to this house. Said formation program is endorsed for priestly formation by the authority of the Church.

Upon completion of this program, the Carmelite student receives three degrees:

- a civil degree recognized by the Salvadoran State and,
- by agreement between the Salvadoran Jesuits and the Pontifical University of Comillas - Spain, they receive another civil degree recognized by the Spanish State,
- the degree of ecclesiastical baccalaureate, recognized by the Church.

To complete the training for the pastoral ministry, the UCA requires its students to spend six hundred hours in internships as professors of theology in the popular schools of theology established in various areas of the country. Then, for the purposes of graduation, the student must carry out another pastoral project for three hundred more hours, either in a parish or another service in a recognized ecclesial institution.

Our brothers, pastorally, actively participate giving formation support in one or several parishes of the archdiocese or other nearby dioceses, every weekend. They participate in the development of the Carmelite Third Order, vocational promotion and young Carmelites (JUCAR), etc., as practices that train them for later ministry.

### **2.-Development of skills**

In addition to the requirements of the academic process of the UCA, the Carmelite student is encouraged to draw on other ministerial capacities in spiritual direction, administration, project management, counseling, liturgy, art, etc.

### **3.- Language studies**

The *Constitutions* state: "To promote the international character of the Order and foster an

attitude of openness towards other cultures and other ways of thinking and feeling, candidates are expected to learn a second language during the period of formation. Everyone should know at least one of the official languages of the Order.” (*Constitutions*, no. 168)

In compliance with that rule, post-novitiate students undergo an intense period of English immersion residing in a community in the United States, which must continue during their preparation for solemn vows, to the extent possible in the USA or other Carmelite residence in an English-speaking country.

#### **4. The Conference of Religious of El Salvador (CONFRES)**

Carmelite students, to grow in inter-congregational awareness, participate monthly in activities scheduled by the Conference of Religious of El Salvador (CONFRES) in what is known as "New Generations," a special space for religious in simple vows.

#### **Financial Responsibility**

The formation program of the Casa San Alberto de Jerusalén works with its own budget, financed by the province of Purísimo Corazón de María, and as far as possible, with donations from local benefactors.

The following is the financial policy for the professed:

- Monthly stipend: As a general practice, each student will receive a subsidy each month. This subsidy is expected to cover all ordinary expenses with the exception of room, board and tuition, provided by the house.
- Extraordinary expenses: Dental and medical expenses will be managed in accordance with the provincial regulations. The same will apply to eye exams, eyeglasses and repairs, clothing, footwear, etc., within limits. Other extraordinary expenses will be treated individually.
- Income: All monies received from stipends, gifts, and salaries must be turned over to the treasurer of the house, the provincial treasurer or his delegate.
- Various items: School-related expenses, including textbooks, are covered by the house budget. Because each student's situation is different, decisions about the profession and management costs will be made individually. All donations received at ordinations or professions are given to the provincial treasurer or his delegate. In this and other financial matters, the student is urged to act with austerity and simplicity in expenses and way of life.
- Vacation: Each student will be given vacation time at the end of the school year, for Christmas and New Year's for a period between three and/or four weeks, for which period a special stipend will be awarded for expenses. Students also have free time for short periods in July and other public holidays in the country.
- Cell phone: It will be the responsibility of each student to pay the expenses of his mobile phone, which is considered included in the monthly subsidy.

Note: If the student undertakes an internship, the phone costs are paid by the community where the internship is carried out.

Note: When the student completes initial training, their new assignment pays the fees.

## **Evaluation process**

Students must develop their own culture of human and Christian development, based on continuous evaluation by their formators, their peers and the community, within the framework of the timeline agreed upon by the local community. Each year, each professed member is evaluated by the director of formation in writing, so that they live a process of transformation and growth in the Spirit according to Carmelite mysticism and the contribution of the human sciences. There are four special assessments that most students are subject to:

1. For his renewal of simple vows at the end of the period for which he professed, for as long and as many times as necessary according to law.
2. When the student of simple vows asks to make solemn vows, which will be when the brother has lived at least 2 years in the San Alberto house.
3. Applying for ordination to the diaconate; that he will have to practice for at least 6 months and after having lived as solemnly professed for at least 6 months supporting or projecting possible non-clerical ministries in El Salvador.
4. When a deacon in transition seeks priestly ordination.

The assessment is essentially a discernment process that allows the local community and the individual to mutually determine the individual's call to the Carmelite community and to ministry or another vocation in the Church. The assessment covers the above areas of spiritual formation, community formation, ministry formation, and self-care (e.g., his weight, nicotine withdrawal, responsible alcohol use, etc.). The goal of this process is to help individuals clarify where they can most effectively and freely use their talents in the service of others. The evaluation process is an extremely sensitive and serious responsibility for the community and the individual. Both must be mature, open, and trusting in each other so that the good of both is compatible and taken into account.

The integrity of this process demands that each Carmelite assume responsibility for knowing the members who will be evaluated. This is a serious responsibility, both towards the person evaluated and towards the Province and the Order.

## **Evaluation for the extension of simple votes**

The formation team in dialogue with the Provincial, the Provincial Council and the friar in simple vows, can recommend extending the student's vows. The reason for the recommendation will be given to the student in writing.

The student friar of simple vows who wishes to extend those vows must apply to the Provincial in writing explaining his reasons for requesting an extension.

The director of Casa San Alberto and/or the Director of Formation, as appropriate, provide the Provincial with a written evaluation and recommendation on the merits of the petition. In preparing that evaluation, the formator and/or the Director of Formation, where appropriate, will consult the opinions and recommendations of the local community (Carmelites in solemn vows) regarding the request.

## **Evaluation for solemn vows**

A student in simple vows must live at least two years in the house of formation to request solemn vows. The evaluation for solemn vows is carried out in five steps:

1. The student who wishes to request solemn vows makes his intention known to the Provincial and to the Director of Formation, who will recommend whether or not to carry out an application process. The candidate then meets individually with each of the House Chapter members to get direct feedback and their observations on the candidate's readiness for solemn vows. Based on the previous comments, the religious discusses with each person the advisability of requesting, waiting another time or perhaps leaving formation.
2. The candidate will prepare a written self-assessment according to the format provided in Form N. Generally, three peer-written evaluations are also part of the evaluation process. The formation team determines which peers will provide these assessments. The evaluator shares each evaluation with the candidate. Evaluators should follow the format provided on Form O.
3. The candidate must present his formal application in his own handwriting to the Provincial.
4. At the vote of the house chapter (members in solemn vows) the Director of Formation presents the evaluation of the student. The chapter is asked to approach this meeting prayerfully, with a sense of the important responsibility they have to the individual and the Carmelite community, and with the assurance of confidentiality.
5. The vote and opinion of the House Chapter are transmitted to the Provincial Council. The final decision on solemn vows is reserved to the Provincial with the deliberative vote of his Council. If the request for solemn vows is not granted, the Provincial will communicate this decision to the candidate in the clearest and most honest way possible, safeguarding the confidentiality of the Chapter, of the candidate's community, and of the deliberations of the Council.

## **Evaluation for the diaconate**

A friar in solemn vows who wishes to request diaconal ordination must submit a handwritten request to the Provincial explaining the reasons for which he is requesting ordination. The Casa San Alberto formation team will provide the Provincial with a written evaluation and recommendation on the merits of the request. In addition, the candidate will provide a written self-assessment and the formation team will request written assessments from three friars they designate following the format specified on Form P.

The House Chapter will be convened to consider the petition, and the vote and opinion of the House Chapter will be provided to the Provincial. The final decision to call the aspirant to Orders is reserved to the Provincial. After approval, the student will make a declaration of freedom and a profession of faith, in accordance with the approved documents, to the Formation Team and witnesses prior to their diaconal ordination.

## **Evaluation for the Priesthood**

A transitional deacon seeking priestly ordination must apply in writing to his Provincial. He will prepare a one- or two-page summary statement outlining his reasons for seeking ordination to the priesthood and the gifts he feels he brings to this ministry. The formator responsible for the

candidate will present to the House Chapter a comprehensive evaluation of the candidate, drawing on the full extent of his previous evaluations in formation and other available data. After a thorough discussion, the Chapter will vote on the candidate's application and the result of that vote and the opinions of the Chapter will be forwarded to the Provincial. The final decision to call the deacon to priestly ordination is reserved to the Provincial.

### **Evaluation Program**

At the end of each year, the formators will develop and administer a written evaluation of the formation and community experience in which the students and community members must participate.

### **Praesidium**

At each level of training, the student will adhere to the standards of the Praesidium, Inc. accreditation program (see Appendix 8, "Praesidium, Inc.") and will participate in training and updating of the program in a timely manner.

### **Leaving the Community**

If a student is asked to leave the formation program or decides to withdraw from the program, the Formation Director will write a one-page summary outlining the reasons for leaving the program as well as a recommendation as to whether they should be re-admitted to the program at a future date. If the student applies to any other seminary or house of formation, the information that the Provincial deems appropriate will be shared with the diocese, religious community, or seminary. One copy should remain in the provincial archives or other suitable location, along with any other materials in accordance with provincial guidelines, until it is highly unlikely that the student will reapply to another diocese, religious community, or seminary.

## THE CARMELITE STUDIES PROGRAM

### Introduction

The Carmelite Studies Program, which is based on the Program of Studies in the *Ratio Institutionis Vitae Carmelitanae (RIVC)*, is a thematic and cyclical design for future gatherings of our men in formation. Its purpose is to support their ongoing formation in the Carmelite charism, spirituality, history, and tradition during the years of initial formation.

This program of studies was designed with two purposes: first, it is an opportunity for the formandi in the various formation houses and in Internship to become better acquainted with each other, and secondly, it introduces and develops a deeper understanding of the Carmelite charism as outlined in the *RIVC* with the overall objective to deepen our Carmelite identity. The *RIVC* states that, “these subjects and areas must be covered to ensure a complete formation in the Carmelite life.”<sup>50</sup> Below you will find a list of the topics and the program.

Each topic or theme is developed in two parts. The first part is a several day program in the second week of August with presentations/workshops on the theme in the context of fraternity and prayer to deepen the experience of our Carmelite identity. The program is intended to be educational and formative. The second part will take place during the annual three-day formation gathering in January. Each formation community will further develop the theme with a presentation on how they continued to reflect on the program since August.

### PROGRAM OF CARMELITE STUDIES – AN EIGHT YEAR CYCLE

- **(1) Spiritual Discernment in our Tradition and Formation - 2023**
  - o Conversion and transformation
  - o God’s Gift and our response
  - o The Interior Life
  - o Silence and Solitude
  
- **(2) Significant Carmelite figures – 2024**
  - o Nicholas of France
  - o John of St. Sampson
  - o Sibert of Beka
  - o Michael of St. Augustine
  - o Bartholomew Xiberta
  
- **(3) Prayer in Carmel - 2025**
  - o Liturgical life in Carmel
  - o Contemplative prayer
  
- **(4) Leadership in Community - 2026**
  - o Our life as brothers
  - o Work in our tradition

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<sup>50</sup> *RIVC*, no. 136



- Apostolic Ministry
- **(5) The Rule - 2027**
  - Lectio Divina
  - Silence and solitude
  - Scriptural Tradition: “Living in Allegiance to Jesus Christ”
  - Biblical Imagination
- **(6) Saints of Carmel (How to Read the Mystics) - 2028**
  - Teresa of Jesus
  - John of the Cross
  - Therese
  - Mary Magdalen de’ Pazzi
  - Elizabeth for the Trinity
  - Edith Stein
  - Titus Brandsma
- **(7) The Internationality of the Order -2029**
  - Inculturation of the Carmelite Charism
  - The Carmelite Family
- **(8) Carmelite Prophetic & Contemplative Tradition - 2022**
  - Elijah and Mary
  - JPIC and Carmelite response



# APPENDICES



## APPENDIX 1

### Internet Policy for Formation Communities

For Carmelites, skill in the appropriate use of social media, websites, video-chats, social networking sites (computer-based, tablet-based, and phone-based) is essential. All those in initial formation as well as all friars should maintain a transparent on-line presence that reflect the values of the Church, the Order, and their own best selves. Ongoing education about the healthy and proper use of the internet/social media will be part of the formation program, especially as the presence of this technology continues to expand in our lives and our culture.

It will be considered a serious offense for any friar to misuse any digital device. Everyone is prohibited from using these devices to access sites that are pornographic, illicit, or illegal. Using these devices to access child pornography is criminal behavior, will be reported to local law enforcement authorities, and will lead to dismissal from the formation program.

Excessive amounts of time on social media can impede the formation of Carmelite fraternal life and provide a poor substitute for genuine human interactions. The internet should not be an escape from, or an avoidance of, the challenges of interpersonal living. As much as possible friars should avoid replacing face-to-face interaction with digital ones, especially when discussing important or sensitive matters. Friars should refrain from using electronic devices during community recreation and meals.

The internet/social media should be seen as an extension of one's Carmelite identity and not an alternative persona. Thus, people should only post content that is consistent with this identity. Content that is vulgar, inflammatory, or divisive is clearly inappropriate. Additionally, no friar will have a secret on-line life, e.g., a private profile on social media sites or on-line dating services.

To ensure that friars in initial formation are utilizing social media/internet in a healthy manner, and in a way that is harmonious with our Catholic Carmelite values, the formation team will periodically evaluate friars in this regard.

## APPENDIX 2

### Student Files

The following policy and procedures are recommended for the files of students in formation during the application and initial formation stages:

**Policy:** All original documentation is kept in the Provincial Offices. Copies of these files will be in the possession of the formators at each level of formation (pre-novitiate, novitiate, internship & theological studies). The files of the copies will be passed to the next formator as the student moves to the next level of formation. The original **copy** of any documentation done at each level will be sent to the Provincial Offices at the end of each academic year. This documentation would include: evaluations, petition for entry to the novitiate, petition for simple vows, petition for renewal of simple vows, installations into ministries, petition for solemn vows, petition for orders, declarations of freedom and faith, and reasons for departure or dismissal.

Form A (pg. 83) provides a convenient way of keeping track of these documents.

#### **Procedures:**

House files for all St. Elias Province formandi will be returned to the Provincial Office at the completion of each stage of formation. The Provincial Office will forward the appropriate file to the next level of formation and Director.

#### **Vocation Office:**

All original documentation, such as application, photo, psychological evaluation, medical evaluation, criminal background check, transcripts, sacramental records, autobiographies, and letters of reference will be sent to the Provincial Offices once the candidate has been accepted. Copies of the application, psychological evaluation, autobiography, academic transcripts, and medical evaluations will be sent to the Pre-Novitiate Formation Director.

#### **Pre-Novitiate:**

Send originals of formator's evaluation, House Chapter vote, and petition for entry to the novitiate to the Provincial Office.  
Copies of the above to his formation house file.  
Send traveling file to Novitiate.

#### **Novitiate:**

Send originals of formator's evaluation & recommendation at 9<sup>th</sup> or 11<sup>th</sup> month and his petition for simple vows to Provincial Offices.  
Copies of the above to his formation house file.  
The Vow Formula is kept in the Profession Book at the Novitiate and a copy is sent to the Provincial Offices.  
Send traveling file to Intern Director or formators at Whitefriars Hall.

#### **Internship:**

Send originals of the Intern Supervisor's evaluation & recommendation at the end of each year of internship to the Intern Director who then forwards them to the Provincial Offices.  
Send traveling file to Whitefriars Hall.

#### **Whitefriars Hall:**

Send originals of formators' evaluations & recommendations for renewal of vows, solemn vows, and orders; House Chapter vote for renewal of vows, installations into ministries, solemn vows, and orders; petitions for renewal of vows and for solemn vows, declarations of faith and freedom petitions for Orders to the Provincial Offices.

#### **Termination of the Traveling File:**

When a person leaves or completes the formation program, his traveling file is sent to the Provincial Office for cross-checking and then destruction.

## APPENDIX 3

### A Candidate with Previous Formation Experience

The following procedures are to be followed for candidates applying for acceptance who have previously been in a seminary, religious formation program or diocesan program:

1. The Vocation Director, upon gaining knowledge of a candidate's previous experience in formation, will inform the candidate that he must permit the total release of all information concerning his discontinuance from any previous seminary, diocese or religious community. The "Release of Information" form in Form E (p. 95) will be used for this purpose.
2. The Vocation Director will then contact the rector/formation director of all previous seminaries, dioceses or religious communities requesting a written statement as to the reasons for discontinuance or dismissal and any other pertinent information pertaining to the candidate's time with the seminary or community. Major Superiors, bishops, vocation directors and or deans in office at the time the candidate was in formation should also be contacted if necessary. He will also inform the formation director/rector that the Provincial, or his delegate, will contact him to set up an oral confidential interview regarding the application of the candidate.
3. The Provincial, or his delegate, should have an oral interview with the rector/formation director of all previous formation programs.
4. The Vocation Director will see to it that the candidate completes the rest of the application process.
5. The Admissions procedures of each Province will be followed.
6. If the candidate is accepted, the provincial, in his formal letter of acceptance, will note that the candidate was evaluated according to guidelines set forth in the Formation Manual and that, in his prudential judgment, the candidate is fit for the formation program. A copy of this letter will be sent to the former bishop or major superior of the candidate.
7. In the case where the provincial has reservations about the judgment for a particular candidate, he may ask the Conference of Major Superiors of Men's Institutes to offer advice on the matter.

### Returning Person with Previous Carmelite Formation Experience

8. In the case of a man who has previously been in our own formation program and wishes to return to formation, the Provincial will consult with the men of the Province who had been his formators along with his original vocation director. They shall refer to and give due consideration to the closing statement written by the formator when this man left formation. The decision whether the man should repeat the novitiate is made by the Prior General. The process will include a personal interview by the provincial or his delegate covering the following areas since he left the Carmelite Formation program:
  - a. Employment history
  - b. Relational history
  - c. Spiritual direction history
  - d. History of his decision to leave and his decision to return to the Carmelites
  - e. Update his autobiography from the time he first entered the Order.
  - f. Update his academic transcripts, if applicable
9. He will also provide the results of a recent medical examination, using the form in this manual.
10. At the discretion of the Provincial, he may be asked to undergo a new psychological examination.

## APPENDIX 4

### Transfer of a Priest/Brother

#### Initial Procedures

The following procedures are to be followed for transferring a religious and/or priest from another community/diocese to either North American Province of Carmelites:

1. Refer the case to the Provincial Vocation Director.
2. The Provincial Vocation Director arranges an interview with the applicant.

#### For a Religious from another Institute

3. If transferring from another religious institute and perpetually professed the one desiring transfer submits a written request to both supreme moderators (Generals) indicating the desire and reason for transfer. The approval of each supreme moderator and council is needed for the validity of the transfer
4. If transferring from a society of apostolic life the proposed transfer is to be submitted to The Congregation for Institutes of Consecrated Life and Societies of Apostolic Life. The directions of this Congregation concerning the transfer are to be followed.

For a Diocesan or Secular Cleric:

5. If the one transferring is a secular cleric, the Provincial is to consult with the candidate's bishop.

#### Admissions Process continues

6. Request letters of recommendation from persons named on the application form, as well as the former Provincial or Bishop, and the spiritual director of the applicant.
7. The portfolio should contain a recent photograph as well as psychological testing results.
8. An Admissions Board, consistent with provincial admission policy, should discuss the applicant's portfolio. The Board recommends acceptance/rejection to the Provincial.
9. The Provincial accepts/rejects the applicant and sends notification of the decision to the applicant, the Supreme Moderators, The Congregation for Institutes of Consecrated Life and Societies of Apostolic Life, and the Provincial/Bishop. The appropriate people are notified depending upon who was involved in the transfer.
10. If the applicant is a secular cleric, the Provincial determines his placement during the time prior to the novitiate, after he has heard the suggestions of the provincial council.

11. If the applicant is a perpetually professed religious the time (a minimum of three years), location, and content of the period of probation is determined by the Provincial and the provincial formation directors after they have heard the suggestions of the provincial council.
12. Ordinarily the applicant will follow the regular formation sequence in recognized houses of formation within the Province(s).

### **Probation Period**

All transfer candidates from other religious institutes or dioceses will complete a probationary period as outlined in Canon Law. All procedures listed above are to be followed before the applicant will begin the formation probation period. The location of the probation period will be determined by the Provincial in consultation with the Council and formation directors. The period will ordinarily last nine months to a year.

During this year he may do further theological studies or studies in another field that would also help to further his ministry possibilities. He will follow the formation program set up at his respective residence.

The Provincial and his Council will designate a Carmelite who will serve as the applicant's formation director; the two will meet at least semi-monthly during the probation period.

The formation director will coordinate a meeting with the local community during the probation period to evaluate the applicant's readiness for the novitiate if he is transferring from a diocese. If an applicant is transferring from another religious institute and is perpetually professed, the procedures in Appendix 3 (p. 68) are followed and the period of probation begins at the time of acceptance.

A transferring diocesan cleric is bound to the same period of novitiate and simple profession as any other candidate. A perpetually professed member of a religious institute is bound only to a probationary period of at least three years. During the probation period the obligations of the original vows stay in effect, but the applicant has no voice in either community. At the end of this probationary period he would profess solemn vows in the Carmelite Order and the obligations of the original vows would cease.

### **Novitiate**

Ordinarily, the canonical year will be at the novitiate in Middletown. If for some reason the Provincial and his Council, after consultation with the formation director and the novice director do not deem this location best for a particular individual, the Provincial and his Council will ask the Prior General to designate the novice director as well as the location and dates for the novitiate. In this case, a program for the novice's introduction to the Carmelite and religious life will be outlined before the individual begins the novitiate year. The ordinary procedure for evaluation will be followed as outlined in the novitiate section of this *Formation Manual*.

## **Simple Vows (Transfer of a Priest from a Diocese)**

During the three years of simple vows the candidate will meet monthly with the formation director assigned by the Provincial and his Council. These sessions will be dialogues to help the candidate appraise more objectively the happenings of his life. He can focus on various aspects of his Carmelite journey, his relational, ministerial, and spiritual life. The formation director acts as a supportive listener, challenger, and helper. There is an atmosphere of trust and respect where discernment of the candidate's growth can happen. Such sessions are good opportunities to share with the candidate input from his peers, the provincial administration, and the formation director himself. Most importantly, these sessions allow the candidate to assess his own readiness for solemn vows.

## **Solemn Vows**

At the end of the third year the candidate and his formation director will mutually determine his readiness for solemn vows. The local community will meet with the formation director to make their recommendation to the Provincial and his Council, which will then have a deliberative votation. If accepted, the Provincial will formally notify the candidate's previous Ordinary/Major Superior. Upon profession of solemn vows, a priest candidate is automatically excardinated from his diocese or former religious community and incardinated in the Province of his profession.

Applicants in solemn vows in another institute will follow the procedures outlined in Canons 684, 685.



## APPENDIX 5

### Readiness for the Novitiate

In order to participate in the novitiate program and for its purpose to be achieved, the candidate needs to have reached a certain level of personal growth and development. This development as provided for in the pre-novitiate program may be described in terms of the spiritual, intellectual, and psychological dimensions of life.

Spiritually, the candidate needs to have developed a capacity for and willingness to grow in relationship with the Lord. Carmelites are called to “meditate day and night on the Law of the Lord,” and so the candidate must show signs of being able to embrace a life of prayer and meditation. We believe that the fruit of an authentic prayer life is an expanded heart that is more ready to love, forgive, bless and rejoice. There should be some evidence that the candidate has truly sought to develop these capacities in his interactions with others, as well as in the way he relates to himself. The candidate should also show a readiness for praying in silence and solitude, as well as openness to praying with the community, particularly in the celebrations of the Eucharist and the Liturgy of the Hours. He should spend a portion of his free time reading works on spirituality, prayer, and the religious life. He should be able to articulate in some way the place that the Gospels have in his life, and how he strives to live the Gospel message along with the Church.

Intellectually, the candidate has normally earned a bachelor’s degree or equivalent. He has spent some time studying his faith through both scripture and theology, at the college level or a graduate school of theology, in such a way that he is prepared for ministry as an intern after the novitiate. Where possible and advisable, other ministry-related courses (e.g.: liturgy, education, leadership, etc.) are to be encouraged. This level of readiness is to be determined by the local formation team in consultation with the provincial or provincial director of formation as part of the overall evaluation of a candidate’s readiness for the novitiate.

Psychological readiness is best described in terms of abilities and capacities.

1. The candidate has shown the capacity for achieving personal friendships on the basis of individual relationships as well as group membership. He also manifests the behavior such relationships demand: trusting, sharing and self-disclosure, fulfilling promises, keeping confidences, and meeting the needs of others.
2. He has learned to make decisions, choose values, and take responsibility independent of home and family. This achievement is reflected in his ability to work effectively and in his ability to meet his own needs.
3. He has developed broad intellectual curiosity, realistic idealism, and the capacity to be inner directed in his awareness of and response to change. These qualities are reflected in his ability to respond creatively and positively to criticism and supervision, to be interdependent, to be reflective and affective emotionally, and to develop effective problem-solving techniques

The Church gives further guidance in writing on what is necessary for the novitiate experience: pp. 31-39

1. It is presumed that a sufficient degree of human and Christian maturity is presumed in those entering the novitiate.
2. A general cultural foundation, which should correspond to what is generally expected of persons who have achieved the normal education of their country. It is particularly necessary that future novices attain a facility in the language used in the novitiate. Since this is a matter of basic culture, it will be important to take into account the conditions of certain countries or social environments where the level of schooling is still relatively low, but where the Lord is nonetheless calling candidates to the religious life. Thus, it will be necessary to promote the original culture carefully and not assimilate it into a foreign culture. It is within their own culture that candidates must recognize the call of the Lord and respond to it in a personal way.
3. The person should have a balanced affectivity, especially sexual balance, which presupposes the acceptance of the other, man or woman, respecting his or her own difference. Recourse to a psychological examination can be useful, taking into account the right of each person to preserve his or her own privacy.
4. The ability to live in community under the authority of superiors in a particular institute. This capacity certainly will be verified further during the course of the novitiate, but the question should be posed in advance. Candidates should be well aware of the fact that other ways exist by which to give all of one's life to the Lord apart from entering religious life.

## APPENDIX 6

### Preparing the Internship Learning Contract

The following is offered as an aid for a new intern and his supervisor in preparing the intern's Learning Contract. See Form L (p. 108) for the contract form itself.

#### **Issues having to do with personal growth and faith development:**

- taking responsibility for my own growth and evaluation
- sensitivity to my own insights and intuitions
- ability to make firm decisions
- awareness of and ability to deal with my feelings (e.g. anger, affection, etc.)
- management of time
- responsible risk taking
- understanding and application of "academic" learning in this setting
- development of self-confidence
- ability to face the ambiguities of life, the struggles of faith, and the challenges of the ministry
- consciousness of God's redeeming activity in life and my ability to reflect theologically on that experience
- awareness of my need for prayer and/or spiritual disciplines

#### **Issues having to do with one's capacity to understand, be sensitive to, and relate with others:**

- ability to accept the value and diversity of people (ages, races, cultures)
- openness to working cooperatively with people who are culturally and theologically different from me
- reaching out to persons, including my peers, who are under stress, with perception, sensitivity, and warmth that is freeing and supportive
- ability to develop trusting relationships
- ability to correlate my leadership with that of others
- sensitivity to sexuality of persons (self and others)

#### **Issues having to do with one's function as a minister and/or religious leader:**

- ability to accept the value in diversity of people (ages, races, cultures)
- understanding of what being minister/pastor/religious leader means in this setting
- acceptance of the role of minister/leader in the religious community
- ability to earn, own, and exercise authority
- ability to cope with the tension between my own image as minister and the image or role thrust on me by others
- acceptance of the leadership of others in positions of authority in my religious community
- appreciation of the doctrines of my religious community
- acceptance of the limitations and strengths of institutional religion

- understanding of the relationship between personal faith and the faith that is expressed in the community of believers

Note: Students and supervisors should feel free and be encouraged to re-state issues listed above and develop their own issues for purposes of goal planning and evaluation.

**Issues having to do with the skills of ministry/leadership:**

- capacity to set appropriate goals and to select reasonable strategies for action in this field setting
- ability to facilitate the building of community in this setting
- ability to understand and work with groups
- ability to think and act from theological and ethical bases.
- development of skills appropriate to this setting (preaching, teaching, pastoral care/counseling, and administration)
- ability to understand and learn about the nature of institutions, structures and systems
- ability to respond appropriately as a minister/leader and change agent as I begin to understand appropriate skills needed for this setting and learn how to use those skills
- ability to communicate the Gospel
- ability to recognize, understand, and cope with conflict
- ability to maintain proper boundaries
- ability to recognize dual relationships

**Issues having to do with recognizing and analyzing problems, providing appropriate services to alleviate consequences and to change the sources of those problems:**

- sensitivity to social justice issues
- concern for and active ministry with the oppressed
- ability to raise social justice issues to the attention of the community
- ability to alter forces operating for and against human/social change
- understanding of how the Gospel Message can be realized, given these forces
- understanding of how justice/love can be realized, given these forces
- awareness of the complexities of giving appropriate service
- experience of seeing changes take place in the institutional structures/systems as a result of my involvement in this setting
- awareness of being involved in oppression and my openness and ability to change understanding how change occurs in institutional structures and systems and learning to struggle to bring this about
- responding flexibly to exterior challenges in ministry such as the COVID-19 pandemic and its effect on pastoral ministries
- sensitivity to the issues highlighted in Pope Francis' 'Laudato Si' and its implementation in Carmelite communities and ministries

## APPENDIX 7

### Internship in a Secondary School

#### Placement Considerations:

Once it is decided that an individual is to be assigned to a high school for the internship experience, the provincial, or the one delegated by him, needs to be appraised of the level of teaching experience and/or other significant factors regarding the skills and qualifications of the potential intern.

#### Assignment of Duties:

Depending upon the information above, then the placement and subsequent assignment of duties need to be agreed upon by the school, in conjunction with the one responsible for the placement of the intern, before the intern is actually assigned.

If the person to be placed has had previous experience and/or training in secondary education, the Province's expectation is that the individual will be assigned to a full-time position in the school and will receive a full-time salary with benefits appropriate to the level of experience.

If the person to be placed does not have sufficient experience and/or training in secondary education then a phased in approach towards the goal of a full-time position in the school, during the course of a person's internship experience, may be more beneficial to both the school and the individual.

#### Professional Development:

The course of the gradual immersion towards full-time responsibility in the school should be similar to what follows:

##### Year 1:

One or two teaching periods and one or two periods of involvement in campus ministry and/or other co/extracurricular areas, for a total of 2-4 periods of assigned duties. The intern's salary and benefits will be calculated accordingly.

The school will assign a "master teacher" or mentor for the intern to meet regularly with the intern for the development of teaching skills, classroom management, evaluation, etc. The school will make opportunities available for the intern to observe various class situations.

The intern will enroll at a local university and take 2-4 education courses. (The school is not responsible for the financial obligations associated with the taking of these courses). The school, with the intern and the Carmelite Director of Interns will evaluate the progress of the intern near the conclusion of the first year. Recommendations from the evaluation are to be implemented for the following year.

## **Year 2:**

The expectation of the Carmelites for the formation of the intern is that by the beginning of the second year of internship, the intern will have a full-time position in the school, by a combination of classroom teaching experience with other assigned duties; e.g., campus ministry, substitutions, study hall proctoring, etc. The salary and benefits should reflect the full-time status of the intern.

The school will continue to have a “master teacher” for the intern, but the level of mentoring may not need to be at the same level as in the first year.

Depending upon the progress of the intern as a teacher, the intern may or may not need additional opportunities to observe other classroom situations.

It is recommended that the intern continue to progress in professional training in secondary education at a local university.

## **Placement Timeline:**

Important to the success of the intern’s experience in a secondary educational setting is the degree of cooperation and acceptance of the goals and objectives of the Carmelite internship experience as outlined in this manual (pp. 43-46). The administration of a school must support the goals and objectives of the internship program in order to have an intern placed at the institution. Since it is important that there be good, clear communication between the school, the Province, and the intern the following timeline should be adhered to:

1. In late March or early April, prior to the conclusion of the novitiate year, or the first year of theological studies, the Provincial or his delegate, will communicate to the school the desire to place an intern at that particular school. The school will be informed of the intern’s qualifications and experience.
2. Within 10 days of this initial conversation, the school must decide whether or not to accept the intern. If the school accepts the intern, then a process of determining the scope of the intern’s responsibilities for the first year begins immediately. By the end of April, or the very beginning of May, the principal of the school should contact the intern to begin a discussion of what those responsibilities will be.
3. By June 1, a tentative agreement of assigned duties within the school should be reached between the school and the intern.
4. By July 1, the assigned duties of the intern within the school must be finalized and the appropriate materials forwarded to the intern for his preparation to begin his duties. The financial arrangements as to salary should also be finalized by this time.

## APPENDIX 8

### Praesidium, Inc.

The Province of the Most Pure Heart of Mary and the Province of Saint Elias have subscribed to the Standards of Praesidium, Inc., for creating and assuring safe environments for children and vulnerable adults. Praesidium, Inc., a national leader in abuse risk management, assists through consultation in the writing of policies and procedures, reviews how the Provinces have operationalized these policies and procedures and determines whether full compliance has occurred with all its Standards.

Both Provinces have received full accreditation from Praesidium, Inc. for their continuing provision of ethical ministry for children and vulnerable adults. Praesidium, Inc. is contracted by the Conference of Major Superiors of Men (CMSM) to assist male Religious Orders in adhering to the 2002/2011 Charter of the United States Catholic Bishops Conference (USCCB), ensuring the provision of safe environments for minors and vulnerable adults.

#### Standards for Formation

Praesidium Standards listed below more specifically apply to programs and participants involved with religious formation. Members of the Provinces, noted below in the Standards, include all in formation. Both Provinces have developed Policy Manuals that incorporate and elucidate all of the 20 Standards of Praesidium, revised in 2020.

#### Standards Specifically Directed Towards Members in Formation:

Standard 5: The Institute screens new Candidates for a history of sexually abusing minors or violating the boundaries of minors.

R1. The Institute requires each Candidate who has applied for membership into the Institute during the review period to complete:

- a. A background check, which includes:
  - Multi-state criminal records search;
  - National sex offender registry check;
  - Social-security-number trace and alias search; and
  - Individual county level search in every county the Candidate has lived, worked, or attended school over the last seven years.

If a background check is not possible due to the international limitations, the reason is documented.

- b. A minimum of three documented personal references (including at least one from a family member) and two professional references, for a total of five references;
- c. Face-to-face interviews with more than one representative of the Institute;
- d. A psychological evaluation conducted by a licensed psychologist;

- e. A psycho-sexual history conducted by either a licensed psychologist or a licensed mental health professional with skills in conducting psycho-sexual histories and in assessing psycho-sexual health in preparation for a life of celibate chastity; and
- f. A review of publicly accessible content on all social media, personal blog sites, and websites associated with accounts controlled by the Candidate.

R2. The Institute ensures a Candidate who has an established allegation of sexually abusing a minor in his past, or who has acquired, downloaded, and/or intentionally viewed images of child abuse, will not be permitted to continue Membership in the Institute.

R3. The Institute ensures vocation directors and formation directors are able, by education, training, or experience, to identify Candidates who may be at risk to sexually abuse a minor.

Standard 6: The Institute provides specialized support and accountability at each stage in the initial formation of Members.

Specific Requirements of Standard 6:

R1. The institute ensures Members in formation are educated on how to develop a mature, integrated sexuality as a foundation for celibate chastity.

R2. The Institute ensures Members in formation are educated on appropriate boundaries, including cultural competencies and behavioral norms relevant to the ministries in which they serve.

R3. The Institute ensures members in formation are encouraged to identify and address challenges to maintain celibate chastity and healthy intimate relationships.

R4. The Institute ensures a Member in formation who sexually abuses a minor will be dismissed.

R5. The Institute ensures a Member in formation who is unable to maintain appropriate boundaries with minors, despite guidelines and instruction, will not be permitted to continue in formation.

R6: The Institute ensures Members in formation are educated about the requirements and procedures for reporting boundary violations, misconduct, harassment, and abuse to the proper criminal, civil, and ecclesiastical authorities.

Standard 8: The Institute has established and published clear policies for boundaries with minors.

Specific requirements of Standard 8:

R1. The Institute's policies for boundaries with minors identify those interactions that the Institute prohibits for Members under all circumstances, including in social and familial settings and via electronic communications and social media.

R2. The Institute's policies for boundaries with minors identify positive forms of affection and



demonstration of pastoral care that would be appropriate for Members under most circumstances.

R3. The Institute ensures members know and can describe the policies for boundaries with minors.

R4. The Institute requires all Members to sign a statement indicating they have read and understand the policies for boundaries with minors at least once during each Accreditation cycle.

Standard 9: The Institute educates its Members on the knowledge and skills necessary for preventing and responding to abuse.

Standard 10: The Institute interrupts and intervenes when a Member violates the Institute's policies regarding boundaries with minors.

Standard 12: The Institute reports known or suspected abuse of children who are still minors to civil authorities.

Specific requirements of Standard 12:

R1. The Institute ensures Members are educated in their obligations to report all allegations of known or suspected sexual abuse of a minor regardless of the civil mandatory reporting laws of the jurisdiction.

R2. The Institute requires Members to report all known or suspected sexual abuse of a survivor who is currently a minor to the appropriate authorities, whether alleged to have been perpetrated by a current, former, or deceased Member or a non-Member.

R3. The Institute requires Members to report known or suspected possession, distribution, downloading and/or viewing images of child abuse to appropriate civil authorities.

R4. The Institute reports known or suspected sexual abuse of a minor by a current, former, or deceased Member when the survivor is no longer a minor, as obligated by the civil laws of the state where the sexual abuse of the minor allegedly occurred.

## Appendix 9

### Summer Requirements/ Options

Formations Requirements over the 8-year formation program:

- Spanish or English Immersion Experience
- Academics
- Clinical Pastoral Education (CPE)
- 30 Day Solemn Profession Retreat
- Parish Diaconate Experience

#### **Pre-Novitiate - 1 (or more years)**

No summer program between pre-novitiate and novitiate---unless someone needs to finish their undergraduate degree or has a substantive amount of- pre-theology requirements to complete.

**Novitiate---1 year** - with more or all their Philosophy and Pre-theology requirements done- if possible. Undergraduate studies must be completed.

**Summer 1: Academic Studies/ S/E Language Immersion**

#### **Post Novitiate**

Theology 1<sup>st</sup> or 2<sup>nd</sup> year

**Summer 2: Move to Internship/ S/E Language Immersion**

Internship

**Summer 3: CPE/Academic Studies/ S/E Language Immersion**

Internship

**Summer 4: CPE/Academic Studies/ S/E Language Immersion/ Alternative program**

Theology 2<sup>nd</sup> or 3<sup>rd</sup> year

**Summer 5: 30 Day Summer Profession Retreat---obviously this depends on the timing/petitioning for Solemn Profession by an individual/CPE/ S/E Language Immersion/Academic Studies**

Theology 3<sup>rd</sup> or 4<sup>th</sup> year

**Summer 6: Diaconate Experience**

# FORMS



**FORM A**

**Application Process Checklist**

Name of Applicant \_\_\_\_\_

1. Applicant Inventory Form C \_\_\_\_\_
2. Application for Admission to the Formation Program Form D \_\_\_\_\_
3. Autobiography \_\_\_\_\_
4. Letters of recommendation (suggested areas listed below))

Letters of Recommendation

-

- A) Family (at least 2 members) \_\_\_\_\_
- B) Carmelite (if you know one) \_\_\_\_\_
- C) Professional---(at least 3 references) \_\_\_\_\_
- C-1---Parochial/Other Minister \_\_\_\_\_
- C-2---Education \_\_\_\_\_
- C-3---Employer or Supervisor \_\_\_\_\_
- C-4---Spiritual Director (if you have one) \_\_\_\_\_
- D) Other Personal Reference

5. Academic Transcripts: 2 Official Transcripts---one sent to the Vocation Office and one to be sent to the College/University Admission Office.

Undergraduate \_\_\_\_\_ Graduate \_\_\_\_\_ Post Graduate \_\_\_\_\_

6. Sacramental Certificates:

Baptism \_\_\_\_\_ Confirmation \_\_\_\_\_

7. Marriage Records (if applicable)

Marriage \_\_\_\_\_ Divorce Decree \_\_\_\_\_ Annulment \_\_\_\_\_

8. Copies of Legal Documents

- 8-1---Birth Certificate \_\_\_\_\_
- 8-2---Driver's License \_\_\_\_\_
- 8-3---Passport \_\_\_\_\_
- 8-4---Social Security Card \_\_\_\_\_

9. Vocation Retreat Date: \_\_\_\_\_
10. Medical History Form and Immunization Form I  
HIV Test \_\_\_\_\_ requested with blood testing  
(Should we or should we not require COVID -19 vaccinations?)
11. Psychological Evaluation \_\_\_\_\_
12. Two Personal Interviews (Provincial and another Carmelite) \_\_\_\_\_)
13. A) Criminal Background Check \_\_\_\_\_  
B) Credit Check \_\_\_\_\_  
C) Social Media Check \_\_\_\_\_  
D) National Sex Offender Registry Check
14. INS Documentation (if applicable) \_\_\_\_\_
15. Praesidium---Form H2 -----

**Form B  
FORMATION FILE**

**NAME:**

**DATE OF ACCEPTANCE:**

<b>APPLICATION FILE</b>	<input checked="" type="checkbox"/>	<b>DATE</b>
<b>Originals copies of ALL the Application File go to the Provincial Office.</b>		
Applicant's Personal Inventory Form C		
Application for Admission Form D		
Praesidium Background Check Consent Form H-1		
Praesidium Background Check		
Sex Offenders Registry Check		
Psychological Evaluation: Dated and signed by the Licensed Psychologist including Psychosexual History		
Autobiography		
Personal Ltr of Recommendation (1)		
Family Ltrs of Recommendation (2)		
-Carmelite Ltr. of Rec.		
Professional Ltr of Recommendation		
Professional Ltr of Recommendation		
Professional Ltr of Recommendation		
Carmelite Interview		
Carmelite Interview		
Academic Transcripts		
Birth Certificate		
Marriage Records – if applicable		
Baptism Certificate		
Confirmation Certificate		
Medical Examination		
Driver's License Copy		
Passport Copy		
SSN Copy		
INS Documentation: If required		
<b>PRE-NOVITIATE</b>	<input checked="" type="checkbox"/>	<b>DATE</b>
Date of Entrance in to the Pre-Novitiate		
Application Information		
Autobiography		
Psychological Evaluation		
Medical Transcripts		
Academic Transcripts		
Pre-Novitiate Director's Evaluation		
Pre-Novice Self Evaluation		
House Chapter Vote Letter		
Petition Letter for the Novitiate		
Ethical Ministry Certificate/Virtus		

<b>NOVITIATE</b>	<input checked="" type="checkbox"/>	<b>DATE</b>
Pre-Novitiate Director's Evaluation		
Pre-Novice's Self Evaluation		
Pre-Novitiate House Chapter Vote		
Petition Letter for the Novitiate		
Psychological Evaluation destroyed at the end of the Novitiate		
Application Information		
Autobiography		
Medical Transcripts		
Academic Transcripts		
Novice Directors' Evaluation		
Recommendation 3 <sup>th</sup> Month		
Recommendation 6 <sup>th</sup> Month		
Recommendation 9 <sup>th</sup> Month		
Recommendation 11 <sup>th</sup> Month		
Petition for Simple Vows		
Vow Formula		

<b>INTERN FILE</b>	<input checked="" type="checkbox"/>	<b>DATE</b>
Internship Contract		
Intern Supervisor's Evaluation 1 <sup>st</sup> Year		
Intern Supervisor's Evaluation 2 <sup>nd</sup> Year		

<b>WHITEFRIARS HALL</b>	<input checked="" type="checkbox"/>	<b>DATE</b>
Evaluations for Renewal of Vows		
Recommendations for Renewal of Vows		
House Chapter Vote Vow Renewal Letter		
Petition for Renewal of Vows		
Evaluations for Solemn Vows		
Petition for Solemn vows		
Recommendations for Solemn Vows		
House Chapter Vote Solemn Vows Letter		
Solemn Vows Formula		
Installation as Lector		
Installation as Acolyte		
Declarations of Faith & Freedom		
Petition for Orders - Diaconate		
House Chapter Vote Letter		
Petition for Orders - Priesthood		

**WHEN SOMEONE LEAVES THE ORDER**

Final Statement with Recommendation sent to the Provincial Office		
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When a person leaves or completes the formation program, his traveling file is sent to the Provincial Office for cross-checking and then destruction.

**FORM C**

**Applicant's Personal Inventory Form**

By completing the following you are not making an application to become a Carmelite, but merely showing some additional interest in our Carmelite way of life. It will help greatly in your discernment process.

Last Name \_\_\_\_\_ First Name \_\_\_\_\_ MI \_\_\_\_\_

Telephones (\_\_\_\_\_) \_\_\_\_\_ (\_\_\_\_\_) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Email \_\_\_\_\_

Age \_\_\_\_\_ Date of Birth: (mm/dd/yy) \_\_\_\_\_

Place of Birth \_\_\_\_\_

Are you an American Citizen? \_\_\_\_\_

If not, what is your current immigration status?

\_\_\_\_\_

Do you have any physical handicaps, nervous disorder, past serious illness, or have you been hospitalized for a long period? \_\_\_\_\_

If "Yes," please explain:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Have you ever received professional counseling? \_\_\_\_\_

If "Yes," please explain:

\_\_\_\_\_

\_\_\_\_\_

Education Completed (yrs) \_\_\_\_\_

School last attended or graduated \_\_\_\_\_

Nature of Degree \_\_\_\_\_ Major Field \_\_\_\_\_

Are you, or have you ever been married? \_\_\_\_\_

Do you have any dependents? (Children, relatives, etc.)

\_\_\_\_\_  
\_\_\_\_\_

Do you currently live with your parents? (Mother) \_\_\_\_\_ (Father) \_\_\_\_\_

Number of Brothers: \_\_\_\_\_ Number of Sisters: \_\_\_\_\_

Are you or have you been in the Military Service, Military Reserves, or National Guard? \_\_\_\_\_

Which branch? \_\_\_\_\_ How long? \_\_\_\_\_

Are you currently employed? (Full-time) \_\_\_\_\_ (Part-time) \_\_\_\_\_

If "Yes", please name type of work and employer:

\_\_\_\_\_  
\_\_\_\_\_

Do you have any financial debts? \_\_\_\_\_ If "Yes," please give details:

\_\_\_\_\_  
\_\_\_\_\_

Have you ever been arrested? \_\_\_\_\_ If "Yes," please give details:

\_\_\_\_\_  
\_\_\_\_\_



What parish do you now attend? (Parish) \_\_\_\_\_

(City) \_\_\_\_\_ (State) \_\_\_\_\_

Are you a convert? \_\_\_\_\_

If so, please give the date of your reception into the Catholic Church: \_\_\_\_\_

How often do you ordinarily: (a) Attend Mass \_\_\_\_\_

(b) Receive Communion \_\_\_\_\_

(c) Receive the Sacrament of Reconciliation \_\_\_\_\_

Parish involvement or ministry (e.g., server, lector, religious education instructor, minister of the Eucharist, choir member, parish council member, etc.):

---

---

---

Have you consulted a priest about your vocation? \_\_\_\_\_

If so, please give his name and address:

---

---

---

Have you ever been a member, novice or candidate in a Religious Order or a student in a seminary?

\_\_\_\_\_

If "Yes," please give the name of the institution and the dates of affiliation:

---

---

---

Where did you first get the idea of possibly becoming a Carmelite?

---

---

---

How long ago was this? \_\_\_\_\_

What are you reasons for considering the Carmelite life?

---

---

---

I am interested in being a: Priest \_\_\_\_\_ Brother \_\_\_\_\_

Check the areas of Church Ministry which interest you at this time:

- Parish Work       Teaching       Retreat Work
- Hospital Chaplaincy       Youth Ministry       Mission Work
- Other \_\_\_\_\_

## FORM D

### Application for Admission to the Formation Program

#### Instructions:

As an applicant for admission into the Carmelite Formation Program you are asked to supply the following information about yourself. Additional information will be obtained from documents such as scholastic transcripts, references submitted by the persons who know you well, baptismal certificate, etc. You will also be interviewed by Carmelites.

The purpose of gathering this preliminary information is to assist you and the vocation director in determining whether God may be calling you to service as a Carmelite. To act without this information would be to run the risk of admitting you to a life for which you may not be suited.

It is important you be frank and honest. Of course, you are free to withdraw your application if you do not wish the vocation director to become acquainted with any facts about your life. Information you do provide will be assumed to be perfectly true and kept confidential.

*(Please print or type all your answers)*

Last names \_\_\_\_\_ First & Middle Names \_\_\_\_\_

Telephones (\_\_\_\_) \_\_\_\_\_ (\_\_\_\_) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Mailing Address (if different) \_\_\_\_\_

\_\_\_\_\_

Email \_\_\_\_\_

Age \_\_\_\_\_ Date of Birth: (mm/dd/yy) \_\_\_\_\_

Place of Birth \_\_\_\_\_

Present Parish \_\_\_\_\_

\_\_\_\_\_

Church of your Baptism \_\_\_\_\_

Address of this Church \_\_\_\_\_

If you have lived continuously for more than a year at an address other than your present home address (except to go to school), complete (a) and (b).

a) Parish \_\_\_\_\_

Diocese \_\_\_\_\_ Dates of Residence \_\_\_\_\_

Home address during these dates \_\_\_\_\_

\_\_\_\_\_

b) Parish \_\_\_\_\_

Diocese \_\_\_\_\_ Dates of Residence \_\_\_\_\_

Home address during these dates \_\_\_\_\_

\_\_\_\_\_

High School attended \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Graduation Date \_\_\_\_\_

College attended \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Years completed \_\_\_\_\_

Degree attained \_\_\_\_\_ Major field \_\_\_\_\_ Graduation date \_\_\_\_\_

Graduate School attended \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Years completed \_\_\_\_\_

Degree attained \_\_\_\_\_ Major field \_\_\_\_\_ Graduation date \_\_\_\_\_

Selective Service Data (U.S.A.) \_\_\_\_\_

Veteran (yes or no) \_\_\_\_\_ If "Yes," which branch? \_\_\_\_\_

Service number (if registered) \_\_\_\_\_

Date of Discharge \_\_\_\_\_

Father's name \_\_\_\_\_ Religion \_\_\_\_\_

Present address \_\_\_\_\_

Occupation \_\_\_\_\_

Business address \_\_\_\_\_

Mother's name \_\_\_\_\_ Religion \_\_\_\_\_

Present address \_\_\_\_\_

Occupation \_\_\_\_\_

Business address \_\_\_\_\_

Please give the name and addresses of any brothers and sisters:

1. \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

2. \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

3. \_\_\_\_\_

---

---

4. \_\_\_\_\_

---

---

Please list your employment history or attach a resume

1. Name of employer \_\_\_\_\_

Business address \_\_\_\_\_

---

Nature of work \_\_\_\_\_

Dates \_\_\_\_\_

2. Name of employer \_\_\_\_\_

Business address \_\_\_\_\_

---

Nature of work \_\_\_\_\_

Dates \_\_\_\_\_

3. Name of employer \_\_\_\_\_

Business address \_\_\_\_\_

---

Nature of work \_\_\_\_\_

Dates \_\_\_\_\_

Have you ever applied for admission to either a diocesan seminary or religious community?

\_\_\_\_\_

If "Yes," please give details: \_\_\_\_\_

\_\_\_\_\_

Do you have any financial debts? \_\_\_\_\_

If "Yes," please give details: \_\_\_\_\_

\_\_\_\_\_

Have you ever been arrested? \_\_\_\_\_

If "Yes," please give details: \_\_\_\_\_

\_\_\_\_\_

Request for Letters of Recommendations:

Please provide the names, addresses and phone numbers of the person or persons in each of the following categories. They will be contacted by the Vocation Director.

Letters of Recommendation

-

A) Family (at least 2 members) \_\_\_\_\_

B) Carmelite (if you know one) \_\_\_\_\_

C) Professional---(at least 3 references) \_\_\_\_\_

C-1---Parochial/Other Minister \_\_\_\_\_

C-2---Education \_\_\_\_\_

C-3---Employer or Supervisor \_\_\_\_\_

C-4---Spiritual Director (if you have one)

D) Personal/Friend

## FORM E

### Applicant's Release Form

#### Permission to request information on a Candidate

In order to facilitate the admissions process, I give my permission for the Carmelite Vocation Director and/or the Prior Provincial and his Secretary to request information in writing from those listed on the **Carmelite Application for Admission** as well as the psychologist who administers my psychological evaluation.

If I have previously been in a seminary, diocese or religious community, I also give permission for them to contact those persons who were responsible for my formation. This may include former and present rectors, bishops, vocation directors and formation directors.

I understand that this information will be shared with the Admissions Board and future formation directors of the houses where I live while in formation. I also understand that Praesidium Inc. may request to look at my files. I understand that this will be done in a confidential manner and only on a "need to know" basis.

Signature:

Name:                      Date (mm/dd/yyyy)



**FORM H-1**

**Release of Information for Background Checks**

Please initial each of the statements below:

\_\_\_\_\_ I hereby authorize the Carmelites to conduct a personal and professional background check current employers, church, youth organizations, agencies where volunteer service has been completed, and any individual or organization which might be relevant to my desired position.

\_\_\_\_\_ I hereby release all of the above stated persons from any and all liability for damages that might occur during the Carmelites' contract with the individuals for purposes of employment or volunteer services.

\_\_\_\_\_ I also hereby give complete permission for the Carmelites to conduct a criminal background check, arrest records check, -, National Sex Offender Registry Check, and driving record check for the purposes of my employment or volunteer services.

\_\_\_\_\_ I waive any right that I may have to inspect any information provided about me by the persons previously mentioned. I have also read and understand the above-stated information within this release and am signing below of my own free will.

\_\_\_\_\_ I understand that a criminal background check of at least ten years will be conducted prior to and during my service. I authorize investigations of all statements contained in my application.

\_\_\_\_\_ I have reviewed and agree to observe all of the Carmelite guidelines and policies for members.

\_\_\_\_\_ I understand that the Carmelites take all allegations of abuse seriously. I further understand that the Carmelites cooperate fully with the authorities to investigate all cases of alleged abuse. Abuse of minors or vulnerable adults is grounds for immediate dismissal from the formation program and possible criminal charges.

\_\_\_\_\_ I declare that I have not perpetrated physical abuse, sexual abuse, emotional abuse or neglect against a minor or a vulnerable adult and that I have never been accused of these acts. (If an alleged abuse has occurred, please explain the circumstances and outcomes on the back of this page.)

\_\_\_\_\_ I understand that I can withdraw from the application process at any time.

\_\_\_\_\_ I understand and agree that false statements and/or omissions regarding past conduct and/or present situations may be grounds for denial of the application for membership and that refusal to inform the Carmelites of the contents of a sealed criminal record will result in the automatic denial of the application.

\_\_\_\_\_  
Name of Applicant

\_\_\_\_\_  
Date



**Form H-2 DISCLOSURE AND AUTHORIZATION  
FOR THE CARMELITES TO ACCESS CONSUMER REPORTS**  
DISCLOSURE

In connection with your application for employment with the Carmelites (including any independent contract for services and volunteer work) or when deciding whether to modify or continue your ongoing employment (if hired), the Carmelites may obtain a "consumer report" and/or an "investigative consumer report" on you from Praesidium, Inc., a consumer reporting agency, or from any third party, in strict compliance with both state and federal law. A consumer report is a communication of information by a consumer reporting agency bearing on your credit worthiness, credit standing, credit capacity, character, general reputation, personal characteristics, or mode of living which is used or expected to be used for purposes of serving as a factor in establishing your current and/or continuing eligibility for employment purposes. An investigative consumer report is a report obtained through personal interviews with individuals who may have knowledge of your character, general reputation, personal characteristics, or mode of living. The consumer reports or investigative consumer reports may contain information regarding your credit history (if applicable to position), criminal records, driving history records, education records, previous employment history, social security traces, military records, professional licensure records, drug testing, government records, and other types of background information. You further understand that these reports may contain information concerning the reasons for termination of past employment. You are hereby notified that you have the right to make a timely request for the nature and scope of any investigative consumer report. You are further notified that, prior to being denied employment based in whole or in part on information obtained in the consumer report, you will be provided a copy of the report, the name, address and telephone number of the consumer reporting agency and a description in writing of your rights under the Fair Credit Reporting Act. Inquiries to Praesidium, Inc. should be directed to Praesidium, Inc.; Consumer Disputes; P.O. Box 202002 Arlington, TX 76006. 1 (800) 743 -6354.

**MAINE AND NEW YORK APPLICANTS OR EMPLOYEES ONLY:** You have the right to inspect and receive a copy of your investigate consumer report requested by the Carmelites by contacting the consumer reporting agency identified directly above.

**AUTHORIZATION**

I hereby authorize, without reservation, the obtaining of "consumer reports" or "investigative consumer" reports by the Carmelites at any time after receipt of this authorization and throughout my employment, or service, if applicable. I further authorize and request, without reservation, any present or former employer, school, police department, state or federal agency, financial institution, division of motor vehicles, consumer reporting agencies, or other persons or agencies having knowledge about me to furnish Praesidium, Inc. or the Carmelites with any and all background information in their possession regarding me, so that my employment qualifications may be evaluated and/or reassessed. I also agree that a fax or photocopy of this authorization with my signature should have the same authority as the original.

By signing below, I certify: (1) that I have read and fully understand this disclosure and authorization; (2) that all of the information I am providing is true, complete, correct and accurate; and (3) that I have received the attached Summary of Your Rights under the Fair Credit Reporting Act (15 U.S.C. §1681 et seq.).

**MAINE AND NEW YORK APPLICANTS OR EMPLOYEES ONLY:** You have the right to inspect and receive a copy of your investigate consumer report requested by [EMPLOYER NAME] by contacting the consumer reporting agency identified directly above. **NEW YORK APPLICANTS OR EMPLOYEES ONLY:** By signing below, you acknowledge receipt of Article 23-A of the New York Correction Law.

**MINNESOTA AND OKLAHOMA APPLICANTS OR EMPLOYEES ONLY:** Please check this box if you would like to receive a copy of a consumer if one is obtained by the Company.

**CALIFORNIA APPLICANTS OR EMPLOYEES ONLY:** By signing below, you also acknowledge receipt of the NOTICE REGARDING BACKGROUND INVESTIGATION PURSUANT TO CALIFORNIA LAW. Please check this box if you would like to receive a copy of an investigative consumer report or consumer credit report at no charge if one is obtained by the Company whenever you have a right to receive such a copy under California law.

The following is information required in order for the Carmelites to obtain a complete consumer report:

**Please Print Clearly:**

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ MI: \_\_\_\_\_

Please print any other names you have used: \_\_\_\_\_

Email Address: \_\_\_\_\_

**Current Address:**

Current Address: \_\_\_\_\_

City, State, Zip Code: \_\_\_\_\_

Phone Number: \_\_\_\_\_ How long have you lived at this address? \_\_\_\_\_

**Previous Address:**

Previous Address: \_\_\_\_\_  
City, State, Zip Code: \_\_\_\_\_  
I lived at this address from: \_\_\_\_\_ to \_\_\_\_\_  
Month and Year Month and Year

**Overseas Address:**

Previous Address: \_\_\_\_\_  
City, Country, Zip Code: \_\_\_\_\_  
I lived at this address from: \_\_\_\_\_ to \_\_\_\_\_  
Month and Year Month and Year

**Additional Information:**

Date of Birth: \_\_\_\_\_ Social Security Number: \_\_\_\_\_  
Driver's License Number: \_\_\_\_\_ State of License: \_\_\_\_\_ Sex: Male / Female

**Information for International Background Checks:**

Mother's Maiden Name: \_\_\_\_\_ International ID Number: \_\_\_\_\_  
Passport Number: \_\_\_\_\_ NCRI Number: \_\_\_\_\_  
Foreign Resident ID: \_\_\_\_\_ Other: \_\_\_\_\_

\_\_\_\_\_  
CONSUMER'S SIGNATURE\_\_\_\_\_  
DATE

\* This information will be used for background screening purposes only.

**NOTICE REGARDING BACKGROUND INVESTIGATION PURSUANT TO CALIFORNIA LAW**

The Carmelites (the "Company") intends to obtain information about you for employment purposes from an investigative consumer reporting agency or consumer credit reporting agency. Thus, you can expect to be the subject of "investigative consumer reports" and "consumer credit reports" obtained for employment purposes. Such reports may include information about your character, general reputation, personal characteristics and mode of living. With respect to any investigative consumer report from an investigative consumer reporting agency ("ICRA"), the Company may investigate the information contained in your employment application and other background information about you, including but not limited to obtaining a criminal record report, verifying references, work history, your social security number, your educational achievements, licensure, and certifications, your driving record, and other information about you, and interviewing people who are knowledgeable about you. The results of this report may be used as a factor in making employment decisions. The source of any investigative consumer report (as that term is defined under California law) will be **Praesidium, Inc.; P.O. Box 202002 Arlington, TX 76006. 1 (800) 743 - 6354.**

The source of any credit report will be **Praesidium, Inc.; P.O. Box 202002 Arlington, TX 76006. 1 (800) 743 - 6354.** The Company agrees to provide you with a copy of an investigative consumer report when required to do so under California law. Under California Civil Code section 1786.22, you are entitled to find out from an ICRA what is in the ICRA's file on you with proper identification, as follows: In person, by visual inspection of your file during normal business hours and on reasonable notice. You also may request a copy of the information in person. The ICRA may not charge you more than the actual copying costs for providing you with a copy of your file. A summary of all information contained in the ICRA's file on you that is required to be provided by the California Civil Code will be provided to you via telephone, if you have made a written request, with proper identification, for telephone disclosure, and the toll charge, if any, for the telephone call is prepaid by or charged directly to you.

By requesting a copy to be sent to a specified addressee by certified mail. ICRA's complying with requests for certified mailings shall not be liable for disclosures to third parties caused by mishandling of mail after such mailings leave the ICRA's.

"Proper Identification" includes documents such as a valid driver's license, social security account number, military identification card, and credit cards. Only if you cannot identify yourself with such information may the ICRA require additional information concerning your employment and personal or family history in order to verify your identity.

The ICRA will provide trained personnel to explain any information furnished to you and will provide a written explanation of any coded information contained in files maintained on you. This written explanation will be provided whenever a file is provided to you for visual

inspection.

You may be accompanied by one other person of your choosing, who must furnish reasonable identification. An ICRA may require you to furnish a written statement granting permission to the ICRA to discuss your file in such person's presence.

---



Family Member	Occupation	Health Status Excellent/Average/Poor	Age	If no longer living, Cause of Death & Age at Death
Father				
Mother				
Brothers				
Sisters				
-				
- Relevant?				

**HAS ANY FAMILY MEMBER (parent, sibling, or grandparent) EVER HAD:**

YES NO Relationship

YES NO Relationship

Tuberculosis				Asthma			
Drug/Alcohol Abuse				Thyroid Disease			
Diabetes				Seizure Disorder			
Kidney Disease				Blood Disorder			
Heart Disease				Cancer			
High Blood Pressure				Stroke			
Arthritis				Obesity			
Stomach Disease				Other			
High Cholesterol							

OTHER CONCERNS/INFORMATION:

Should we or should we not require COVID-19 vaccinations/boosters?

HIV testing is required by all applicants. The results of HIV testing are to be handed in by the applicant with this report. Testing can be done by the applicant's physician or at a local health clinic.

HIV TEST RESULTS INCLUDED YES \_\_\_\_\_ NO \_\_\_\_\_

Candidate Signature

Date



**Td (tetanus/diphtheria) or Tdap (tetanus/diphtheria/pertussis),  
Domestic Students**

Must be within ten years of the first day of the first semester.    \_\_\_\_/\_\_\_\_/\_\_\_\_  
month/day/year

**International students**

Must have a series of three tetanus shots. One shot must be within 10 years.

\_\_\_\_/\_\_\_\_/\_\_\_\_    \_\_\_\_/\_\_\_\_/\_\_\_\_    \_\_\_\_/\_\_\_\_/\_\_\_\_  
month/day/year    month/day/year    month/day/year

**International Students Only**

Tuberculosis skin testing is mandatory and must be done in the United States. If you have been treated for Tuberculosis please bring your English translated medical records. If you were diagnosed with a positive reaction to tuberculosis documentation is required.

**Request For Additional Information**

**The following are not required but are recommended:**

**Hepatitis B** vaccine is highly recommended.    #1 \_\_\_\_/\_\_\_\_/\_\_\_\_    #2 \_\_\_\_/\_\_\_\_/\_\_\_\_  
If you have had this series, please fill in dates:    #3 \_\_\_\_/\_\_\_\_/\_\_\_\_

**Varivax** (varicella vaccine) is also highly recommended if you have not had chickenpox.     had disease OR vaccine:  
#1 \_\_\_\_/\_\_\_\_/\_\_\_\_    #2 \_\_\_\_/\_\_\_\_/\_\_\_\_

**Meningitis/meningococcal** disease    Menactra vaccine \_\_\_\_/\_\_\_\_/\_\_\_\_

Meningococcal meningitis is an infection of the brain and its covering layers. It may cause death or permanent disability. College freshmen, especially those who live in residence halls, are at modestly increased risk for this infection. This form of meningitis is passed from person to person by close contact. There is an immunization available that affords substantial protection against this disease.

**Health Care Provider's Signature (MD, DO, RN) verifying above information  
Or signed records attached verifying information.**

Name(print) \_\_\_\_\_ Signature/Title \_\_\_\_\_ Date \_\_\_\_\_

Should we have a medical professional look over this list and see if it is currently pertinent?  
Should we ask about height/weight?



## FORM J

### Pre-Novitiate Peer Evaluation and Self Evaluation

Submitted by: \_\_\_\_\_

Name of Student Being Evaluated: \_\_\_\_\_

Date: \_\_\_\_\_ Have you talked to him about this evaluation? \_\_\_\_ Yes \_\_\_\_ No

Our Formation Program requires that a man who wishes to enter the Novitiate should be ready spiritually, psychologically and intellectually. Please evaluate your brother in each of these areas. Consider your brother prayerfully and respectfully, and then write down your responses to these questions. Discuss your evaluation with him, while he discusses his evaluation of you. After you have met with all your brothers, then prepare an evaluation of yourself, based on what you heard.

#### **Spiritual Formation**

What signs do you see that show he spends time in prayer besides regular prayers in the chapel?

What signs do you see that show he really wants to be a religious?

What signs do you see that show he would be a good Carmelite?

#### **Psychological Formation**

In what ways does he share his time and talents with the community?

In what ways does he show he cares about the community and himself?

How does he make friends both inside and outside the house?

How does he accept people from other cultures?

How would you describe the way he does his house chores, and the way he takes care of himself?

How does he accept it when others talk to him about things that need to be corrected?

#### **Intellectual Formation**

What signs do you see that show he is attentive in his classes at school?

What signs do you see that show he is willing to change?

**FORM K**

**Novitiate Peer Evaluation Form**

**PEER EVALUATION**

Name of Novice Being Evaluated: \_\_\_\_\_

Submitted by: \_\_\_\_\_ Date: \_\_\_\_\_

*Consider your brother prayerfully and respectfully and then write your response to the following questions. Share your written evaluation with him in person, discuss it with him, and then ask him to sign it. Turn this signed evaluation into both novice directors by September 1<sup>st</sup>.*

1. What signs do you see that show he is committed to prayer?
2. What signs do you see that show he really wants to be a Carmelite?
3. How do you see him showing a commitment to our Carmelite way of life?
4. In what ways does he show that he is an active member of the community? How does he contribute to the life of the community?
5. How would you describe your relationship with him?
6. Where would you like him to grow or change in the future?
7. Any other observations?

Signed: \_\_\_\_\_

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

**BRANDSMA PRIORY**

**NOVITIATE SELF-EVALUATION**

*Please give prayerful reflection to the following questions for your 3-month self-evaluation, write your responses, and turn into both novice directors. Be sure to put your name and date on the top of each page. Please complete it by Wednesday, September 1<sup>st</sup>.*

I Personal Questions:

1. How would you describe your attentiveness at prayer? Rare? Occasional? Moderate? Steady? Restless? Restive?
2. How would you describe your level of vulnerability in prayer?

II Community Questions

1. How would you describe your level of openness?
2. How would you describe your level of communication?
3. How would you describe your level of transparency?
4. How would you describe your level of self-disclosure?
5. In what ways do you contribute to the life of the community that builds fraternal relationships. Be specific by giving examples.

III Other

1. Do you see the value of being alone? In what ways?
2. Do you spend time in your room without the noise of radio or electronic devices?
3. How have you grown in self-knowledge during the last three months?
4. What has been most difficult for you in novitiate so far?
5. How does your quiet time help your community life?

#### IV Carmelite Life

1. In what ways are you showing an interest in the traditions of our Carmelite life?
2. What signs do you see that show you really want to be a Carmelite?
3. In receiving feedback from your peers, what do you agree with? What concerns you?
4. Where do you think you need to grow or change more in the future as a person and as a Carmelite?

(Signed) \_\_\_\_\_  
Date \_\_\_\_\_

**FORM L**

**Learning Contract for Internship**

Intern \_\_\_\_\_ Date \_\_\_\_\_

Placement \_\_\_\_\_

Supervisor \_\_\_\_\_

Learning Goals:

as an individual

---

---

---

---

in Carmelite community

---

---

---

---

in ministry

---

---

---

---

Specific Responsibilities and Activities

in community

day of week

time

---

---

in ministry

day of week

time

---

---

self (prayer, recreation, etc.)

day of week

time

---

---

---

Name of Spiritual Director

---

Supervisory Session

(day)

(time)

---

Date Internship begins

---

Date Internship ends

---

These arrangements and agreements are accepted by:

\_\_\_\_\_  
Intern

\_\_\_\_\_  
Supervisor

\_\_\_\_\_  
Intern Director

\_\_\_\_\_  
Principal/Pastor/Other

## **FORM M**

### **Evaluation for Carmelite Internship**

The supervisor and intern will each write an annual evaluation. These evaluations will be subjective documents addressing the following items:

1. Goals and responsibilities as expressed in the internship contract.
2. Relationship to the Carmelite community as a group.
3. Relationship to individual members of the Carmelite community.
4. Relationship to the supervisor.
5. Relationship to people in ministry.
6. Relationship to ministerial staff.
7. Evaluation of placement as a personal, communal and pastoral learning situation.
8. Final summary
9. Future goals and plans

The supervisor and the intern will submit their evaluations to one another for discussion and signing. The evaluations are then sent to the Intern Director.

### **Guidelines for Community Evaluation for Carmelite Internship**

Members of the Carmelite community will evaluate the Carmelite intern. The supervisor is responsible for convening this meeting and compiling a summary of this which is sent to the intern director. The following can serve as a guideline for this evaluation:

#### **A. Personal Development**

- How does the intern interact with others?
- Does he seem at ease with himself and others with him?
- Is he able to be flexible?
- Does he seem to have a reasonable evenness of mood?

## B. Community

- Does the intern seem to understand the necessity as community member to take time to deepen the bonds of friendship and love, not just for the sake of ministry but for the sake of life?
- In what ways does he contribute positively to the growth of the community: for example, participating in house meetings, attending and helping to prepare communal prayer, assuming his share of household duties, using gifts and talents for the group?
- How does he show an interest in and a positive attitude toward the Province and the Order?
- How does he respond to the decisions and directives on the local, Provincial and Order level?

## C. Ministry

- Does the intern appear to be faithful to his responsibilities in ministry?
- Do you sense a balance between leisure and work?

## D. Spiritual Development

- Does it seem that the intern takes initiative in pursuing his own spiritual development?

## E. Commitment

- Would there be anything that would concern you in terms of this intern's being able to continue to commit himself to the vows of poverty, chastity and obedience?

## F. Conclusion

- Would you choose to live with this intern again? Why / why not?
- Is there anything that concerns you about this intern's future with our Province?
- Do you believe that he should be encouraged and supported to move from the internship to the next stage of formation?



## FORM N

### Self-evaluation for Profession of Solemn Vows

Name:

---

Please type your evaluation on a separate sheet and return to your one-to-one formation director by:

---

Evaluate yourself in terms of the following areas:

Emotional maturity and development:

Faith commitment / Spiritual development:

Carmelite Identity:

Charisms and gifts:

Areas of needed / desired growth:

Ways the community can assist you:

What motivates you to make your profession of solemn vows in the Carmelite Order?

**FORM O**

**Peer Evaluation for Solemn Vows**

\_\_\_\_\_ has expressed his desire to petition for solemn profession. You are being asked to assist the local community's formal evaluation as he, the community and the Formation Team discern his readiness for final profession. After completing this evaluation (please type your responses on a separate sheet) submit it and discuss it with the candidate. Please return this evaluation to his one-to-one director, \_\_\_\_\_, on or before \_\_\_\_\_.

Please evaluate him in the following areas:

Emotional maturity and development

Spiritual/Faith development

Participation in community life

Carmelite Identity

Strengths/charisms/gifts he brings to the community and to the church

Areas of needed growth

Any concerns about his making solemn vows

How can the community assist/challenge him as a member of the order?

Evaluation discussed on \_\_\_\_\_

\_\_\_\_\_

Peer Evaluator

Candidate

**FORM P**  
**Evaluation for the Diaconate**

Evaluation submitted by: \_\_\_\_\_

of (name of candidate for orders): \_\_\_\_\_

Please evaluate the individual in terms of how you see his readiness for the responsibility of Orders. Specify ways you perceive him as ready for the responsibilities of Orders. How do you see him as a minister? In what ways can he become a more effective minister? What gifts does he bring to Orders?

(Please type your evaluation on a separate sheet.)