



Formation Handbook

MISSIONARY SERVANTS OF THE MOST HOLY TRINITY

Vocation Development Committee | 2018

Formation Handbook

Missionary Servants of the Most Holy Trinity

Do give this much thought, do hold yourselves responsible for the future of the Cenacle; do remember that as you are, so others will be. F. Judge

A foremost responsibility of the General Custodian and his Council is that of promoting vocations and care for the formation of future members of the Congregation. This responsibility is extended to the Vocation Development Committee (VDC) which functions as an administrative exercise of the General Custodian and his Council. The membership of the VDC consists of the VDC Director and the Directors of Vocation Promotion and each stage of initial formation. It is the responsibility of the VDC Director that there be a clarity of communication between the General Custodian and his Council and the Directors. This clarity of communication permits the implementation of the direction given by the General Custodian and his Council and the implementation of this handbook. The Formation Handbook consists of two essential parts: The first is the handbook itself. The handbook presents structures, goals and process of the Formation Program. The second part of the handbook may be considered the heart of the Formation Program. This is the curriculum for the specific formation of Missionary Servants of the Most Holy Trinity.

The Curriculum represents an important step in the evolution of our Formation Program as it seeks to respond to the reality of our Congregation as an international and multicultural entity. We do not diminish the guidelines provided by the Church in terms of formation requirements and we do not diminish what is offered by the schools where our students attend. However, we find ourselves at a crucial juncture in church history and even more so in the history of Religious Life, specifically, the life of Missionary Servants. It is not viable that the formation of Missionary Servants be limited to essentially clerical and diocesan formation. As Missionary Servants we consecrate ourselves *in service to God the Father, the Son and the Holy Spirit RL. 22*. This consecration calls us to prophetic lives nurtured by the quality of our fraternity, life and service among the poor and abandoned and promotion of the ideal that every Catholic be an apostle. Fidelity to the Curriculum will allow us to draw closer to a formation that is much more coherent with the life that we profess as religious, Missionary Servants of the Most Holy Trinity.

It is important to recognize that there is only one Formation Program into which the stages of Vocation Promotion, Pre-Novitiate, Novitiate and Post Novitiate are integrated. The well-functioning of the Formation Program depends directly on the quality of this integration. There is no stage that is independent of the rest; each stage has an interdependent relationship with the others, even at the international level. This cannot be lost from view: each stage has its specific task, an “integrating element” and “spiral” interdependence among all stages.¹

¹ The five areas of formation (human development, community, spiritual life, apostolate and academic) are attended to at each stage, but in a stepwise fashion. The result is interdependence between stages and a spiral model of formation.

In 2002 the Church was called to conversion as the events of sexual abuse unfolded. The Missionary Servants of the Most Holy Trinity responded to this call with a more pronounced commitment in favor of the protection of minors and other vulnerable persons. Concretely, we gave continuity to the thrust of Vatican II and renewal chapters that called for a formation program that integrated the social sciences, especially psychology. Furthermore, the Congregation took the necessary steps to be accredited by Praesidium. This agency has established clear standards that require compliance in order to be accredited as safe and secure for minors and vulnerable persons². It is very important to note that even though these requisites became a legal requirement only in the United States, the General Custodian and his Council decreed that they be applied throughout the entire Congregation. Details of these requisites have been integrated into the Handbook. Note, for example, the requirement to review in a deliberate way, the sex policy with each student.³

In the implementation of the Handbook, the Curriculum, policies and direction given by the General Custodian and his Council, the VDC Director will promote at each stage methods proper of the Cenacle such as: Taking counsel, collaboration in ministry, team development, participation of the Missionary Cenacle Family (MCF), participation of the laity and attentiveness to Church norms. It is also the responsibility of the VDC Director to make sure that each stage of formation has the resources necessary to fulfill its task. This includes the functions of planning, supervision and evaluation at each stage of formation as well as the entire formation program. At the same time, each director has his own set of tasks corresponding to the stage of formation under his care. The description of the director's profile and role is found in the corresponding chapters of each stage. It is important to underline the importance of working with a team, the support of consultants and of ongoing formation. *Fidelity to our vocation demands that we continue our spiritual, apostolic, academic, personal and social development, within our common goals and mission. R 43.*

I. NATURE AND PURPOSE OF EACH STAGE

The Formation Program of the Missionary Servants of the Most Holy Trinity invites, introduces, initiates and integrates a young person into religious life in the context of the Missionary Cenacle Family. As Missionary Servant religious, we strive to be dynamic participants in the present moment in history, and in accord with the Lord's will, we want to respond to each challenge with the entirety of our lives (RL 3). Our Rule of Life states: *We meet the pressing needs of our day by undertaking works that the Church wants, that are good and necessary, and that have a note of abandonment* (RL 4).

Within the present historical moment, in society and Church, we recognize certain elements that are essential to our identity:

² See Appendix VI, Standards of Accreditation

³ See Appendix V, Required Documents, VII Sex Abuse policy and VIII Internet Policy.

Our vocation and identity are those of a religious, of men of faith that have left everything to follow Jesus for the sake of the Reign of God. We are identified by this radical discipleship and the fraternal community that is established because of this discipleship. It is from this one vocation that two expressions blossom: Brother and priest. The stages of vocation promotion and formation invite, give support, sustain and form from this perspective. We share only one vocation, that of a Missionary Servant, and we give expression to this vocation as a Brother or as a priest.

Our identity is mission. That is, *the preservation of the faith in those areas and among those people who are spiritually neglected and abandoned, especially the poor. Our chief effort is to develop a missionary spirit in the laity with the goal that every Catholic be an apostle. (RL5).* We make note that the cultivation of an Apostolic zeal and spirit takes place especially in ministerial and mission activities, preferentially in a Missionary Servant setting.⁴

Our identity is shared with the Missionary Cenacle Family. With the other branches of the MCF we share a vocation, a charism and spirituality. It has to do with the heritage of our founder, Father Thomas Agustin Judge. It is essential, therefore, that each stage of formation make manifest, in a concrete way this shared identity.

In terms of our identity, we also recognize with gratitude our growth as an international and multicultural congregation. This identity reflects our membership and our mission field. We cultivate a spiritual and developmental maturity as well as the skills to carry out our mission in this international and multicultural reality. It is important to note the significant challenge that our students face as they transition from their culture of birth to another site, at times radically different, to participate in the formation program of the Missionary Servants.

II. OBJECTIVES OF EACH STAGE

The missionary thought, the missionary idea, the missionary spirit should be dominant in our Missionary Cenacles RL 4

What is fundamental in the formation of young persons who aspire religious life is the task of discernment, deepening of a Gospel faith, ongoing conversion in the following of Jesus and an ever-deepening appreciation of Father Judge and the legacy for mission that we have inherited. It is to be noted that formation takes place in the context of what we have inherited as well as the way the charism of the Congregation is renewed with each new member and our new mission fields as an international Congregation.

Missionary Servants are nourished by an apostolic spirituality; we are contemplatives in action in the exercise of a prophetic ministry. All aspects of formation point in the direction of these two

⁴ In mission assignments we take note of the Missionary Servant policy for residing in our Cenacles. Please see Appendix XXIII.

dimensions of our vocation: only a person of prayer can be a man with an apostolic life that burns with *the white heat of charity* (RL 22).

This apostolic spirit builds into the Missionary Servant a commitment to mission, in service to the poor and the abandoned, in those works and places that suffer from injustice. The presence of this apostolic spirit is an indication of a Missionary Servant vocation.

The stages of vocation promotion and formation do not exist independent of each other. It is essential that all stages of the Formation Program be integrated in a spiral fashion. Each stage contributes to the formation task in terms of the five areas of formation: Human development, spiritual, academic, apostolic and community life.

It is extremely important to emphasize that it has to do with a vocation to religious life that is expressed as a Brother or a priest. It is fundamental that the Formation Program attend, first to the roots, religious life as a Missionary Servant. Then in the ebb and flow of discerning the will of God, continue with the formation that may be specific to the Brother or the priest.

In a similar way, it is very important to make sure that formation takes place in the context of the Missionary Cenacle Family. The family idea is a fundamental element in our identity as Missionary Servants of the Most Holy Trinity.

A. VOCATION PROMOTION.

The objective at this stage in the Formation Program is to promote spaces of encounter where a young person may be able to discover his call to become a Missionary Servant of the Most Holy Trinity. By sharing this ministry with members of the Congregation, with the MCF and others, prospects will be identified, accompanied and after the necessary discernment will enter the Pre-Novitiate.

B. PRE-NOVITIATE.

The prenovitiate formally introduces the student to the areas of formation that will be a part of each stage in the Program: Human development, spiritual, academic, apostolic and community life. In an adult environment, clear expectations and responsibilities of a man in formation will be presented. The values of disciples of Christ, of members of the Catholic Church and of persons who are deliberately seeking the will of God in their lives are values that will be nurtured and cultivated. With the novitiate in mind, the Missionary Servant Curriculum will be followed; guidance, support and resources in all the areas of formation will be provided. As such, the integrating element in the pre-novitiate is human development for a religious vocation.

C. NOVITIATE.

The primary objective in the novitiate is the confirmation of a vocation to religious life as a Missionary Servant of the Most Holy Trinity (CL 646). In an adult and prayerful environment,

continuity is given to the process that began in the pre-novitiate, with attention given to the Missionary Servant Curriculum. The students are formally initiated into the Congregation and they transition from laity to religious. The integrating element in the novitiate is the spiritual dimension. As a man of faith and of prayer, discernment takes place under the direction of the Novitiate Director. This discernment has to do with a total gift of self in the following of Christ through the evangelical counsels in accordance with the Constitution of the Missionary Servants.

D. POST NOVITIATE.

This is the last stage in initial formation. During this stage of formation, the professed student brother receives diligent accompaniment that will strengthen his vocation as a religious and fan the fire of apostolic zeal. The development of pastoral skills for the mission field specific to a Brother or a priest is part of this formation. During this stage, the task of integration between what takes place in the classroom, what takes place in the apostolate and the maturing process of the vocation is very important.

In continuity with the Novitiate, with particular attention to the Missionary Servant curriculum, each of the areas of formation will be strengthened. At the same time, given the fact that this stage is proximate to full engagement in the apostolate, the development of pastoral skill is the integrating element. During this stage, especial attention will be given to community life in service of mission.

The discernment task in the post novitiate is an art that is cultivated, studied and exercised not only in service to one's vocation but also in service to mission. The discernment of God's will is particularly important in moments of transition signaled by the renewal of vows, reception of ministries and ordination. Furthermore, discernment is pastorally necessary in the apostolate, in the context of the MCF and in the exercise of leadership. We seek to be faithful servants in following of the Lord.

III. THE PROCESS

Formation in the Congregation is recognized as a responsibility that is both personal and communal. It is a lifelong process intimately related to the radical following of Christ, *until that day that we might find ourselves with him in the glory of the Father.* (RL 43).

Specifically, in the Formation Program, initial formation is a responsibility that each person makes his own. The Program and the directors will be a source of support in the discernment process and the development of a vocation that is born of the personal relationship between the individual and Our Lord. Nevertheless, it has to do with a vocation in the context of Missionary Servants, hence the Program and directors share in the responsibility. It has to do with a discipleship in which we all accompany one another in search of God's will.

The directors of each stage of formation are responsible for the process ensuring that the expectations of the Program and the needs of the man in formation are fulfilled. The entire formation process is holistic, and attentive to the cultural realities of the men in formation and the places of mission that they will be called to serve. At all stages, the formation process includes the Missionary Cenacle Family.

In the formation process the use of different strategies and tools for support and supervision is important. Objectivity is important in the discernment process as well as measurement in the areas of formation and the accurate transmission of this information from one stage of formation to another. Some of the tools used are: The Personal Development Plan⁵, reports from the apostolate, mission experience and letters of recommendation.

Attention to the five areas of formation, human development, community life, academic, spiritual and apostolic is the basis of the entire Formation Program. In Vocation Promotion, these five areas are essential in the evaluation of a prospect's capacity and disposition for entry into the pre-novitiate. In the subsequent stages of formation, specific areas will function as an integrating element. In the Prenovitiate, the integrating elements are Human Development and Community Life. In the Novitiate, the integrating elements are Spirituality and Community Life. In the Post novitiate, the integrating elements are the academic and apostolic.

In the formation process, the role of the apostolate and that of the MCF is considered extremely important.

The Cenacle spirit is an apostolic spirit which finds its perfection in zeal, the white heat of charity. We are to become perfect in the spirit and virtues of the Cenacle, to live and die simple, prudent, humble, charitable ... men ... of sacrifice, of patience, of self-denial whose lives are spent and consecrated to the service of God the Father, Son and Holy Spirit (RL 22).

The very fact that we are a missionary congregation insists on the importance of the apostolic exercise in each stage of formation. The experience of service in an apostolate that is explicitly Missionary Servant is an element that nurtures, integrates and fortifies all aspects in the formation stages. The apostolates provide an opportunity to incarnate the charism of the Congregation and to consecrate one's self to its mission. What can be anticipated in the men in formation is a certain impatience that reveals an authentic apostolic zeal and a clear option for service to the most in need in the most tangled portion of the Lord's vineyard. The apostolate is chosen in dialogue with the director of formation. As such, the apostolate is in service to the man in formation. This means that the mission site supervisor needs to be clear that the support that the man in formation can provide cannot be full time unless it's during a prolonged period of mission assignment. It follows as well, that the man in formation will develop the necessary discipline to balance the apostolate and other formation tasks.

⁵ See Appendix I, Personal Growth Plan

The Missionary Servant, a man of prayer and apostolic zeal, is a contemplative in action. The events of encounter in the apostolate are privileged periods of prayer and reflection. These periods are structured in each stage of formation as spaces for a deep sharing on the presence of the Lord, the manifestation of God's will and the response that is elicited from the man in formation. It is to be expected that members of the Missionary Cenacle Family will participate in these moments of formation.

In terms of the Missionary Cenacle Family, what the Rule of Life states is crucial:

We are to call forth apostolic men and women from everyday walks of life to become lay associates in the Missionary Cenacle Family. A family spirit should be demonstrated by loving regard among the members of the branches and, when feasible, by collaboration in apostolic works. It is our particular responsibility as religious members of this family to conserve this *Cenacle spirit and be the sanctuary where that fire is kept*. Father Judge declared that *if the right spirit is maintained, if the primitive spirit is passed down, this family idea will engender the most beautiful fruits for the honor and glory of God and for the edification of the Church*. RL 8.

From the very first movements of the Spirit that inspired the Founder, Thomas Augustine Judge, CM, the sense of family in the missionary task has been absolutely essential. The passage of time and the very signs of the times confirm that our sense of family for mission is a charismatic gift for the church and the world. It is imperative that the active presence of the MCF be an integral element in vocation promotion and each stage of formation. As such, a test of a Missionary Servant Vocation is the person's capacity and openness to share mission in collaboration with the MCF.

No stage in formation exists independent of the VDC. It is a clear expectation that each director will participate in the VDC process at the international and local levels. The VDC Director will be supportive and supervise this relationship.

The VDC Director and the General Custodian or his delegate will make sure that each director has the necessary resources and supervision. The drafting and execution of a mission plan by each director is required to be able to ensure the necessary resources and corresponding supervision⁶. The element of collaboration and shared ministry will need to be present in the plan. The elaboration of the plan itself needs to be a collaborative effort.

The mission plan is for a one-year period, it identifies clearly the geographical zone it represents, the processes that are taking place, the challenges that are identified and proposed steps towards the future. This plan is the basis for the budget and proposed subsidy from the Congregation. Attention is necessary given the diversity of circumstances that govern the budget.⁷ The VDC Director will need to provide any necessary counsel and support.

⁶ Please see Appendix XVIII, Mission Plan

⁷ e.g. The need to separate personal expenses from expenses dedicated to the apostolate; the need to integrate a budget with the cenacle budget; responsibility of reports to local civil authorities.

The mission plan and budget are presented to the General Council with the recommendation of the VDC Director. Two progress reports, at six-month intervals, are to be presented to the VDC Director. The second report will anticipate the following year's mission plan.

The VDC Director and the General Custodian or his delegate has the special responsibility of providing support to each director. Ongoing personal and professional training in the ministry is extremely important.

IV. REQUIREMENTS OF EACH STAGE OF FORMATION

The apostolic spirit is a rare spirit, a priceless spirit, a spirit high above that of those who are ordinarily devout. This is the life of those great, self-denying, sacrificing lovers of Jesus Christ who leave everything and dispose themselves to go anywhere. (RL 39)

Men who bear the Missionary Servant vocation have a certain profile: Ardent charity, apostolic zeal and a willingness to sacrifice are fundamental. These men fulfill their vocation to be servants among the poor and abandoned insisting in the preservation of the faith. These men desire to fulfill their life as missionaries in the context of the MCF, and attentive to collaboration, especially with the laity.

A responsibility of each director is to communicate clearly the Congregation's expectations to the man in formation. The five areas, human development, community, spirituality, academics and the apostolate are the basis of each evaluation, discernment and an indication of readiness to pass from one stage of formation to another. All the while, this responsibility is shared by all the members of the Vocations Development Committee. Communication between stages of formation in local session as well as the international sessions are very important. The importance of these sessions is on par with the prompt acquisition and transmission of the students file.⁸ Given the specific occurrence, what is also included in the file is the notification of separation from the program.⁹

REQUIREMENTS OF EACH STAGE

A. VOCATION PROMOTION.

To enter the stage of Vocation Promotion as a prospect, a degree of spiritual and human development is required. This level of maturity is manifested especially by way of a personal relationship with the Lord, a love of God in the context of Church and an apostolic spirit that is expressed in an apostolate. During this stage, ordinarily of at least one year's duration, the necessary requirements of canon law and of the Congregation are gathered (RV 40)¹⁰. Vocation

⁸ See Appendix V, Required Documentation.

⁹ See Appendix XIX, Separation from the Program.

¹⁰ The corresponding chapter will provide a list of the requirements and in the corresponding appendix II, the norms for retention of documents will be provided.

Promotion is especially attentive in communicating a clear call to religious life as a Missionary Servant of the Most Holy Trinity and how a Missionary Servant gives expression to his vocation as either a Brother or as a priest.

B. PRENOVITIATE.

With the recommendation of the Admissions Board, having fulfilled all the requirements for admission, the recommendation of the Vocations Director and the student file in the hands of the Prenovitiate Director¹¹, the prospect becomes a member of the prenovitiate. The prenovitiate stage adapts itself to the reality of each of the students¹². The prenovitiate is a cenacle designated by the Congregation where an adult environment, proper for disciples of the Lord, is cultivated. It is not properly a house for religious, but indeed a house where community life and discernment towards religious life takes place. The role of the Director and his formation team is to support, evaluate and discern the progress of the man in formation. Especial attention to the student's progress will be given in an annual evaluation and moments of transition. It is an expectation that the student will assume a personal responsibility for his vocation and thereby make his own the moral certitude that the grace of his vocation is present.

This stage of formation is divided into three consecutive phases that indicate a progressive movement in the discernment process towards the novitiate. It is anticipated that three years is ordinarily the time spent in the prenovitiate.

1. Aspirant: This is the phase of initiation and testing. It is a probationary period that typically lasts six months in residence at the prenovitiate formation house. The aspirant participates fully in community life and prenovitiate program.
2. Candidate: Transition phase. The prenovice, in dialogue with his spiritual director and the director of the prenovitiate, begins this second phase. In this phase, there is an awareness that the prenovice has the capacity to proceed with the discernment and development of a Missionary Servant vocation. As such, the candidate will manifest a growing personal responsibility in the five areas of formation.
3. Postulant: Integration phase. During this last phase, usually of six months to a year's duration, the postulant makes proximate preparation for admission into the novitiate. During this time the discernment process becomes more pronounced as his personal history is reviewed before the Lord. Indication of this more profound discernment is to be found in the quality of his prayer, life in community, apostolic zeal and a living out of the evangelical counsels that identify him clearly with the Congregation. During this phase, the Novitiate Director will interview the prenovice in anticipation of the next stage in formation, the novitiate.

¹¹ The Vocation Promotion prospect file is transmitted to the Prenovitiate. See Appendix: III, IV and V.

¹² Students come from different cultures and different degree of academic preparedness.

C. NOVITIATE.

It is the General Custodian with his Council that receives the petition for entry into the novitiate. The General Custodian and Council reviews the recommendation of the Prenovitiate Director, the recommendation of the VDC Director, the student file¹³ and then grants admittance or not into the novitiate. In the novitiate, the Director of Novices is the principal spiritual director of the novice. An important degree of transparency is expected of the novice before the novice director. One on one interviews between the director and the novice will take place at regular intervals and two formal evaluations based of the five areas of formation. These formal evaluations are **presented to** the General Custodian. The first evaluation takes place at the novitiate midpoint and the second will accompany the recommendation for profession of vows. The Director of the Novitiate will find support in the discernment and recommendation of novices in his formation team.

D. POSTNOVITIATE. With the first profession of vows, the Student Brother now begins the Postnovitiate stage. The men, once professed, step into a space where they are not simply in a formation program, they are now under vows, and obedience to the General Custodian. Though under the direction of the Director of Professed, the authority of the General Custodian is not diminished.

During this stage of formation, emphasis will be placed on a more deliberate growth of the professed as either a Brother or a priest. It is in accordance with the needs of the Congregation and the gifts of the professed that the spiritual, apostolic and academic programs are established. It is very important that the Student Brother recognize that a larger portion of responsibility belongs to him in this last stage of initial formation. The new reality is that of a person who has made a donation of himself in liberty by way of the evangelical counsels to a life as a religious, a Missionary Servant of the Most Holy Trinity. Evaluations will especially note the personal appropriation of Cenacle spirituality, the maturity of his living out of the evangelical counsels, his emotional maturity, apostolic zeal and his ministerial ability

Special attention will be given to the moments of transition, renewal of vows, final profession, extended mission assignments, installation of ministries and according to case, ordination to the diaconate and priesthood as well as first assignments. Participants in the discernment process include the General Custodian, the VDC Director, the Post Novitiate Director and the formation team¹⁴. It is important that the Director of the Professed communicates with the General Custodian when it comes to the above listed areas. An indication of a time line is important. The director of the VDC will be informed of the process that is taking place and will offer counsel as needed.

V. RITES OF TRANSITION

Christ calls us to follow him with liberty of spirit and to share in his emptying of self for others (Phil 2:7). He was celibate and poor (Mt. 8:20; Lk9:58) and obedient until death (phil2:8). We freely vow chastity, poverty, and obedience as

¹³ To the file transmitted by Vocation Promotion, prenovitiate data is now included.

¹⁴ The pre-novitiate folder once reviewed by the General Custodian is transmitted to the Post Novitiate. At the end of the Post Novitiate, with relevant additions, is transmitted to the Generalate archives.

a personal response in faith to God whose love the Holy Spirit has poured out in our hearts (Rom 5:5) RL 23

Appropriate rites of transition are celebrated within each of the stages of the Formation Program. Each ritual action needs to be significant enough to transmit the meaning of the celebration with elegance and simplicity.

It is a moment of thanksgiving because it has been God who has sown the seeds and brought the seed to fruitfulness in the context of the paschal mystery. Each transition insists in letting go of self and become more of Christ and his mission.

We celebrate the transition of each person from one stage to another. In doing so, it is not just the individual that is engaged in the transition but the entire Congregation as it renews itself with each new member. At the same time, we recognize with gratitude the ministry of each formation director and the trust that the Congregation has bestowed upon him. The quality of the relationship between the directors, especially respect for each other's ministry, is of great significance.

The rites of transition make way for the celebration of Final Vows as a personal response to the Lord in service to God's people; vows received by the Congregation. A celebration, in the intimacy of the Congregation and the Missionary Cenacle Family, becomes a commitment of loving service by the Church to those most in need.

We emphasize that the rites that are celebrated cannot be reduced to social acts or confused in such a way that the religious life of Missionary Servants of the Most Holy Trinity is lost in the midst of strands of local cultural expressions popular culture. A clear perspective and sound balance are essential. The importance of one's family is not diminished, nor the need to leave family behind to become part of a missionary family. The elegance of ritual is not diminished, nor will the vow of poverty be diminished with excessive expenses. Priesthood ordination is not diminished when we insist on the preeminence of Final Vows.¹⁵

¹⁵ Please review Appendix XVII, norms on the occasion of vows and ordination.

CHAPTER 1

VOCATION PROMOTION

The Vocation Promotion Director, in his task of promoting vocations and creating spaces where young persons may be able to discover their vocation to become a Missionary Servant, will have very much in mind the following profile. The person needs to have at least the capacity for:

- + A personal relationship with God that is nurtured by Cenacle spirituality.
- + A practical love for the charism.
- + A clear sense of belonging to our community and religious family.
- + An emotional maturity that at least corresponds to his chronological age. This maturity is characterized by a degree of personal integration, openness and freedom that makes him capable of making an option for vowed life.
- + An apostolic zeal that moves him towards the most poor and abandoned, the preservation of the faith and a missionary labor that is characterized by collaboration and a sharing in the mission with the branches of the MCF.

From the onset, the Vocation Promotion Director recognizes that this ministry can only be carried out with the awareness that it is an apostolate that belongs to the entire Church, and in a specific way to all Missionary Servants and all the branches of the MCF. To call forth others to share in this apostolate is a priority.

By sharing this ministry with members of the Congregation, with members of the MCF and others, prospects will be identified, will be accompanied and the discernment necessary will take place to bring them to the Prenovitiate.

In general terms, the signs that give indication that the person may be able to respond to the student profile are as follows:

1. In terms of human development, the person is single, between the ages of 18 and 35 years of age, in good physical and mental health, free of non-educational debt and obligations to family.
2. In terms of community, the person gives indication of being capable of living with and sharing mission with a variety of persons.
3. In the area of spirituality, the person is fully initiated in the Church¹⁶, manifests good moral character, cultivates a personal relationship with Our Lord, manifests apostolic zeal and has the willingness and capacity for celibate life.
4. In the area of academics, the person has a proven ability for study based on his academic record.
5. In the area of the apostolate, the person manifests apostolic zeal and a disposition to leave all for the love of God and neighbor, especially to serve among the poorest and the abandoned.

¹⁶ Church documents to be presented, Baptismal and Confirmation certificates (Can 645, n 1).

SPECIFIC CONSIDERATIONS

1. Questions and exceptions. Given the fact that it is Our Lord who makes the vocational call, the discernment task is of gave importance at each stage in the Formation Program. This means that it is entirely possible that given circumstances may raise questions and the possibility of exceptions. The VDC Director will be the first instance in attending to questions and the consideration of exceptions.
2. 35 years of age is the age limit for applicants, anyone older will be considered an exceptional case.¹⁷ What is meant by exceptional is that the prospect has a superior preparedness in the five areas of formation and this recommend the person for entry into the Formation Program. Special attention is given to emotional maturity, capacity for community life and the apostolates of the Congregation. The responsibility to make manifest the exceptional qualities that recommend the prospect, rests upon the prospect himself. The discernment process will be much more intense and for a longer period. Besides a psychological evaluation that is much more focused on the older individual, counsel will also be sought from members of the Congregation who have firsthand experience of the individual. In the consideration of each case, we will also be attentive to the fact that the Formation Program may not have the capacity to receive a given individual¹⁸.
3. Good moral character. Letters of recommendation are required that offer witness of good moral character and a spirituality that makes manifest a love of God and neighbor. Ordinarily letters of recommendation are expected from the parish pastor, from individuals in his profession and from family and friends. The requirement is of three personal recommendations (at least one from a member of his family) and two professional recommendations for a total of five letters. For exceptional circumstances, the letters will need to offer more detail recommendation.
4. Good physical and mental health. Psychological¹⁹, physical, eye and dental exams are required. These reports are necessary to be able to give indication that the prospect will be able to fulfill the expectations of the Formation Program and in the future the rigors of Congregational apostolates. An HIV exam is a requirement. At present, persons who test positive for HIV are not eligible for admission into the Program.
5. A person who has a credible accusation of sex abuse of a minor, or who has acquired or deliberately viewed pornography of minors, cannot be admitted into the program. A review of publicly accessible content on all social media, personal blog sites, and web sites associated with accounts controlled by the prospect will take place prior to admission into the pre-novitiate²⁰.
6. Academic aptitude. Academic aptitude is considered with the clear understanding that on its own will not determine admission into the Formation Program. The circumstances that each of the prospects represent will need to be taken into consideration, not only in terms of the country

¹⁷ This is also the case with prospects from outside of the American continent.

¹⁸ The Formation Program, because of its own deficits, may not have the preparedness to respond to persons from given cultures or with specific physical limitations.

¹⁹ Please see appendix XXII

²⁰ Please see appendix VIII, Format, Evaluation of Internet and Social Network Use.

of origin, but also in terms of the circumstances within the country²¹. It is also very important to be attentive, to the degree possible, if it has to do with a Missionary Brother or a priesthood candidate. It is important to recognize and be attentive to the requirement of apostilled documents in the transition from one country to another.

- a) In the United States, a high school diploma is required, though due consideration will be given to individual circumstances.
- b) In Mexico, a *preparatoria* is required, though due consideration will be given to individual circumstances.
- c) In Central America and the Caribbean, ordinarily a *bachillerato* certificate is required, though due consideration will be given to individual circumstances.
- d) In Colombia, ordinarily a *bachillerato* certificate and having passed the national exam (ICFES) is required. Due consideration will be given to individual circumstances.

7. Freedom of debt is required. The discernment of a vocation takes place in the context of freedom which the presence of debts may limit severely. The Congregation is not responsible for these obligations. An area that may lend itself to consideration has to do with student loans. Due consideration will be given to this area by the VDC Director²².

8. Freedom from obligation to family. Attention is necessary when considering the responsibilities that a prospect may have in the care for his family that limit his ability to engage in the Formation Program and his future availability for mission.

9. In those cases where the prospect has a prior seminary or Religious history, the norms established by Cannon Law will be followed (Can. 645:2.3).

10. Religious in final vows, Priests and deacons that seek admission into the Congregation will be presented with a formation program specifically tailored to their formation level²³ without limiting the norms established by Cannon Law (Can. 265-272) and Congregational norms²⁴. Such individual will be required to adhere to Missionary Servant norms of support and accountability.

11. Converts²⁵ that seek admission into the Formation Program will need special attention to the discernment process. Ordinarily, converts will not be considered for admission until they have had ample time to mature in their lives as Catholics, usually a minimum of a year.

12. Persons who have mental illness may apply for entry into the Program, but they require special attention to their discernment process and the recommendation of the psychological consultant. Ordinarily it has to do with an individual who has been able to live a healthy life for at least a period of two years.

²¹ Economic circumstances might have impeded academic preparedness.

²² There are precedents. The Congregation assumes portion by portion of the debt until Final Vows. Ex

²³ A person is not considered fully initiated into the Congregation until Final Vows.

²⁴ Please see Appendix XX for process (January 2016).

²⁵ Persons who have recently been initiated into the Church or persons who have recently returned to the sacramental life of the Church.

13. Persons with an addiction history such as alcoholism and drugs may apply for entry into the Program, ordinarily after two years of being clean and sober. Special attention to the discernment process and the counsel of experts in the field are necessary.

14. Ex-military personnel may be considered for admission into the Formation Program, ordinarily after one year after honorable discharge. Special attention is necessary especially if the person found himself in zones of conflict in service to his country.

15. Ex-offenders will be considered for admission into the Formation Program, ordinarily after two years since their incarceration. Careful attention is necessary to the discernment process and the recommendation of consultants in this area. It is important to note that a penal record typically becomes an obstacle that impedes the crossing of national borders.

16. Persons who have had a marital relationship will be considered for admission into the Program of Formation, according to case²⁶.

17. Persons who seek admission into the Formation Program will present the results of criminal background checks to the degree possible in terms of country of origin. This background check is in keeping with the requirements of vocational discernment, legal and the Congregation's commitment to be a safe and sound place for minors and the Congregation's responsibility before agencies such as Presidium.

18. After having fulfilled all the requirements to petition admission into the Formation Program, the formal petition is presented before the corresponding Board of Admissions. Ordinarily, the members of this board are: Vocations Director, Prenovitiate Director, VDC Director and the psychological consultant. The person responsible for directing the process of admission into the Formation Program will be the Vocations Director in the country where first contact was made. The full file, with all related recommendations is transmitted to the Prenovitiate Director of the country that will be receiving the prospect.

19. Regarding the case of English-speaking persons from outside of the American continent. These persons will be referred to the Vocations Director of the United States or his delegate. It is important to note that the process that has been established considers these prospects under the category of an exceptional case as noted above. The process also does not contemplate offering an entry visa into the United States upon initial contact or petition. **Furthermore, given the reality that psychological testing has cultural limitations, other methods of evaluation will be employed.** Further, an evaluation of the person's ability to adapt to the cultural requirements of ministry in the United States²⁷ will also be made.

²⁶ e.g. Married in or outside of the Church, widowed, family responsibilities.

²⁷ See the *USCCB Guidelines for Receiving Pastoral Ministers in the U.S. Third Edition*. See also *Appendix XXIV, Guidelines for prospects from outside the American continent*.

20. The Congregation's as well as the VDC retention of documents policy²⁸ is to be followed with due diligence. There will be complete safeguard of the privacy of all petitioners and members of the Congregation.

VOCATION PROMOTION RESOURCES

1. Operations Manual for Vocation Promotion. This manual, with significant detail, gives a description of all the areas that receive attention from the Director of Vocations in order to fulfill his ministry. These areas include the development and distribution of printed and digital materials, development of vocation promotion teams, identification and accompaniment of prospects, listing of office personnel and their responsibilities. The Operations Manual is written by the Vocation Director and his team, under the supervision of the VDC Director.
2. The Missionary Servant Curriculum.
3. Missionary Cenacle Family.
4. Workshops, retreats and youth conferences.
5. Letters, phone calls, vocation promotion visits.
6. Newsletters, newspapers, vocation promotion magazines.
7. Psychological consultation.
8. Vocation promotion teams.
9. Mission and apostolate sites.
10. VDC.

INFORMATION AND DOCUMENTS FROM PROSPECTS

A way of organizing the vocation promotion process is in terms of three stages. The stages do not simply represent chronological periods since they have to do with a discernment process that goes hand in hand with the fulfilment of the expectations of the Formation Handbook and the Curriculum. It is understood that the process with the young person will last at least one year, for some a longer period will be necessary.

Stage 1. Initial contact. This has to do with a person that has an initial interest in becoming a Missionary Servant. This person will not be presented with a questionnaire that is overly detailed,

²⁸ See retention policy appendix II and granting of access to confidential documents, appendix XXI.

but a first step will be taken to gather enough information in order to begin the conversation and a discernment process.

Towards this end, in this first stage, the prospect will be sent the following:²⁹

- + Beginning of the discernment process questionnaire.
- + Instruction on the drafting of an autobiography.

The information that is gathered in this first stage opens the door to proceed with the different items that will need to be covered, the handbook, the curriculum (see, “extract of the formation handbook”), etc.

Stage II. Once the process of discernment has matured, then further information is gathered. A list of the documents that will be needed is sent to him as well as the format that will require his signature in order to have access to his confidential information.

- + A list of required documents.
- + Authorization for review of confidential documents.

Stage III. As the discernment process continues to mature, then the formal petition for entry into the prenovitiate is provided. This document will become part of the prospects file and will be transmitted to the Admissions Board.

- + This is a two-part petition. The first will gather information that may have already been provided but will more than likely need to be updated. The second part is the recommendation of the vocation director.
- + During this stage, the psychological exams will take place.
- + It is recommended that once the discernment process begins to mature, the information sheet (appendix IV) begins to be filled out. This information sheet will be updated in each formation stage and seeks to be a summary of the file contents.
- + It is recommended, that once the discernment process begins to mature, the format found in appendix V, Required Documentation, be attended to.

²⁹ See Appendix XXV

CHAPTER 2

PRENOVITIATE

As mentioned before, the Student Profile is the necessary point of reference in each stage of formation. This profile contains the following:

- + He has a personal relationship with God that is nurtured by Cenacle spirituality.
- + He has a practical love for the charism.
- + He has a clear sense of belonging to our community and religious family.
- + He has an emotional maturity that at least corresponds to his chronological age. This maturity is characterized by the degree of personal integration, openness and freedom that makes him capable of making an option for vowed life.
- + Has an apostolic zeal that moves him towards the poorest and abandoned, the preservation of the faith and a missionary labor that is characterized by collaboration and a sharing in the mission with the branches of the MCF.

In an adult environment, the values of followers of Jesus, members of the Church and of persons who are in search for the will of God are nurtured and cultivated. With the novitiate in mind, the Missionary Servant Curriculum is followed, the supports for human and spiritual development are presented, apostolate experiences are offered, the student is given guidance in terms of academic and formation expectations and responsibilities.

Formation Areas

Human Development. The integrating element in the prenovitiate is the human development necessary for a vocation to religious life. With the tools provided by the psychological studies, the counsel of the psychological consultant and the very context of one's personal history, specific areas of human development will call for attention. Personal history is one of those areas that takes on relevance. To gather one's personal history in its moments of joy and of sorrow is an important task. Part of one's personal history also includes psychosexual development and a positive self-acceptance. In the prenovitiate persons of different ages, cultures and quite distinct families of origin come together. As such, what is sought is not uniformity, that everyone be identical or that everyone strives to arrive at some ideal of perfection. What is to be sought is an openness to growth and integration. This, in turn, contributes to the capacity to make decisions in freedom and make of one's life's project an exercise of personal responsibility. And, human development has some visible signs: Self-acceptance, intimacy in interpersonal relationships, healthy relationships with persons in authority, feels at home in terms of his own sexual orientation, can enter into relationship with ease with persons of diverse cultures, diverse ages, men and women and individuals with different sexual orientation.

Community. The construction of Religious Life is based on love of God and neighbor³⁰. For us, our neighbor is our brother in community. Community life is of the essence of what it means to be a Missionary Servant of the Most Holy Trinity. This is the manner of the Trinity and the manner of the missionary. It is from the experience and context of community for mission that the self-gift to the world takes place and it is the place to which the missionary returns to. Our very legacy of a “*family spirit*”, so cherished by Father Thomas Augustine Judge, CM, insists on the importance of constructing and belonging to a prophetic community, for mission³¹.

Spirituality. The novice receives instruction and is introduced to Cenacle spirituality, by its very nature, an apostolic spirituality. Community life is the context for a personal relationship with the Lord where a devotional knowledge is nurtured in terms of the mysteries of the Trinity, the Holy Spirit and the Incarnation. It is important to note, that the spirituality that the student brings with him into the Program must be respected. It is gathered and placed in dialogue with Missionary Servant spirituality such that a certain mutuality takes place. In the personal, what is Missionary Servant is discovered as well as the Missionary Servant in the personal.

This spirituality is nurtured by prayer, the Eucharist, the apostolate and the constant search for and the doing of the will of God. Time for these moments of grace will be provided in the house schedule. Furthermore, the necessary support of instruction, access to spiritual direction and the sacrament of reconciliation will be made available³².

Academic. The context of mission in service to the poor and abandoned and the formation of apostles requires a solid academic foundation in accord with the discernment of a vocation to Religious Life as a Missionary Brother or a priest. As such, the academic plan proposed by a school will not be the determining factor in the Formation Program; the academic is in service to the Formation Program and not otherwise. Besides the important consideration of the vocational discernment, a good example of the academics in service to formation is language studies. Our own disposition to serve in those places where the Congregation sends us insists in the study of languages and the acquisition of a capacity to live the Gospel in one culture or another. In the present moment in the history of the Congregation, it is particularly relevant that English and Spanish be studied.

Apostolic. Apostolic zeal is of the very nature of a Missionary Servant vocation. If there is no apostolic zeal, there is no Missionary Servant vocation. In the Novitiate this apostolic zeal is given guidance, direction and a site for its proper exercise in parochial and non-parochial settings proper of the Congregation. These experiences will provide an opportunity for prayer and reflection that will help clarify what is uniquely Missionary Servant and allow for a realistic motivation, a concrete prayer life and an apostolic effort that will not be confused by erroneous motivation, including assistencialism.

³⁰ See Luke 10:25-37

³¹ RL 8

³² The student will always be at liberty to choose a confessor; the student will receive support and guidance in the choosing of a spiritual director.

Structure of the Prenovitiate

The prenovitiate is divided into three phases: Aspirant, Candidate and Postulant. The transition from one phase to another is not automatic or chronological. Each transition has to do with a discernment process where increasing evidence of discipleship and a call to formal initiation in the Congregation as a novice becomes clearer. It is important to note that the transition from one stage to another is a matter of the discernment of a vocation to religious life and not the acquisition of status or privilege. Ours is the discernment of a vocation that will lead us to a life of service.

- A. Aspirant. In the aspirancy phase, the student has the opportunity to live where the *ordinarily devout* is transformed into a steady path towards religious life as a Missionary Servant. Under the direction of the Director of the Prenovitiate, a corresponding portion of the Missionary Servant Curriculum will be attended to, individual interviews take place and the necessary supports are offered that will help confirm that the prenovitiate is the appropriate site for the aspirant's response to the vocational call that he has perceived.

It is a period of testing to see if this is the right place for the aspirant and to see if the needs of the aspirant and the Formation Program are a good match. The constant desire is that, with the guidance of the Holy Spirit, the aspirant will deepen his call to become a Missionary Servant in the Formation Program. However, it is possible that the Formation Program may not have the capacity to accompany the formation of an aspirant³³.

- B. Candidate. The aspirant phase transitions to the candidate phase after deliberate consideration. In this phase, the expectation is that the student manifests an increased degree of responsibility for studies and his formation process. Some of the indications that this is taking place is that "he is at home" with himself, with his peers, with persons in authority and with God, increased interest in the apostolate and a greater vocational clarity in terms of religious life and its expression as a Brother or priest.

What will be noticeable in the candidate is a joyful personal initiative regarding his responsibilities, a prayer life, participation in the liturgy, transparency in his coming and going in the cenacle, and his own willingness to allow himself to be known even as his own personal self-knowledge increases.

During this phase, another portion of the Missionary Servant Curriculum is attended to and specific support, as needed, for human development issues will be offered. During this period there will be an opportunity for a prolonged mission experience.

During this phase, attention will be given to elements proper of the Missionary Servants such as the Missionary Cenacle Family, Missionary Cenacle literature and the charism of the Congregation.

- C. Postulant. The Postulant phase can take place ordinarily after a year in the Prenovitiate. Postulant means immediate preparation for entry into the novitiate.

³³ E.g. It is possible that the Formation Program lack the language ability or understanding of culture that a given aspirant represents.

The postulant manifests in daily life a personal identification with religious life as a Missionary Servant. In other words, a simple life that indicates the living out of the Evangelical Counsels, a readiness for hospitality and service, and an obvious connection between his studies, enthusiasm for the apostolate and clarity in his vocational discernment. In all of this, he gives evidence of being well grounded and an emotional maturity that recommends him for the novitiate.

During this phase attention will be given to the next portion of the Missionary Servant curriculum. Besides this, a greater emphasis will be placed on the apostolate. In terms of the apostolate, a development of an increased capacity for critical reflection and empathy for the persons being served is to be expected.

Resources:

1. First, the primary resources are the members of the local VDC. The meetings take place at least once a month. They are a source of personal support for the director of formation, and it is a venue for counsel and feedback as well as mutual accountability. This is also an opportune place where the students can receive accompaniment across each stage of formation. And, lastly, the local VDC facilitates communication with the General Council with the formal participation of the VDC Director at least three times a year.
2. Another resource is the house team composed of consultants in the areas of academics, pastoral and psychological. With the house team the daily issues of formation become the agenda items.
3. The schools where our students receive academic formation are an important resource. Missionary Servants establish a formal relationship with the schools in order to make sure that the academics adequately fulfill the formation expectations of the Congregation. Each school is approved by the General Council.
4. Places for mission and apostolate are an important resource, especially when members of the MCF, also an important resource, are included.
5. Documents and the like that are specifically Missionary Servant.
6. Ongoing professional preparedness of the director of formation. This is an area of specific responsibility for the director of the VDC; the ongoing education of the directors.
7. Skills and strategies specific to this ministry such as interreligious gatherings, the Personal Growth Plan, etc.
8. The vocation promotion team in a mutual support relationship and collaboration with the formation program.

CHAPTER 3

THE NOVITIATE

Once the student has reached the Postulant stage, a relationship with the novitiate begins by way of the Director of Novices. This relationship grants the postulant information and a certain degree of preparation in anticipation of the novitiate. The director of novices, through this initial contact, will be able to anticipate the specifics necessary for the integration of the postulants into the novitiate.

The postulant, as he transitions into the novitiate, will have manifested increased emotional maturity and clarity in terms of his vocation. This is an example of the spiral nature of the Formation Program. Each stage in the Program does not begin at zero, the man in formation transitions with a degree of development in his formation and discernment from one stage to another. Each area of formation and the discernment process is given another level of attention at each subsequent stage. In other words, the Student Profile is becoming more and more a reality in the student:

- + He has a personal relationship with God that is nurtured by Cenacle spirituality.
- + He has a practical love for the charism.
- + He has a clear sense of belonging to our community and religious family.
- + He has an emotional maturity that at least corresponds to his chronological age. This maturity is characterized by the degree of personal integration, openness and freedom that makes him capable of making an option for vowed life.
- + Has an apostolic zeal that moves him towards the most poor and abandoned, the preservation of the faith and a missionary labor that is characterized by collaboration and a sharing in the mission with the branches of the MCF.

The environment in the novitiate is clearly that of religious life, Missionary Servant of the Most Holy Trinity. Specifically, the novitiate is attentive to a disposition that will allow a deepening of the relationship with the Lord as the novice searches for a confirmation of a vocation to religious life. The prevailing tonality in the novitiate will be of prayer, reflection and discernment. This is not a monastic structure of withdrawal and strict cloister. It is a desert experience that is clearly dedicated to that disposition for the relationship to take place and the novice be able to recognize before God that he has been called to the profession of the vows of poverty, chastity and obedience in accordance with the Constitution of the Missionary Servants. In the novitiate process, the Missionary Servant Curriculum will be treated as a priority.

In the novitiate, spirituality is the integrating element. All other areas of formation are integrated and flow from the area of spirituality. In the novitiate, the novice is invited to deepen his personal relationship with Our Lord by way of prolonged periods of prayer, instruction on the spiritual and sacramental life, material corresponding to the Missionary Servant curriculum for the novitiate and the guidance given by the Director of Novices.

The academic area in the novitiate is in service to the personal relationship to Our Lord that unfolds into discernment seeking to confirm the vocation of the novice as a Missionary Servant. This discernment is supported by the materials provided as related to prayer, the history and present reality of religious life, Fr. Thomas Agustin Judge and the Missionary Servants, mission and charism of the Congregation.

The apostolate in the novitiate is the crucible where the encounter between Our Lord and the novice takes place. What is brought to prayer and what is studied requires the reality of life. In the novitiate the apostolate attempts to place the novice in settings that will confirm a vocation to the Missionary Servants. This is particularly true of the mission stage of the novitiate. The presence of the MCF and Missionary Servant apostolates will be a priority.

The back and forth weaving of these areas takes place in the context of community. The identity of the novice makes manifest a clear transition from a focus on the “I” to the “we”. What will be nurtured is a real sense of fraternity for mission that strengthens, supports and transforms itself into the place from where the missionary goes forth to mission and the place to which he returns. It is in community with the brothers where he finds himself most at home.

Attention to human development is part of the spiral rhythm that weaves together all the stages in the Formation Program and is integrated with the other areas of formation by way of the spiritual dimension. In the encounter with the Lord (the spiritual dimension), a safe and secure context is created that permits an abundant degree of self-knowledge. Along with appropriate support, in the novitiate attention continues to be given to the following themes: family of origin, sexuality, interpersonal relationship, pastoral leadership that is collaborative in nature, aggression and conflict.

Structure of the Novitiate

In the novitiate, the students are formally initiated into the Congregation and they transition from laity to religious. The formal beginning of the novitiate takes place with a clothing ceremony where the men receive the Missionary Servant habit in the context of a simple ceremony that has been preceded by a retreat experience. As members of the Congregation, certain documents and policies now become relevant.³⁴

The novitiate year is divided into three phases: The Instruction Phase, the Mission Phase and the Integration Phase. In each of these phases the elements of *Experience* (listening to the voice of God), *Reflection* (What is God telling me?) and *Response* (To what is God calling me?) are very present.

A. The Instruction Phase: This phase is dedicated to instruction on the call to religious life and the vocation of a Missionary Servant of the Most Holy Trinity. It is important to note that this

³⁴ Please See Appendix for Declaration on Remuneration, on Use and Usufruct, Last Will and Testament and Declaration on Burial options.

phase is more a proposal to enter into dialogue with God rather than an academic exercise. Among the materials covered, the Constitution and Rule of Life of the Missionary Servants of the Most Holy Trinity are a privileged source of study and prolonged reflection during this phase.

The instruction materials are deliberate in promoting an *experience* of God, the one who calls forth a vocation to religious life as a Missionary Servant. This experience permits *reflection* in a setting that is prayerful and in the context of a fraternal community, offers a yes or a no to a future as a Missionary Servant. However, this is not enough, the outcome of the reflection needs to find congruent action, it must lead to a *response* that is congruent with the yes or a no to becoming a Missionary Servant.

This first segment of the novitiate, the Instruction Phase, lasts approximately eight months. There is an expectation that by the end of the Instruction Phase, the novice and the Congregation, through the ministry of the Novitiate Director, will come to clearly recognize the presence of a Missionary Servant vocation. This discernment will be confirmed by way of the next two phases in the novitiate.

This instruction phase is guided by three spiritual themes that are particularly important: The Exodus, Paschal and Pentecost events.

1. The Exodus theme begins with the retreat given in preparation for the formal beginning of the novitiate and will continue for approximately five months. This theme focuses on leaving all, a setting out on pilgrimage and the discovery, in a personal way that it is God the Father who takes the initiative, it is God who calls us forth and will sustain our future as religious, Missionary Servants of the Most Holy Trinity. The instruction that is presented is in service to this pilgrimage of discovery and encounter: Self-knowledge, prayer, spirituality, basic elements of Church doctrine, Scripture, liturgy, Christology, Ecclesiology, Apostolate, Church History, History of Religious Life, Cenacle History, Constitution and Rule of Life of the Missionary Servants of the Most Holy Trinity. It is important to note that the instruction given takes into account the level preparedness and background of the novice.

Prayerful reflection on personal history and the apostolate begins soon after an initial period of transition. Classroom instruction and workshops are the norm.

2. The second spiritual theme is the Paschal Event. The emphasis here is to create a disposition for an encounter with Our Lord, the second person of the Trinity, in his passion, death and resurrection. This resonates well with Father Judge's intuition of *intimate knowledge* of Jesus in the most profound moments of divine revelation. This intimate knowledge guides us towards the spiritual maturity that is required of the apostle and the professed.

During this period the themes of discipleship and discernment are included in the study of the gospel text. Also, during this time the practice of at least once a month "desert days" begins. The purpose of this practice is to ensure that the novice be available to

be alone and in silence with the Lord.

3. The third spiritual theme is Pentecost. This is the transition moment that anticipates the Mission Phase of the novitiate. The emphasis is Gospel love and the third person of the Trinity, the Holy Spirit. From the cross of Jesus, the divine breath comes to rest upon the disciple. The mature disciple, now aware of the guidance of the Holy Spirit that he has received, will now exercise that same spirit, a spirit for mission.
- B. The Mission Phase: During this second phase the novice will engage the reality of our missions. It is in terms of the reality of full-time ministry that the novice faces the challenge of the demands of his vocation, fidelity to prayer, life in community, liturgy, study, rest, etc. The mission phase lasts approximately two months. An integral part of this phase of the novitiate is a confirmation of the discernment that has been taking place all through the initial phase.

An immediate preparation for the Mission Phase includes a careful reflection that will identify the personal formation objectives for the novice. These formation goals will be integrated into the pastoral objectives of the mission site. Two tools that ordinarily will be used to facilitate this process are the Personal Growth Plan and the Mission Covenant. An Associate Novitiate Director will be named by the General Custodian and will be the mission supervisor of the novice. The expectation is that this associate director will meet formally with each novice during the mission experience. His task will be to offer support, guidance and the space necessary for reflection on the mission experience. At the end of the mission experience an evaluation is expected from both, the novice and the associate director.

- C. Reflection/Integration Phase. This is the final segment of the novitiate. In a more deliberately prayerful environment, its purpose is to bring together the first two experiences of the novitiate (Instruction and Mission) in preparation for the First Profession of Vows. Though reflection on the Vowed Life has been constant throughout the novitiate year, it is during this Integration Phase that a more profound study and reflection takes place as the instruction and mission phases are brought together.

Necessarily, it is a time when closure is brought to the several themes that have been part of the novitiate: Religious Life, Missionary Servant life, Constitution and Rule of Life. During this final phase, the “desert days” increase to a once a week experience in order to ensure periods of prolonged prayerful silence in anticipation of the First Profession of Vows. It is during this time that the personal identity of one’s vocation becomes concrete in the choosing of the novice’s *mystery*.

The discernment process ends with the proximate preparation for First Profession of Vows with an eight-day retreat.

Resources:

1. First of all, the primary resources are the members of the local VDC. The meetings take place at least once a month, in a conference call format. They are a source of personal

support for the director of formation, and it is a venue for counsel and feedback as well as mutual accountability. This is also an opportune place where the students can receive accompaniment across each stage of formation. And, lastly, the local VDC facilitates communication with the General Council with the formal participation of the VDC Director at least three times a year.

2. Didactic materials that facilitate the dialogue in the Novitiate with God in terms of having been called by God to religious life as a Missionary Servant of the Most Holy Trinity.
3. Places for mission and apostolate are an important resource, especially when members of the MCF are included.
4. Members of the MCF.
5. Documents and the like that are specifically Missionary Servant.
6. Ongoing professional preparedness of the director of formation. This is an area of specific responsibility for the director of the VDC; the ongoing education of the directors of formation.
7. Skills and strategies specific to this ministry such as interreligious gatherings, the Personal Growth Plan, etc..
8. Specific support for the novice such as spiritual directors and confessors.

CHAPTER 4

POST NOVITIATE STAGE

The Post Novitiate is the last stage of initial formation. The Formation Program, during this last stage, will seek to fortify the vocation of the professed student brother as well as his apostolic zeal. During this stage, preparation for the mission field is specific to the Missionary Brother or the priest vocation.

Once the novice pronounces his First Vows, he begins the Post Novitiate stage. The formation house for the post novitiate is characterized properly as a house for religious, Missionary Servants of the Most Holy Trinity. Life in community around a common table and the Eucharist are specific traits of this house. Here will be found men of faith, prayer and study, of apostolic zeal and men who have consecrated their lives to Our Lord. The Student Profile is now clearly visible:

- + He has a personal relationship with God that is nurtured by Cenacle spirituality.
- + He has a practical love for the charism.
- + He has a clear sense of belonging to our community and religious family.
- + He has an emotional maturity that at least corresponds to his chronological age. This maturity is characterized by the degree of personal integration, openness and freedom that makes him capable of making an option for vowed life.

- + Has an apostolic zeal that moves him towards the poor and abandoned, the preservation of the faith and a missionary labor that is characterized by collaboration and a sharing in the mission with the branches of the MCF.

The spiral process of the formation program is now focused on the apostolic dimension as the integrating element of the Post Novitiate. It is now the matter of a religious who needs the training necessary to live out his life as a Brother or as a priest. It is precisely the experience in the apostolate that will make manifest the gifts graced by God and the skills developed by the Brother. The experience in the apostolate becomes the context for dialogue with the General Council, the Director of the Post Novitiate and the Director of the VDC. The purpose of this dialogue is to uncover the pathways that will strengthen gifts and skills in favor of ministry in accord with the charism of the Missionary Servants of the Most Holy Trinity. Again, at this stage of formation, special attention to the vocation of a Missionary Brother is required. The formation process for a Missionary Brother cannot be confused with that of a cleric. It is precisely the experience in the apostolate that will offer important insights for the Brother's formation and will help make sure that the formation of Brothers is not confused with the formation of clerics.

In terms of the Brother's formation, participation in an apostolate, specifically Missionary Servant, will be a priority that will not be omitted unless there is a justifiable reason. This is especially relevant in terms of extended mission experiences. It is the exercise of mission that awakens the necessity of academic preparedness. The studies that will prepare the Missionary Brother will be identified in the context of mission, however, is important to be watchful making sure that studies do not become an obstacle to the vocation of a Missionary Brother. The studies that the Missionary Brother will pursue, for the sake of the mission, will be identified at this stage of formation as well as the corresponding centers of study that he will need. This may require that the Brother's residence be another Cenacle outside of the post novitiate.

In Religious Life, the formation of a religious priest is attentive to more than simply satisfying the canonical requirement for ordination. It is of the essence that attention be given to the formation necessary to respond to the mission entrusted to Missionary Servants of the Most Holy Trinity. Especially when the universities and theologates do not fulfill our mission expectations, workshops will be developed and participation, as necessary, in other courses outside of the academic campus is to be expected.

In terms of spirituality, there are clear expectations of a Religious including participation in exercises and spiritual practices as indicated by the Rule of Life. Furthermore, our spirituality is not just about a personal spiritual development, it is very much at the heart of our specific mission as Missionary Servants of the Most Holy Trinity. Our spirituality is in service to mission: *That every Catholic be an apostle* and mission with and for the *poor and abandoned*. It is in this context that the spiritual art of discernment receives special attention. Discernment has to do with recognizing the will of God in the life of the person and the missionary task; the where and how of mission.

Human development also bears a similar tonality. In the post novitiate, it is not just a matter of being attentive to one's personal growth; it is also about acquiring the tools necessary for pastoral practice.

In each area, we take note that because of the spiral nature of the Formation Program, one stage of formation is the foundation for the next stage. It is also to be expected that in the post novitiate, the professed is more and more proactive in his formation process. This is a hope and expectation, that the student will integrate the values and processes of the formation program and be independent of the formation structure as he enters full time ministry. This is especially important in the area of community life. Community life is part of the structure of the house of formation but will need to be cultivated "on the missions". From this sense of community and sense of belonging, that a personal responsibility for the future of the Cenacle is cultivated. The experience of community life cannot be overemphasized. Living together as brothers provides us with the support we need for a faithful living of the vows and makes us more effective missionaries. Further, this is part of an ethical responsibility in ministry with adults.³⁵

Structure of the Post Novitiate

The structure of the Post Novitiate has several basic contours and some that are specific to the individual case. It is of utmost importance to continue to insist that care be given to the Missionary Brother's vocation. It cannot be emphasized enough; the formation process for a Missionary Brother may not be determined by the formation process for a priest.

Initiation into the Post Novitiate. At the beginning of the post novitiate attention is given to an initiation into this phase of formation. This is a period of orientation and concrete information. This stage makes sure that there is clarity of goals, methods, purposes and expectations as the post novitiate stretches from First Profession to a first full-time mission assignment. The following are starting points:

- + Specifics to each of the five areas of formation.
- + The Missionary Servant curriculum.
- + Expectations of life in community as a religious.
- + Development of a Personal Growth Plan
- + Relationship with family, friends and persons from the apostolate.
- + Legal and Immigration requirements.
- + Praesidium requirements.
- + Review of Document Retention Policy.
- + Review of student file.

³⁵ See Appendix X Ethical Relations in Ministry with Adults.

First Renewal of Vows. The first stage is the period between the profession of First Vows and the First Renewal of vows. Temporary religious profession is to be made annually for at least three years until the time for Perpetual Profession (Constitution 42. 4)³⁶. Giving due attention to Canon Law guidelines (c 655-657), we note that our Formation Program is not measured chronologically or is dependent on an academic schedule. What guides our Formation Program is the integral growth and development of the person in response to God’s call as a movement towards Final Vows and a first mission assignment. Along with the Curriculum, attention will be given to the following:

- + Follow up on Personal Growth Plan.
- + Apostolate/mission experience.
- + Academic process.
- + Identification and provision for pastoral workshops.
- + Assessment of readiness for renewal of vows.
- + Spiritual preparation for renewal of vows.
- + Identification of formation goals for the following year.

Subsequent renewal of vows follows the above process. This may never be something pro forma; it needs to be attentive to the information gathered by life in community, apostolic zeal, evaluations from mission sites, evaluations especially from the Mission Year and disposition and capacity for the mission of the Missionary Servants of the Most Holy Trinity.

Our experience of religious life as Missionary Servants is attentive to preparedness for the apostolate as fully as possible. Hence, the institution of the ministries of Lector and Acolyte is to take place before the Mission Year. We take note that our Rule of Life in numbers 14 and 15 point to the heart of our Missionary Servant identity as religious: *We will hold the Word of God in high esteem* and *The Eucharist will be the Sun and center of our apostolic life*. Without diminishing the value that these ministries have for the diocesan clergy, we hold that these ministries flow from our very identity and will not be confused with the ancient tradition of “minor orders” that anticipated priesthood ordination. The institution of these ministries will take place with all professed students, given appropriate preparation and in consultation with the General Custodian.

After prayer and the counsel of the spiritual director and the director of the post novitiate, the professed petitions of the General Custodian the institution of the ministries of Lector and Acolyte. The petition is made in written form.

Ordinarily, the Mission Year takes place after the second renewal of vows and concludes with an eight-day retreat. A characteristic of the mission site is that it challenges and stretches the man in temporary profession, even beyond what might be considered ordinarily difficult. This is to be a full-time mission experience in works of the Missionary Servants. In identifying mission sites, it is important that non-parochial apostolates not be excluded and give due consideration to the

³⁶ The General Custodian and his Council can extend the temporary vows, but for no longer than three years (Const. 42.4).

possibility of several assignments during this same mission year. In the case of a Missionary Brother, it will be important that the Mission Year be dedicated to works that are specific to a Missionary Brother's vocation.

This is a period of assessment of the individual's pastoral preparedness, more specific discernment of the person's gifts for the mission and confirmation of a Missionary Servant vocation. Subsequent formation will be based on the mission experience and tailored to the individual's final preparedness for mission, again, with special attention to the Missionary Brother's vocation.

Each mission assignment requires a tool for reflection and discernment, in the post novitiate the tool that is used is a Mission Covenant. This covenant has to do with a process of discernment that brings together the Student Brother, the director of the post novitiate and the mission site director. The result of this discernment process is precisely the development of the Mission Covenant for this most important year³⁷.

It is important to note that the norm approved by the General Custodian is that the professed student, ordinarily after the second year in the post novitiate will acquire whatever legal documents required to travel outside of country. Given the different countries where we serve and changing nature of immigration policy, appropriate consultation will be necessary. This is an important step to take so that the student be more available for mission. This norm is added to what has already been established, the insistence that students acquire the languages that make them more available for mission. Presently, Spanish and English are the two languages that are singled out as most important.

A final stage of the Post Novitiate is the period of approximately one year immediately prior to Final Vows. This is a year that is constant in its focus on integration. The entire initial formation and discernment process is ending and more dialogue with the General Council takes place in preparation for full time life and ministry in one of our missions.

Preparations for a thirty-day retreat, fulfillment of academic requirements, identification of the site for the celebration of final vows, the gathering of all pertinent documents and any other requirements will be done in a timely fashion.

Transition Stage. For all Missionary Servants, the Final Vows ceremony is the focal point of our primordial identity as Religious. All Missionary Servants receive the Mission Cross as part of the final vow ceremony. It is a requirement that the professed petition in written form, of the General Custodian, permission to profess final vows. The professed approaches this petition only after prayer and the support and counsel of his spiritual director and director of the post novitiate. Preparation for this ceremony takes place in dialogue with the Director of the Post Novitiate, the Director of the VDC and the General Council³⁸.

³⁷ See Appendix XVI Mission Year Covenant

³⁸ See Appendix, XVII Norms for Final Vows and Ordinations

It is also noted that due preparation is required for deaconate and priesthood ordinations. As part of the preparation, it is also important to recognize the need to petition the General Custodian permission to proceed to the ordination, after prayer and the support and counsel of his spiritual director and director of the post novitiate.

The discernment of a first assignment with the General Council, considering such things as culture and language of first assignment and introduction to the mentoring program are samples of what needs to take place at this time.

Resources

1. The annual evaluation of the Vocation Development Committee.
2. Mission Year evaluation.
3. Bi-annual evaluation of the Post Novitiate.
4. The Post Novitiate team.
5. Annual retreat.
6. Weekly House Council meeting.
7. Weekly reflection.
8. Visits by members of the Missionary Cenacle Family.
9. Spiritual Directors.

Missionary Servants Formation Handbook

Appendix

Appendix I	Developing a Personal Growth Plan	Page	33
Appendix II	Policy on Record Retention for Members	Page	42
Appendix III	Transition File	Page	46
Appendix IV	Information Sheet	Page	47
Appendix V	Required Formation Documents	Page	51
Appendix VI	Praesidium Standards of Accreditation	Page	55
Appendix VII	Sexual Abuse Policy, Inappropriate conduct with minors	Page	58
Appendix VIII	Internet and Social Networking Policy	Page	70
Appendix IX	Format: Evaluation of Internet and Social Network use	Page	72
Appendix X	Policy on Ethical Relations in Ministry with Adults	Page	73
Appendix XI	Burial Policy	Page	92
Appendix XII	Last Will and Testament	Page	93
Appendix XIII	Power of Attorney, Durable Will	Page	95
Appendix XIV	Declaration on Remuneration	Page	98
Appendix XV	Declaration on Use and Usufruct	Page	99
Appendix XVI	Mission Year Covenant	Page	100
Appendix XVII	Policy Regarding Final Vows and Ordinations	Page	101
Appendix XVIII	Mission Plan	Page	104
Appendix XIX	Departure Form	Page	105
Appendix XX	Regarding Petition to Apply by Religious or Clerics	Page	107
Appendix XXI	The Granting of Access to Confidential Documents	Page	109
Appendix XXII	Psychological Testing	Page	110
Appendix XXIII	Policy on visiting and residing in Missionary Cenacles	Page	111
Appendix XXIV	Policy on Prospects from outside the American Continent	Page	113
Appendix XXV	Vocation Promotion Process	Page	114

Appendix I: Personal Growth Plan

DEVELOPING A PERSONAL GROWTH PLAN

The overall goal of the Formation Programs is to integrate and foster one's spiritual development, emotional and affective maturity, apostolic spirit, intellect, and physical health within the context of the Church, Religious Life and the evangelical counsels, and the living of community within the framework of the charism of the Institute. To this end a personal growth plan is developed by the student with the counsel of his formation director. The development of this plan allows the student to participate directly and with personal responsibility in the task of formation. This is one characteristic of Missionary Servants, that of being proactive and not passive, as we face the challenges of our vocation. At the same time, this document becomes an objective tool that measures the movement of the vocation processes itself. The Personal Growth Plan will be an important tool in the discernment and transition from one stage of formation to another.

This plan should be clear, specific, measurable, and realistic. It should flow from discussion and/or reports from all the following: formation director, spiritual director, consulting psychologist, and others interested in your growth as well as your own prayer and reflection on your experience, honest self-appraisal, and all else that helps you better know yourself.

To develop this plan, you are asked to follow these steps:

1. Gather and read any previous evaluations by others, counselors, psychological evaluations, your journals with recommendations pertinent to planning.
2. Find a quiet prayerful place.
3. Reflect on the questions in each of the areas of formation found on the accompanying sheets.
4. Write down the priority needs that occur to you as the result of this reflection.
5. Select from this list of priority needs one or two from each section you wish to address in this personal growth plan.
6. Develop a plan for each of the selected needs. Your plan should include:
 - a) A statement of your objective expressed in terms that are clear, specific, and realistically attainable within a specified period.
 - b) Some initial reflections on resources and means by which your objectives can be pursued.
 - c) An attempt at scheduling i.e. how you can introduce your project to your routine.
 - d) Date for evaluation.
7. Write out the total Personal Growth Plan using the model format.
8. Provide a copy and discuss with your Formation Director and Spiritual Director.
9. After feedback, finalize the growth plan and have the director(s) sign with you.

REFLECTION GUIDE: DEVELOPMENT OF A PERSONAL GROWTH PLAN

Discovery of priority needs

I. Emotional Maturity. A level of emotional maturity which corresponds to one's chronological age and what is expected during the program's level of formation. The observation of behavior will be used to evaluate emotional maturity. What is included here is how the person participates in the formation program. How does he engage with persons and events? How does he deal with confrontation, disillusionment and other events?

A. Listen to yourself and see what felt needs you have in this area. Reflect on:

1. Are you happy with yourself?
2. Are you happy with decisions you have made up to this point of your life?
3. Can you own your feelings or are you inclined to blame others?
4. Are you able to express your feelings? Which are easier to express? More difficult to express?
5. How do you handle anger? What is your behavior/process?
6. How do you handle loneliness?
7. Are you overly dependent or excessively independent?
8. Do you accept and carry out responsibility?
9. Are you aware of your need to control a situation or desire for perfectionisms?
10. Are you able to accept your limitations? Can you admit mistakes?
11. Do you appreciate and use feedback?
12. Are you able to confront others?
13. Are you able to affirm others?
14. Are your behavior, dress, and reactions similar to other members of the community in formation?
15. How do you see yourself, is it more positive or negative?
16. What do you like and what do you dislike about what you see?
17. What are your personal needs? How are you getting those needs met?
18. How aware are you of your motivations i.e. why do you do what you do?
19. How do others see you?
20. What do others like about you? Dislike about you?

B. What are the priority needs regarding emotional maturity?

II. Spirituality. *The Cenacle Spirit is a prayerful spirit, a Gospel spirit. a Christ like spirit.* There is a challenge to participate in the development of a spirituality that is in accord with Religious Life, the Missionary Cenacle charism and the life of the evangelical counsels. Observable behavior gives an indication of one's interior life. Is there a personal investment in prayer, liturgy and spiritual literature? Is the student a person capable of sharing his faith with openness and good will? How is he progressing in spiritual direction? Does he possess an honest and open attitude before his director in terms of his spiritual life?

A. Listen to yourself and see what felt needs you have in this area. Reflect on:

1. When are you aware God is with you?
2. How would you describe your relationship with Jesus?
3. What have been your best prayer moments?
4. What are your forms of personal prayer? Are you pleased with them?
5. Are the Scriptures a part of your prayer life? How?
6. Are you comfortable in prayer with others?
7. How is spiritual direction contributing to your spiritual development?
8. Are you willing to share your time and talent with others?
9. Are you responsible in the care and use of personal and communal property?
10. Are you living simply? What does "living simply" mean to you?
11. How are you dealing with your personal budget? Are you aware of where your moneys go?
12. Do you have friends in whom you confide? Is there at least one person you can tell everything to?
13. Are your relationships with men and women healthy and mature?
14. Are you aware of any jealousy and competitiveness in your relationships?
15. Are you aware of your sexual orientation and comfortable with your sexuality?
16. How do you assess your ability to live a celibate life?
17. How do you relate with people in authority?
18. How do you deal with persons in authority when you do not agree with them?

B. What are the priority needs regarding your spirituality?

III. Apostolic Spirit. *The spirit of the Cenacle is an apostolic spirit.* An apostolic spirit is a complement and essential part of our spirituality. Personal love for the Triune God must lead to and manifest itself in personal service to others, especially the poor and abandoned. One cannot be ignored in favor of the other and a balance necessary for a life of contemplation in action. The student and the director will be attentive to the inherent tension between contemplation and action. Is there a dichotomy in the student between his religious exercise and behavior? What is it that attracts him the most to Religious Life? What is it that motivates his apostolic zeal? Is his natural tendency to be attracted to a ministry that supports the role of laity?

A. Listen to yourself and see what felt needs you have in this area. Reflect on:

1. Are you a person who has concern and compassion for people?
2. Have you a desire to be of service to others?
3. Can you accept hardship and self-sacrifice in order to serve others?
4. Are you aware of any racial, ethnic or sexist prejudices?
5. How do you relate your concern for people with the ministry of Jesus and the mission of a Religious?
6. What is most distinguishing to you about Missionary Servant religious life?
7. Do you pray with and with those you minister to and with?

8. How does your spirituality support and enrich your ministerial activity?
9. Does your ministry support and enrich your spirituality?
10. How do you live the Church's commitment to peace and social justice?
11. Are you able to share and collaborate in ministry with others, religious, lay and clergy?
12. What gifts and talents do you have which you will be able to use in future ministerial work?
13. How would you assess your current pastoral skills e.g. Listening, empathic responding, helping, teaching, guiding, and empowering?
14. In what area would you want to improve your skills?

B. What are the priority needs in fostering an apostolic spirit?

IV. **Community:** Community life is fundamental to one's identity as a Religious and the mission of the Institute. How does the student relate to community, his peers and persons in authority? Is he someone with whom one would be willing to share the same mission assignment? How does he identify himself with the rest of the community in terms of values and loyalty? Does he contribute to the prophetic role of the community?

A. Listen to yourself and see what felt needs you have in this area. Reflect on:

1. How do you get to know and be known by others?
2. Are you sensitive to the needs of other members of the community?
3. Are you able to share your needs with your local community?
4. Are you able to talk through conflicts with others?
5. Are you faithful in performing the work and responsibilities of community living?
6. Are you someone who takes the initiative or waits for someone to tell you what tasks are necessary in terms of community living?
7. How do you participate in community meetings? What do you listen for?
8. Are your needs for intimacy being met in some ways in community? Are these needs appropriate?
9. Do you find yourself engaging in unique behaviors with other community members, i.e. storytelling, gossip, put -down humor, debates, athletics etc..? Are you aware of these behaviors and find them appropriate?
10. Do you feel like you belong to the community? In what ways?
11. How does and can community support you for your apostolic service?
12. Do you understand and appreciate the charism of the community and see yourself sharing in those values with other members?

B. What are the priority needs for community life?

V. **Intellectual Development.** There is a need to demonstrate the intellectual capacity and development necessary for a missionary in today's Church. This includes the academic aptitude that is required of the ongoing preparedness for ministry but also the intellectual skills that are required to dialogue with the world from the perspective of the Reign of God.

Does study nurture the student? Does the apostolate ask of the student to be creative in his ministerial response?

A. Listen to yourself and see what felt needs you have in this area. Reflect on:

1. Which of the courses/seminars/input - sessions do you find most challenging? Most difficult? Why?
2. Do you see a connection between the reality of life for a Religious and what you are learning/reading?
3. To what degree are you able to express your convictions instead of repeating what you have read or a teacher has said?
4. What relationship do you see between mission and intellectual development?
5. What changes have you become aware of as a result of your studies?
6. What areas or topics have you found yourself resisting or rejecting in your academic pursuits? Do you know why?
7. Are you able to keep up with the readings and papers required?

B. What are the priority needs regarding intellectual development?

VI. Health. The ideal is that we seek a sound mind and a sound body. Physical wellbeing and freedom from disease and ailments are important for the fulfillment of a Missionary Servant vocation. We are expected to have and maintain a level of health necessary for the fulfillment of one's duties. In addition, one should have developed healthy recreational and social interests. Does the student take adequate care for himself? Does he feel "at home" with himself?

A. Listen to yourself and see what felt needs you have in this area. Reflect on:

1. What priority do you give to personal health?
2. How regular have been your medical exams?
3. What are your eating, rest, sleeping, exercise, recreation patterns?
4. How have you balanced leisure and work?
5. What are the main sources of stress in your life? How do you handle these areas of stress?
6. How do you know when you are not handling stress adequately?
7. How do you define an addiction?
8. Are you aware of any addictions?
9. What is your alcohol and tobacco patterns of consumption?
10. How dependent are you on medications, drugs?

B. What are the priority needs regarding health issues?

VII. Commitment. There is an expectation that the person will manifest a deepening commitment and sense of being called by God to be a Missionary Servant of the Most Holy Trinity. This sense of commitment is something that evolves but is evident and present to the degree that it offers a promising sense of potential for his future life. An indication of commitment will be observed especially in his living out of the evangelical counsels in community. “Do the shoes fit?” Is there an indication that the same spirit that moved Fr. Judge is found in the student? Does he have a missionary vision that flows from the Cenacle spirit?

A. Listen to yourself and see what felt needs you have in this area. Reflect on:

1. Do you have a deepening conviction about Gospel - Discipleship?
2. Is there a central place in your life, for Christ and prayer? How do you know?
3. Do you have a planned and executed spiritual reading and learning program?
4. Are you willing to share your faith willingly and openly?
5. Is there evidence in your life of a growth in desire and ability to serve the People of God as a Missionary Servant?
6. Do you have a sensitivity for the poor, lonely and marginated?
7. Is there evidence of the ability to live the evangelical counsels?
8. Are you present and a contributing member to your local community?
9. Can you deal with solitude and yet have the capacity for friendships on various levels?
10. Do you have a realistic capacity to deal with authority and the decision-making process of the community?
11. Are you able to work with a diversity of personalities and ages taking a personal interest in the life of the community and its mission?

B. What are the priority needs regarding commitment?

PERSONAL GROWTH PLAN: FORMAT

Personal Growth Plan for: _____

Dates: _____

Emotional Maturity

What are your priority needs regarding emotional maturity?

Objectives, **what** will you do to respond to your priority needs?

Means/Resources/Plan – **How** will you respond to your priority needs?

Scheduling, **when** will you respond to your priority needs?

Spirituality

What are your priority needs regarding spirituality?

Objectives, **what** will you do to respond to your priority needs in this area?

Means/Resources/Plan – **How** will you respond to your priority needs in this area?

Scheduling, **when** will you respond to your priority needs in this area?

Apostolic Spirit

What are your priority needs regarding apostolic spirit?

Objectives, **what** will you do to respond to your priority needs in this area?

Means/Resources/Plan – **How** will you respond to your priority needs in this area?

Scheduling, **when** will you respond to your priority needs in this area?

Community Life

What are your priority needs regarding community?

Objectives, **what** will you do to respond to your priority needs in this area?

Means/Resources/Plan – **How** will you respond to your priority needs in this area?

Scheduling, **when** will you respond to your priority needs in this area?

Intellectual Development

What are your priority needs regarding intellectual development?

Objectives, **what** will you do to respond to your priority needs in this area?

Means/Resources/Plan – **How** will you respond to your priority needs in this area?

Scheduling, **when** will you respond to your priority needs in this area?

Health

What are your priority needs regarding your personal health?

Objectives, **what** will you do to respond to your priority needs in this area?

Means/Resources/Plan – **How** will you respond to your priority needs in this area?

Scheduling, **when** will you respond to your priority needs in this area?

Commitment

What are your priority needs regarding commitment?

Objectives, **what** will you do to respond to your priority needs in this area?

Means/Resources/Plan – **How** will you respond to your priority needs in this area?

Scheduling, **when** will you respond to your priority needs in this area?

Your signature _____

Formation Director _____

Spiritual Director _____

Appendix II: Policy Retention

Policy on Record Retention for Members

A key principle to guide a policy on record retention for members is Respect for the Member. This principle requires:

- Confidentiality, which has to do with the expectations of the member.
- Privacy. A legal term that is narrowly defined in civil terms but has to do with the dignity of the individual as a person.
- Privilege that has to do with a professional relationship.

As a “rule of thumb” the questions, “what was the original purpose of the document?” and “what purpose does it fulfill in the present and the future”? are important.

Records are retained for members in several places:

1. Generalate
2. Archives
3. Treasurer General’s Office
4. Communications Office
5. Vocations Development Committee Office
6. Pre-Novitiate Office
7. Novitiate Office
8. Post Novitiate Office.

In the Archive, Treasurer General and Communication offices, information is retained that is not privileged. It is common information and biographic in nature.

At the Generalate the following documents are retained

1. Initial information sheet of each of the aspirants approved for the pre-novitiate.
2. Information Summary: Information sheet on each one of the men in formation.
3. Required Information. An information sheet that is updated by each stage of formation including photo.
4. Report certifying compliance with Praesidium.
5. Initial application.
6. Psychological exams and reports.
7. Medical exams.
8. Reports by each formation director and apostolate reports.
9. Church documents.
10. Legal documents.
11. Academic documents.
12. Documentation regarding profession and ordination.
13. Official correspondence with the member.
14. Accusations of sex abuse.

15. Letters of obedience.
16. Recent Photos.
17. Immigration documents/information.
18. Other.

The General Custodian and Secretary General have access to the Generalate archives. Per need, delegation is granted to members of the General Council.

Vocations Development Committee

The Office of the Vocations Development Committee ordinarily functions as a transitory depository of documents. The VDC director has access to the documentation of each of the men in formation in fulfillment of his role. At the same time, it is his responsibility to ensure that required documentation is transmitted from one office to another. Documentation retained in his office, physical or digital that is not transitory includes notification of departure from the program.

In the Vocations Promotion Office, the following is retained:

1. Information Summary: Information sheet on each one of the men approved for the Pre-novitiate.
2. Required Information. An information sheet that is updated by each stage of formation including photo.
3. Report certifying compliance with Praesidium.
4. Initial application.
5. Psychological exams and reports.
6. Medical exams.
7. Church documents.
8. Legal documents.
9. Academic documents.
10. Official correspondence with the member.
11. Recent Photos.
12. Immigration documents/information.
13. Notice of departure from process.
14. Other.

The Vocation Promotion Director has access to the documentation of each of the men in fulfillment of his role. Per need, the Director may delegate members of his team access to the documentation. At the same time, it is his responsibility to ensure that required documentation is transmitted from one office to another. Documentation retained in his office, physical or digital that is kept under lock and key and/or password protected.

The Pre-Novitiate Office retains the following:

1. Initial information sheet of each of the aspirants approved for the pre-novitiate
2. Information Summary: Information sheet on each one of the men in formation.
3. Required Information. An information sheet that is updated by each stage of formation including photo.
4. Report certifying compliance with Praesidium.
5. Initial application.
6. Psychological exams and reports.
7. Medical exams.
8. Reports from Vocation Promotion.
9. Church documents.
10. Legal documents.
11. Academic documents.
12. Official correspondence with the member.
13. Recent Photos.
14. Immigration documents/information.
15. Notice of departure from process.
16. Other.

The Pre-Novitiate Director has access to the documentation of each of the men in fulfillment of his role. Per need, the Director may delegate members of his team access to the documentation. At the same time, it is his responsibility to ensure that required documentation is transmitted from one office to another. Documentation retained in his office, physical or digital that is kept under lock and key and/or password protected.

In the Novitiate, the following is retained

1. Initial information sheet of each of the aspirants approved for the pre-novitiate
2. Information Summary: Information sheet on each one of the men in formation.
3. Required Information. An information sheet that is updated by each stage of formation including photo.
4. Report certifying compliance with Praesidium.
5. Initial application.
6. Psychological exams and reports.
7. Medical exams.
8. Reports from directors of previous stages of formation.
9. Church documents.
10. Legal documents.
11. Academic documents.
12. Documentation on religious profession.
13. Official correspondence with the member.
14. Recent Photos.
15. Immigration documents/information.
16. Notice of departure from process.
17. Other.

The Novitiate Director has access to the documentation of each of the men in fulfillment of his role. Per need, the Director may delegate members of his team access to the documentation. At the same time, it is his responsibility to ensure that required documentation is transmitted from one office to another. Documentation retained in his office, physical or digital that is kept under lock and key and/or password protected.

In the Post-novitiate the following is retained:

1. Initial information sheet of each of the aspirants approved for the post-novitiate
2. Information Summary: Information sheet on each one of the men in formation.
3. Required Information. An information sheet that is updated by each stage of formation including photo.
4. Report certifying compliance with Praesidium.
5. Initial application.
6. Psychological exams and reports.
7. Medical exams.
8. Reports from directors of previous stages of formation.
9. Church documents.
10. Legal documents.
11. Academic documents.
12. Documentation on religious profession and ordination.
13. Official correspondence with the member.
14. Recent Photos.
15. Immigration documents/information.
16. Notice of departure from process.
17. Other.

The Post Novitiate Director has access to the documentation of each of the men in fulfillment of his role. At the same time, it is his responsibility to ensure that required documentation is transmitted from one office to another. Documentation retained in his office, physical or digital that is kept under lock and key and/or password protected.

Appendix III: Transition File

The Transition File will have the following contents

This file is transmitted from one stage to the next, with each stage adding the appropriate documents.

1. Documents retained.
2. Summary sheet: Information on each of the men in formation.
3. Required documentation: Sheet updated for each stage of formation, including photo.
4. Personal growth plan.
5. Other.

Appendix IV: Information Sheet

INFORMATION SUMMARY SHEET

In providing the information, use as much space as necessary, maintain the format.

<u>CIVIL INFORMATION/INFORMACIÓN CIVIL</u>	PHOTO
<p>Full Legal Name/ Nombre Completo:</p> <p>Present Address/ Domicilio actual:</p> <p>Phone Number/ Número de Teléfono:</p> <p>Email/Correo Electrónico:</p> <p>Date of Birth/ Fecha de Nacimiento:</p> <p>Place of Birth/ Lugar de Nacimiento:</p> <p>Diocese of Birth/Diócesis de Nacimiento:</p> <p>Languages spoken/ Idiomas que domina:</p> <p>Social Security Number/ Número de Seguro Social o Equivalente:</p> <p>Driver's License Number/ Número de Licencia Vehicular:</p> <p>Citizenship/Ciudadanía:</p> <p>Passport Number/ Número de Pasaporte:</p> <p>Pertinent Immigration information/ Información Migratoria Pertinente:</p>	
<u>ECCLESIASTICAL INFORMATION</u>	
<u>INFORMACIÓN ECLESIASTICA</u>	
<p>Date of Baptism/ Fecha de Bautismo:</p> <p>Parish of Baptism/Parroquia de Bautismo:</p> <p>Diocese of Baptism/ Diócesis de Bautismo:</p> <p>Date of Confirmation/ Fecha de Confirmación:</p>	

Parish of Confirmation/ Parroquia de Confirmación:

Diocese of Confirmation/ Diócesis de Confirmación:

Parish before entering the formation program/ Parroquia Antes del Programa de Formación:

Diocese before entering the formation program/ Diócesis Antes del Programa de Formación:

ACADEMIC INFORMATION/INFORMACIÓN ACADÉMICA

Please make note of any official seals as necessary/Favor de anotar apostillado donde necesario

Academic standing upon entering the formation program/Estatus académico al iniciar el programa

High School/ Preparatoria:

Dates/ Fechas:

Name/ Nombre:

Location/ Lugar:

College/ Universidad

Dates/ Fechas

Name/ Nombre

Location/ Lugar

Degree/ Título

College/ Universidad

Dates/ Fechas

Name/ Nombre

Location/ Lugar

Degree/ Título

College/ Universidad

Dates/ Fechas

Name/ Nombre

Location/ Lugar

Degree/ Título

FORMATION PROCESS INFORMATION/ INFORMACIÓN:
PROCESO DE FORMACIÓN

Pre Novitiate/ Pre-Noviciado

Dates/ Fechas:

Place/ Lugar:

Novitiate/ Noviciado

Mystery/ Misterio

First Profession/ Primera Profesión:

Dates/ Fechas:

Place/ Lugar:

Post Novitiate/ Pos Noviciado

Brother or Cleric/ ¿Hermano o Clérigo?:

Dates/ Fechas

Place/ Lugar:

Renewals/ Renovación de Votos

Place and Date/ Fecha y lugar

Final Vows/ Votos Perpetuos:

Place and Date/ Fecha y lugar

Year of Mission/ Año de Misión

Place and Date/ Fecha y lugar:

Ministries, Lector and Acolyte/ Ministerios, Lector y Acólito

Place/Lugar

Date/Fecha

Person conferring/Persona que confiere:

Diaconate/Diaconado

Place, Date and Bishop/ Fecha, Lugar y Obispo

Priesthood/Sacerdocio

Place, Date and Bishop/ Fecha, Lugar y Obispo

FAMILY INFORMATION/INFORMACIÓN DE FAMILIA

Parent's names, address, contact information/ Nombre de papas, domicilio, información de contacto:

Pertinent information regarding parents (separated, deceased...)/ Información pertinente sobre papás (separados, decesos.)

EMERGENCY INFORMATION/ INFORMACIÓN EN CASO DE EMERGENCIA

Contact Person/ Persona de Contacto:

Blood Type/ Tipo de Sangre

Medical History/ Historial médico:

Appendix V: Required Formation Documents

Policy: Required Formation Documents

		<i>Responsible</i>
1	Summary Information Sheet	All Programs
	<i>Vocation Promotion</i>	
2	Admission Application	Vocation Director
3	Letter of Recommendation from Vocation Director	Vocation Director
4	Questionnaire from Vocation Office	Vocation Director
5	Five Letters of Recommendation. At least one from a family member and two from his profession.	Vocation Director
6	Documentation attesting to at least two personal interviews with members of the Congregation.	Vocation Director
7	Autobiography	Vocation Director
8	Confidentiality consents	All Directors
9	Letter of Recommendation for entry into the Pre-Novitiate by the Board of Admissions.	Vocation Director
	<i>Personal Documents</i>	
10	Birth Certificate (verify names with all other documents).	Vocation Director
11	Copy of Passport(s)	Vocation Director
12	Copy of Visas	Vocation Director

13	Copy of any relevant military service documents	Vocation Director
14	Copy of Driver's License (Expected before entry into Novitiate)	Vocation Director
15	Recent copy of Baptismal certificate with marginal notations and address of parish.	Vocation Director
16	Confirmation certificate	Vocation Director
17	Church Marriage Certificate if applicable	Vocation Director
	<i>Health Care Documents</i>	
18	Emergency Contact List	All Program Directors
19	Complete Medical Exam	Vocation Director
20	HIV Test	Vocation Director
21	Dental Exam	Vocation Director
22	Eye Exam	Vocation Director
23	Psychological Exam with recommendations	Vocation Director
24	Psychosexual interview	Vocation Director
25	Other Psychological studies as applicable (i.e., Briggs)	Vocation Director
26	Review of Social Media	Vocation Director
	<i>Academic Records and Documentation</i>	
27	High School	Vocation Director
28	College and Graduate (as applicable) especially Philosophy and Theology.	All Program Directors

	<i>Apostolate Documentation</i>	
29	Listing of apostolate and mission participation	All Program Directors
30	All apostolate and program evaluations/recommendations	All Program Directors
	<i>Child Protection</i>	
31	Criminal Background Check (Live Scan)	Vocation Director
32	National Sex Offenders Check	Vocation Director
33	Diocesan Requirement compliance	Pre-Novitiate, Novitiate and Post Novitiate Directors
34	Documentation attesting to having received and studied Sex Policy of Missionary Servants	Pre-Novitiate
35	Documentation attesting to having received and studied Internet Policy	Pre-Novitiate
36	Documentation attesting to having received and studied Policy on Ethical Relations in Ministry with Adults.	Post-Novitiate
37	Presidium Standard compliance. Each Director, because of education or experience, needs to be capable of recognizing students who may be a risk to minors.	Pre-Novitiate and Post Novitiate Directors
	<i>Legal Documents</i>	
38	Medical Power of Attorney	All Directors
39	Declaration on Remuneration	Novitiate Director

40	Declaration on Use and Usufruct	Novitiate Director
41	Last Will and Testament	Novitiate Director
42	Declaration on Burial Option	Novitiate Director
	<i>Program Transition Documents</i>	
43	Departure Form	Corresponding Director
44	Regarding entry into the Novitiate	Pre-Novitiate Director
45	Regarding First Vows	Novice Director
46	Regarding Renewal through Final Vows	Post Novitiate Director
47	Regarding Ministries	Post Novitiate Director
48	Regarding Diaconate	Post Novitiate Director
49	Regarding Priesthood	Post Novitiate Director

STANDARDS OF ACCREDITATION

Standards for Prevention

Standard 1. The Institute will screen new Candidates for membership in the Institute - A *candidate* is an individual who is applying for membership.

Rationale: *Screening is one of the most developed areas of sexual abuse prevention within child-serving organizations. Those who sexually abuse minors may look for employment or volunteer positions where they can have access to minors. The first action an Institute can take to keep its ministries safe is to carefully screen everyone who has access to minors. Indeed, most seminaries and religious formation programs have required a thorough, comprehensive screening of candidates³⁹ for many years. Specific screening and selection procedures can prevent a potentially harmful Candidate from gaining access to minors.*

Requirements for accreditation:

R1. Candidates will be specifically screened for a history of sexually abusing minors or violating the boundaries of minors.

R2. Each Candidate must have the following documentation:

- a. A completed background check, which includes each state/county that the Candidate has resided in for the past seven years and a national sex offender registry check⁴⁰.
- 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 which was conducted by a licensed psychologist, and a psycho-sexual history which was 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.
- e. A review of publicly accessible content on all social media, personal blog sites, and web sites associated with accounts controlled by the Candidate.

³⁹ Person in application process.

⁴⁰ Outside of the US, please see Clarification C3

R3. A Candidate who has an established allegation of sexually abusing a minor in his past, or who has acquired/intentionally viewed child pornography, cannot be permitted to continue to Membership in the Institute.

R4. Vocation directors and formation directors must be able, by education, training or experience, to identify Candidates who may be at risk to sexually abuse a minor.

Clarifications:

C1. The requirements outlined in R2 above may be completed at any time prior to the Institute's acceptance of the Candidate into the novitiate. However, prior to the Candidate being placed in or recommended for any form of service to the public, the Institute must complete the requirements set forth in R2a, R2b, R2c and R2e above.

C2. There are many valid and appropriate psychological tests and procedures for conducting background checks that an Institute may use to screen Candidates. Therefore, there are no specific requirements for psychological tests or methods for conducting criminal background checks that the Institute must follow to comply with this Standard.

C3. Criminal background checks of Candidates from countries outside the United States should be conducted to the best ability of the Institute, recognizing that some countries may not record such information or provide it to the Institute.

C4. It is recognized that psychological testing for some Candidates from outside the United States may not have the same level of validity as the testing for United States Candidates, increasing the importance of other methods of evaluation and screening that the Institute must follow in order to properly screen foreign Candidates.

C5. It is further recognized that the cultural values of the United States are not universal values; assessment of a Candidate or Member from a different cultural background should include evaluation of the individual's ability to adapt to the cultural requirements of ministry in the United States. Assistance may be found in the *USCCB Guidelines for Receiving Pastoral Ministers in the U.S. Third Edition*.

Standard 2. At each stage in the initial formation of Members, the Institute will assist in their ongoing growth toward a healthy sexuality as a foundation for celibate chastity.

Rationale: *The majority of cases of sexual abuse of minors that are being addressed today originate from incidents that occurred in the 1960s and 1970s. After that period, there is a significant drop in the number of cases (John Jay College of Criminal Justice, "The Nature and*

Scope of the Problem of Sexual Abuse of Minors by Catholic Priests and Deacons in the United States,” 2003) *Many attribute this decrease to major changes in seminaries and houses of formation in the 1980s, when these institutions began to comprehensively address issues surrounding healthy human development and sexual integration. This major, positive shift has been recognized as a key contribution to overall sexual abuse prevention efforts.*

Requirements for accreditation:

R1. Members in formation must be educated about how to develop a mature, integrated sexuality as a foundation for celibate chastity.

R2. Members in formation must be encouraged to identify and address challenges to maintaining celibate chastity and healthy intimate relationships.

R3. A Member in formation who sexually abuses a minor will be dismissed.

R4. A Member in formation who is unable to maintain appropriate boundaries with minors, despite guidelines and instruction, cannot be permitted to continue in formation.

Clarification:

C1. It is recognized that vows and promises of celibate chastity do not cause any individual to sexually abuse a minor.

Appendix VII: Sex Abuse Policy

Signature of the receipt at the end of this document is required and needs to be filed in the corresponding student file and copy sent to the Generalate in fulfillment of Praesidium requirement.

MISSIONARY SERVANTS OF THE MOST HOLY TRINITY

GUIDELINES REGARDING SEXUAL MISCONDUCT WITH MINORS

SOME PREMISES UPON WHICH OUR GUIDELINES ARE DEVELOPED

1. Sexual misconduct with minors is a special problem with a profound impact on the lives of those affected. When a member of a religious congregation is involved in such conduct, the integrity of religious life, the priesthood and of the church is damaged. The relationship of trust, essential for ministry, is diminished for all. Therefore, every effort must be made to prevent such behavior from occurring. The congregation, through its administration, has a responsibility to take assertive action in responding to any allegations of such behavior.
2. If a member of the congregation is accused of sexual misconduct with minors, the administration of the congregation must assist the victim and the victim's family, the community, and the confrere involved.
3. The administration of the congregation will demonstrate respect for civil authorities and their proper jurisdiction in these matters. The goal is to promote understanding, pastoral reconciliation and healing. The safety of the children, the well-being of the community, the integrity of the church and the pastoral concern for our confreres are the primary concerns
4. In addition to responding to allegations of such behavior, as a congregation we have a responsibility to do whatever is possible to prevent such occurrences. This would include: careful screening of candidates; assuring that our confreres are provided with educational programs regarding sexuality and the nature and effect of sexual misconduct with minors; importance of our professional boundaries, and the maintaining of adequate records from one administration to subsequent administrations.
5. The administration has the responsibility to assure that the confrere against whom there has been a substantiated allegation of sexual misconduct with a minor is never again assigned to any public ministry.
6. Missionary Servants will provide appropriate support to a Member who disclosed to leadership that he is attracted to minors but has not behaved inappropriately with minors.

7. Missionary Servants will respect each member's rights under civil and Canon Law. In terms of Canon Law: *The rights of Members of Religious Institutes/Societies include, for example: the right to a good reputation (c. 220) and to protect one's privacy (c. 220); right to defend one's rights in an ecclesiastical forum (c. 221§1); right not to be punished with canonical penalties except in accord with the norm of law (c. 221§3); right to canonical counsel (EN, n. 8a); right not to be forced to make a manifestation of conscience (c. 630§5); right to live in a house of the institute (c. 665§1); right to those things necessary to live one's vocation - support (c. 670); and right to hierarchical recourse (c. 1734 ff.).*

INTRODUCTION

The following guidelines and procedures have as their primary goal the welfare, safety and health of children, the good of their families, the well-being of members of the Missionary Servants, the Community itself, and the credibility of Church. An accusation of child abuse involves one in the legal arena, both civil and canonical, with the possibility of criminal charges and/or civil liability suits. Therefore, prudence demands that once an allegation is made, a reasoned, Christian and careful response be given. The following guidelines and procedures recognize that allegations of child abuse may refer to present and past incidents. Incidents of child abuse may likewise exist as a continuous event, spanning years of an individual's childhood. The passage of time does not diminish the psychological effects of the abuse behavior upon the child, nor does it reflect the abuser's psychological healing. Therefore, allegations of child abuse, regardless of the time of their occurrence, require an immediate response as mandated by the following procedures.

The entire process should be conducted in a spirit of fraternal charity and compassion, both for the alleged victim, his or her family, as well as for the Community member against whom an allegation has been made.

These guidelines are applicable to all members of the Missionary Servants of the Most Holy Trinity independent of country of origin or place of ministry.

A list of basic legal definitions and presumptions can be found at the end of this document.

GUIDELINES AND PROCEDURES

I. Initiating an Allegation

- A. The Congregation will offer a pastoral and compassionate response to any person who reports sexual abuse by a member.
- B. The General Custodian or his delegate will function as the Victim Assistance Coordinator. This individual will have expertise in counselling and dealing with victims of sexual abuse, not a member of the Review board and may be a Missionary Servant or a lay person. The

Victim Assistance Coordinator maintains a professional relationship with the alleged victim and/or family and does not act officially as a therapist, attorney, or spiritual director. The Victim Assistance Coordinator's duties include the following:

1. To listen with respect to the alleged victim and/or family;
 2. To offer support and professional resources to the alleged victim, the victim's family and other affected persons, assisting with referrals to therapists and/or support groups;
 3. To explain to the alleged victim the congregation's response to the allegations raised;
 4. To offer to be present during meetings between the alleged victim and/or family and the congregation, including the General Council and/or the Review Board;
 5. To coordinate all communications between the alleged victim and/or family and the congregation, keeping all parties apprised of developments in the case.
- C. Anonymous concerns will be investigated to the extent that is feasible based on known information by the General Custodian. The General Custodian will make deliberate use of the Review Board when a report or an allegation of sexual abuse of a minor has been presented to the Institute. The Major Superior charges the Review Board and vests authority in it to help him assess whether or not a Member has offended. If the member is judged to have offended, the Review Board is also vested with the authority to help the Major Superior assess the viability of a future assignment. In making his decision, the Major Superior takes into consideration the diverse perspectives and viewpoints of the members of the Review Board and attends to their professional advice and recommendations. For the purposes of an internal investigation, the General Custodian will direct the insurance company of the Congregation and its legal counsel to investigate with due diligence. The investigation will generate a written report to the General Custodian.
- D. Any personnel of the Missionary Servants who knows or reasonably suspects that a Missionary Servant or an employee of or volunteer for the Missionary Servants has been involved in sexual misconduct with a minor will report such knowledge to the proper civilian authorities with reference to state and local reporting laws. If the child or his or her parents say that a Missionary Servant, an employee or volunteer has improperly touched a child that is to be construed as knowledge or reasonable suspicion. Nothing in this section should be construed as amounting to a determination by the Missionary Servants that the accused is guilty or not guilty of the allegation.
- E. Besides any applicable State legal or civil reporting requirements, a report of the allegation will be made immediately to the General Custodian or his designee. Allegations should be promptly reported to the General Custodian or his designee by telephone, in writing or by meeting with the General Custodian or his designee.
- F. To the extent possible, the person making the report should provide the General Custodian or his designee with the name of the Missionary Servant who is the subject of the allegation, the name or names of the alleged victim or victims, an accurate description of the alleged

misconduct, the relevant dates, times and circumstances in which the misconduct allegedly occurred and the names, addresses and telephone numbers of other persons who may have knowledge of the alleged misconduct.

- G. When a confrere becomes aware of signs of unhealthy boundaries in another member's relationships with minors, he should (1), in a spirit of fraternity, bring to the member's attention, and (2) communicate this to the General Custodian or his designee. If the confrere is found to have lacked personal or professional boundaries, the General Custodian will establish with the confrere a plan to be followed to respond specifically to the boundary issue. This may include the assignment of a mentor and counselling. There will be a provision in the plan should the confrere refuse to comply or fail to comply that will include intervention and removal from ministry.
- H. The General Custodian or his delegate will be responsible for communicating, as appropriate, with diocese and the bishop, the faith community and the public. The bishop must be informed if a man has offended in his diocese or if he is residing in a community residence within the bishop's diocese.

II. Graduated response. If an allegation is specific, the General Custodian or his designee will respond in graduated stages.

A. Stage One (Allegation)

- 1. The General Custodian or his designee will immediately, within twenty-four (24) hours or as soon thereafter as possible:
 - a. Comply with all civil reporting requirements related to sexual misconduct with a minor for the jurisdiction where the abuse allegedly occurred.
 - b. Consult with a designated professional who is knowledgeable about child abuse cases in an effort to prepare for an intervention with the accused and consult with legal counsel, who will represent the interests of the Missionary Servants, i.e., the institute itself.
 - c. Give notification of the allegation to the Missionary Servants' insurers in accordance with the terms of applicable insurance policies.
 - d. Meet with the accused member and explain the allegations, without soliciting any form of admission. The General Custodian or his designee will impress upon the accused the gravity of the situation and explain the procedures to be followed. The General Custodian or his designee will recommend an attorney and inform the accused that he need not discuss the matter with anyone until he has spoken to his attorney. The General Custodian or his designee should reassure the accused that the Missionary Servants will support him legally and financially, without regard to his guilt or innocence, in any legal proceeding, so long as the accused follows these Guidelines. The General Custodian or his designee will inform the accused that he

should undergo a diagnostic evaluation by a mental health professional and that a specific allegation of abuse has been reported to the authorities. The General Custodian or his designee, at his discretion where he is persuaded by the circumstances that the alleged abuse occurred, may bypass this initial diagnostic evaluation and proceed immediately to ask the accused to go to an evaluation center for purposes of a thorough evaluation of the accused's mental and physical condition, as required in Stage Two, n. 1. Appropriate attention is given to the member's rights under civil and Canon Law as mentioned above. Premises, no. 7.

- e. A trained individual will be identified who will conduct the investigation and produce a written report.
2. The General Custodian or his designee will relieve the accused Missionary Servant of his ministerial duties and place the accused Missionary Servant on temporary administrative leave. This leave does not imply either the guilt or the innocence of the Missionary Servant under investigation. The accused will have no access to minors during the pendency of a full investigation.
3. In the case of a Missionary Servant employed by an outside agency, the General Custodian or his designee will seek counsel of the attorney for the Institute to determine whether or not to notify, given that accusation has not been substantiated at this stage, the outside employer of the accused Missionary Servant. If the man has any access to minors, he will be removed immediately pending the substantiation of the accusation.
4. Any media contact or inquiries regarding an alleged incident of child abuse should be directed to the General Custodian or his designee.
5. Where the allegation comes from the lay community, the General Custodian or his designee should be willing to meet with the alleged victim and family for purposes of discussing the allegations and outlining the procedures addressed herein.

B. Stage Two (Evaluation)

1. If the preliminary diagnostic evaluation by the mental health professional results in a recommendation of further evaluation and/or treatment, the General Custodian or his designee will plan for the accused Missionary Servant to be sent immediately to an evaluation center for purposes of a thorough evaluation of the accused mental and psychological condition.
2. The General Custodian or his designee will develop a working relationship with the evaluation center. Such relationship will include procedures by which the General Custodian may monitor the accused Missionary Servant's recovery while maintaining respect for the confidential relationship between the accused Missionary Servant and his psychological counsellor.

3. The accused Missionary Servant will be relieved of his assignment, indefinitely, until the matter is resolved.
4. The General Custodian or his designee will place the accused Missionary Servant on administrative leave, per the norm of Can. 1722. If the accused Missionary Servant is ordained, then he may not publicly celebrate Mass, administer the sacraments, preach or engage in any form of public ministry until the matter is resolved. Per Can. 1722, the General Custodian or his designee may impose other restrictions on the accused if he judges the case warrants them. If the accused Missionary Servant believes that the procedures are not warranted, he may ask the General Custodian or his designee to reassess the matter, and if that fails, he may have recourse to higher authority, e.g., the Congregation of Institutes of the Consecrated Life in Rome.
5. The civil or law enforcement agencies will not be expected to grant any preferential treatment to the Missionary Servants. The Missionary Servants, with the assistance of legal counsel, will cooperate in any investigation duly mandated by law.
6. The General Custodian or his designee should offer the opportunity for psychological help and other needed assistance to the alleged victim and to his or her family, at the expense of the Missionary Servants.

C. Stage Three (Substantiated allegation)

If an allegation of child abuse made against a Missionary Servant is substantiated, either by a voluntary admission of guilt or a conviction in a court of law, the following consequences will follow:

- 1 The Missionary Servant will be removed permanently from any public ministry.
- 2 The Missionary Servant will be encouraged to enter an extended residential therapeutic program for assessment and counselling. Opportunity for continued therapy will be offered, regardless of what course of action ensues.
- 3 If the confrere is in temporary vows, he will not be permitted to renew those vows.
- 4 The confrere will be assigned to a residence where he will be provided with support, be closely supervised and limited in his travel and general activities. If the confrere is considered a “high risk”, the residence will be visited by an outside auditor at least annually, to ensure consistent implementation of the safety plan.
- 5 The Congregation will develop a safety plan and appoint a supervisor. The supervisor is provided with all adequate information to fulfill their duties.
- 6 The local Ordinary will be informed that the allegation has been substantiated.

- 7 If the confrere requests it, appropriate steps shall be taken for dispensation from vows/laicization.
- 8 Dispensation from vows/laicization may be sought by the General Custodian, following proper canonical procedure.
- 9 Given a substantiated allegation or admission of guilt, the Congregation will inform the leadership of any organization in which the Member is employed.

III. Allegation not Substantiated. To the fullest extent possible, the Institute will document every effort to restore the good reputation of a Member who has been falsely accused of the sexual abuse of a minor.

IV. The Missionary Servant Who Is Accused of Child Abuse

- A. If a situation arises where a Missionary Servant is concerned about being falsely accused, the General Custodian or his designate is to be contacted.
- B. When there is an allegation, the accused Missionary Servant cannot be obliged to incriminate himself. He should be careful in his communications, even with his fellow religious and superiors. In civil law and criminal law, communications between a religious and his religious superior are not privileged from disclosure to the authorities or potential litigants. The only well recognized exception to this rule of disclosure is the confessional privilege, sometimes called the priest-penitent privilege. However, this has been narrowly interpreted by the courts. Therefore, it is important for the accused person that he assume that his communications to any member of the religious community (except his priestly confessor) regarding the alleged abuse will be revealed via subpoena and questioning of those in whom he has confided.
- C. The accused Missionary Servant should also understand that any substantiated accusation of child abuse will have to be reported to the authorities, as required by state law, by the religious superior. Many states now require that certain professionals, who are informed of possible child abuse or who have reason to suspect such abuse, must report what they know to the authorities, usually within twenty-four hours. Failure to report an incident or allegation is itself a crime under the reporting statutes. Once a report is made, the authorities are obliged to begin an investigation, which will necessarily involve the accused Missionary Servant, the General Custodian or his designee, lawyers and mental health professionals. Therefore, as soon as an allegation is made, the General Custodian or his designee should be notified so that the General Custodian or his designee can immediately consult legal counsel and authorities and proceed as prescribed in Section II. Cf. Review Board.
- D. Notwithstanding the above, the priest-penitent relationship must remain inviolate and nothing discussed should be construed to impair the sanctity and secrecy of that forum so

long as the communications took place within the confessional context.

- E. If accused, a Missionary Servant should immediately telephone the General Custodian or his designee and inform him of two things:

“I have been accused of child abuse.” “I need legal representation.”

V. Accusation Reported to a Missionary Servant

If an allegation of child abuse is reported to a Missionary Servant about another Missionary Servant, he is not to investigate the matter himself. He is to contact immediately the General Custodian or his designee. The procedures outlined in II, above, will be initiated.

VI. Inappropriate Behavior, Lack of Professional Boundaries

If there is evidence of obviously inappropriate behavior or lack of professional boundaries involving a person who is a minor (someone not eighteen years of age) an intervention will take place seeking behavioral change by the member through an appropriate plan, regular meeting with a supervisor designated by the Major Superior and local custodian.

VII. Prudential Considerations

Appropriate affection between Members and minors constitutes a positive part of Church life and ministry. The following forms of affection are regarded as appropriate examples for Members in ministry roles with minors:

- + Hugs.
- + Pats on the shoulder or back.
- + Hand-shakes.
- + “High-fives” and hand slapping.
- + Verbal praise.
- + Touching hands, faces, shoulders and arms of minors.
- + Arms around shoulders.
- + Holding hands while walking with small children.
- + Sitting beside small children.
- + Kneeling or bending down for hugs with small children.
- + Holding hands during prayer.
- + Pats on the head when culturally appropriate. (For example, this gesture should typically be avoided in some Asian communities)

Given the fact that our society today is very much aware of child abuse issues and since the possibility of unjust accusations is also quite real, Missionary Servants are expected to be

prudent in their association with minors.

- + Except for family members, no one, especially a minor, is to reside in our Cenacles or other residences without the permission of the General Custodian or his designee.
- + Minors, even family members of a Missionary Servant, are not permitted in those areas in our residences which are reserved for the Missionary Servants, the private living and sleeping quarters.
- + Minors may never be offered alcoholic beverage, tobacco, drugs or anything else that is prohibited by law.
- + Planned, ongoing meetings with a minor will not take place without the consent of a parent or guardian.
- + Sexual touch or other intrusive contact (i.e., tickling, wrestling, or other physical contact) that causes uneasiness or discomfort in the one touched is prohibited.
- + Engaging in sexual contact with minor is explicitly forbidden. For the purposes of this policy, sexual contact is defined as vaginal intercourse, anal or oral intercourse, the touching of an erogenous zone of another (including but not limited to the thighs, genitals, buttocks, pubic region or chest) for the purpose of sexually arousing or gratifying either person.
- + If a minor initiates appropriate legitimate physical contact, a limited response is proper. In all cases, it must be respectful.
- + Significant gifts or special privileges or opportunities are not to be given to a specific minor. A parent's or guardian's permission must be granted before any gift is given to a child. Special privileges, opportunities, or advantages that set a child or children apart from his/her peers must have objective measurable criteria set by apostolate leadership for child's inclusion in the activity.
- + Inappropriate conversation, vocabulary, recordings, films, or games are not to be engaged in or used with minors. Showing sexually explicit or pornographic material to a minor is illegal.
- + Physical discipline of a child is prohibited.
- + If one becomes aware of an inappropriate personal or physical attraction between himself and a young person, clear professional boundaries are to be maintained, and the General Custodian should be consulted.

VIII. Some Basic Legal Definitions and Presumptions

Although the statutes vary from state to state, a practical understanding of the law includes the following notions:

1. "Child" is any person under eighteen (18) years of age.
2. "Abuse" minimally includes any and all of the following:
 - a. physical or mental injury inflicted on a child;
 - b. sexual contact or intercourse;
 - c. sexual exploitation of a child.
3. "Physical injury" is that which is inflicted on a child by other than accidental means. It

includes, but is not limited to, lacerations, fractured bones, internal injuries, severe or frequent bruising or great bodily harm as defined in law.

4. "Sexual Contact" means any intentional touching of the intimate parts of the body (genital area, groin, inner thigh, buttock or breast) clothed or unclothed, of a person, if that intentional touching can be reasonably construed as being for the purposes of either sexual arousal or sexual gratification of either party.

5. "Sexual intercourse" means any penetration of or intrusion, however slight, into the body (oral, anal, genital) of another, whether of the same or the opposite sex.

6. "Consent" refers to words or overt actions by a person who is competent to give his/her permission to an incident of sexual contact. It should be noted that although someone may be willing to engage in a sexual act, it does not follow that he/she legally consents. Many state laws define who is and who is not legally capable of consenting to sexual contact. Some, by reason of age or other conditions, are deemed legally incapable of giving their consent to sexual contact, under any circumstances. Sexual contact with minors is a crime.

IX. Considerations for a Pastoral Response

- + It is typically better to use a different person for pastoral response than you use for investigations.
- + Take time to put yourself in the place of the individual and understand how he or she has felt and continues to feel.
- + If you do not feel patient and compassionate toward individuals who have may have experienced abuse, someone else may be better equipped to serve in the pastoral response role.
- + It is essential to spend time listening to a survivor's story of abuse.
- + It is important to realize that these situations are complicated, painful, and not likely to be resolved quickly.
- + The reality is that responding to the needs of survivors of sexual abuse is often a long-term process.
- + Survivors of sexual abuse are often suspicious and untrusting.
- + Many survivors of sexual abuse show a range of strong emotions over a short period of time or over a long period of time.
- + Most survivors want validation that the incidents occurred.
- + It is not uncommon for survivors to want support but to not always accept it.
- + It is not productive or helpful to defend, justify, excuse, or argue.
- + Avoid asking the survivor why he or she did not stop the perpetrator or come forward sooner. These questions can make an individual feel guilty, or responsible, or blamed.
- + Ask the person about his or her personal goals and what he or she believes would help with the healing process.
- + If the person has made a specific request, ask how that would help.

- + Be sure to do what you say you are going to do as quickly as possible.
- + Be sure not to make promises you can't keep and to keep the promises you make.
- + If they would like, stay in contact with survivors over time.

X. Employees

In terms of Employees and Volunteers of the Missionary Servants, the following are the guidelines of the Institute:

If an Employee or Volunteer of the Missionary Servants is accused of abuse of minors, the Missionary Servant in authority must proceed in accord with established local law and the mandated responsibility to report the abuse to the competent authorities and cooperate fully with them. The employee or volunteer will be relieved of duties or assignment, temporarily and with benefit of salary, until the accusation is resolved. The Missionary Servants will manifest charity and Christian solicitude towards the accused and towards the alleged victim and family. Nevertheless, Missionary Servants will not accept any responsibility in this matter unless the General Custodian or his delegate make that determination after legal counsel.

NOTE: THESE GUIDELINES DO NOT CONSTITUTE OR SHOULD BE INTERPRETED AS THE CREATION OF AN EMPLOYEE RELATIONSHIP BETWEEN MISSIONARY SERVANTS AND OTHERS. IT IS RECOGNIZED THAT MEMBERS OF THE MISSIONARY SERVANTS ARE NOT NECESSARILY CONSIDERED EMPLOYEES OF THE INSTITUTE.

XI. Review of Individual Cases, Policy and Guidelines

- A. The General Custodian or his delegate will meet at least once each year with each member who is in a position of trust with minors and will communicate at least once each year with the organizations that employ members who are in positions of trust with minors. Documentation of such actions will be maintained.
- B. After each General Cenacle, the newly elected General Custodian and his Council should review the Policy (shorter statement) and Guidelines (this document), along with any pending cases involving sexual misconduct with minors.
- C. The General Custodian will be attentive to the recommendation of the independent Review Board as established by the CMSM. The role of the Review Board is to provide advice and consultation to the Major Superior with respect to fulfillment of Accreditation Standards, the *Charter* and *Essential Norms*, and other community standards for prevention and response to incidents and allegations of sexual abuse of minors.
- D. Among the tasks of the Review Board will be the review of each Safety Plan at least annually and offer recommendations to the Major Superior regarding appropriate adjustments

E. The Review Board will assist in this review and also be available for consultation at any stage of this process. The Review Board will consist of five to seven members and appointed by him after consultation with the General Council.

- 1 The members of this Review Board should include representation from the Congregation, persons with expertise in appropriate social, legal, law enforcement and protective professions. Some parents should be included.
- 2 This board will serve concurrently with the general administration that appoints them.

Sex Abuse Policy

I hereby attest to having received and having diligently studied the Sex Abuse Policy of the Missionary Servants of the Most Holy Trinity.

Name:

Signature:

Date:

Appendix VIII. Internet and Social Network Policy

Signature of the receipt at the end of this document is required and needs to be filed in the corresponding student file and copy sent to the Generalate in fulfillment of Praesidium requirement.

The Thirteenth General Cenacle affirmed the importance of modern means of communication. The recommendation made is summarized by the following statement: “The use of modern communications should be encouraged as a significant element of all our evangelization and missionary efforts” (Acts XIII n.13). The Internet is one such means of communication that we are encouraged to use efficiently and appropriately.

The Internet allows us instant global communication and immense possibilities for the betterment of the individual and Congregation. However, the risk of harmful and inappropriate use is also present. For some, the Internet virtual reality becomes more real than fraternal surroundings, and Internet addiction has become a very serious ailment. The availability of cybersex not only poses a definite challenge to the task of human development but is a threat to fundamental Christian norms. This is especially true when the Internet is used to harm a child’s welfare.

It is inappropriate to use the Internet to post, download, upload, store, or pass on material, remarks, proposals or comments that contain or relate to pornography. Distributing, downloading, or intentionally viewing child pornography of any kind is sexual abuse of a minor in both civil and canon law. Any individual who has engaged in these behaviors must have an individualized Safety Plan.

Contact with minors through the Internet requires care for boundary limitations and caution regarding inappropriate behavior as listed above under section VI (Prudential Considerations) of these Guidelines.

The Institute therefore reserves the right to monitor site access and examine computer files and usage information when deemed necessary. If there is evidence of inappropriate behavior involving Internet use, measures will be taken regarding a Missionary Servant, including appropriate therapeutic and/or canonical measures. In the case of child pornography, civil law requires reporting to the proper authorities, with the probable consequence of persecution and imprisonment.

Each formation program of the Institute will provide information and awareness training regarding appropriate use of the Internet and structure appropriate policies which may include

technical monitoring of computer use under the supervision of the VDC directors.

Each of our mission sites will develop appropriate Internet policies regarding Internet use in such public access computers as schools and tutoring centers, following the guidelines of this policy as well as the Children's Internet Protection Act and other norms of international law.

Policy regarding social networking sites.

To protect youth from abuse and members from false allegations, Missionary Servants have established the following guidelines should the mission site find it pastorally necessary to communicate with youth through social media:

1. A public social network page be established for the mission or cenacle. Communication can then take place through this public page instead of the individual profiles. This allows network administrators to monitor communication and ensures that private (and possibly inappropriate) conversations with youth do not take place.
2. The following Code of Conduct will be followed:
 - a. Comments that are, or could be construed by any observer, harsh, coercive, threatening, intimidating, shaming, derogatory, demeaning or humiliating are prohibited.
 - b. Sexually oriented conversations or discussions about sexual activities are prohibited.
 - c. Private messages between members and youth are prohibited.
 - d. Posting of inappropriate pictures or inappropriate comments on pictures are prohibited.
 - e. The above code of conduct will be provided to youth and their parents.

Internet and Social Network Policy

I hereby attest to having received and having diligently studied the Internet and Social Network Policy of the Missionary Servants of the Most Holy Trinity.

Name:

Signature:

Date:

Appendix IX: Review of Internet and Social Network

Format for Review of Internet and Social Network

Name of the Prospect: _____

As attested by my signature, the following represent all portals to social networks, blog sites and internet sites associated to accounts that I control. I grant permission to the Vocation Director to review the same with all due diligence deemed necessary to fulfill the requirement of the Missionary Servants as accredited in the protection of minors and vulnerable persons.

- 1.
- 2.
- 3.
- 4.
- 5.

Signature and Date: _____

Name of the Vocation Promotion Director: _____

As attested by my signature, after due diligence in reviewing each of the above mentioned portals, blog sites and web sites presented by the Prospect: _____

No evidence was found of a violation or risk of violation of the norms established by the Missionary Servants in its care for the wellbeing of minors and vulnerable persons.

In the Trinity

Signature and Date: _____

Appendix X: Ethical Relation with Adults

Signature of the receipt at the end of this document is required and needs to be filed in the corresponding student file and copy sent to the Generalate in fulfillment of Praesidium requirement.

Missionary Servants of the Most Holy Trinity

Declaration on the Preservation of Ethical Relations in Ministry with Adults

Revised and Edited by Legal Counsel on January 28, 2016

PREFACE

The profession of vows binds Missionary Servants of the Most Holy Trinity together as a community for the sake of our apostolic mission. We freely vow chastity, poverty and obedience as a personal response to the call of God through the grace of the Holy Spirit. The vowed life helps us live a true fraternity in which we express a generous love of one another in community (Constitution # 23-24). Living together as brothers makes us more effective missionaries and provides us with the support we need for a faithful living of the vows. The vow of chastity, in particular, “should liberate our hearts to love and to be loved by all those given us in community and ministry. Our chastity should find expression in a warm and selfless love of others.” (Const. #25). From the earliest stage of formation and throughout our lives in ministry, Missionary Servants endeavor to develop those practices and attitudes which tend to encourage the proper living out of the vows and, in particular, embracing a healthy celibacy.

The faithful living of the vowed life is only possible when it is based upon a deep reliance on the grace of God. Thus, a personal commitment to the spiritual life is necessary in our lives as religious. The Constitution proposes the essential elements of our Cenacle’s spirituality: steadfast common prayer in our Cenacles, especially the Liturgy of the Hours; responsiveness to the needs of others including, but not limited to, our confreres; reflection on the providence of everyday life in the light of the gospels; frequent use of the Scriptures in prayer; daily celebration of the Eucharist; frequent use of the Sacrament of Penance; personal prayer, meditation, and spiritual reading; an annual retreat; personal spiritual direction; devotion to Mary and the saints; striving to make the virtues, practices and devotions of the Missionary Cenacle an integral part of our lives (Constitution #11-22).

In addition, General Cenacle XIV suggested that our personal conversion can be encouraged by: The Cenacle practice of house council, scheduled on a monthly basis, where we gather together and offer mutual support for our vowed life and mission, regional days of prayer and faith sharing, establishing an “intimate spiritual relationship with another ST confrere or other trusted religious with whom he can share his personal spiritual journey” (Acts XIV, p 4-5). Besides these spiritual tools, many of the confreres have found it helpful to make use of psychological counseling to monitor their emotional health. The Constitution sums up the personal commitment to the vow of

chastity in this way: “The celibate life demands a noble heart and the willingness to embrace the asceticism it may entail. Indeed, when it is accepted for the love of God, the sacrifices it can bring with it are themselves a witness to the cross so willingly accepted by Christ for the love of mankind” (Constitution #25.1).

The same article of the Constitution continues: “When lived in the brotherhood of community, celibacy is assisted and strengthened by the companionship of like-minded men.” Community life assists and strengthens our personal commitment. Our life together can provide the spiritual, emotional and psychological support that makes the vowed life holy and wholesome. Besides that, brothers in community are able to point out the very human tendency we all share toward denial, self-deception and rationalization. Our confreres may notice if we begin to keep secrets and manufacture lies. Such pastoral misconduct might be warning signs that a confrere is slackening in his commitment to the vowed life. Confreres who witness such behavior are urged to practice fraternal correction as a way of supporting a brother’s commitment to the vows. The pattern for such correction is modeled on the words of Jesus in Matthew 17:15-18. First, a one-on-one sharing of the behavior one is observing. If that is not effective, the local cenacle should meet with the brother as a sign of a common concern. If the brother is still resistant, the General Council should be informed so that the congregation might provide a remedy to support the confrere in living out his vows. Missionary Servants owe it to each other to do all that we can to support our brothers with prudence, understanding and fraternal love.

Experience teaches us that even with personal commitment and community support, living celibacy is not easy. After all, feeling sexual attraction and falling in love are normal parts of human existence. At times, human weakness can overwhelm even the most heart-felt desire to remain faithful to one’s vows. Sin is part of the human condition. We have all been touched by the mercy and compassion of God. We try in all things to mirror the grace and forgiveness of God toward an erring brother. A spirit of reconciliation and kindness should characterize all of our interactions.

With that said, the public nature of the life of a Missionary Servant of the Most Holy Trinity requires something more than a personal reconciliation and forgiveness when an offense against the vow of chastity occurs. In all ministerial relationships involving a priest or brother there is an inherent power differential. The position that a religious hold in the Church and in society means that every pastoral relationship has a built-in degree of inequality. The priest or brother consciously or unconsciously holds a position of power. Therefore, a sexual relationship between a religious and a person receiving pastoral service cannot be supposed to involve “consenting adults.” The person receiving pastoral service is always in a weaker, more vulnerable position. When people with similar power differentials (for example; doctors, counselors, therapists) become sexually involved with a patient or client, they are in serious jeopardy of losing their license to practice their profession. Religious must be held to an even higher standard.

The policies promulgated here are an effort to balance the necessary support of a Missionary Servant living the vowed life, the willingness to offer forgiveness and reconciliation to an erring brother, and accountability for actions which violate the integrity of the pastoral relationship. This policy is for all Missionary Servants from whatever culture or country. Please note that this policy is separate from our policy regarding sexual pastoral misconduct with minors. Sexual conduct with minors is, of its very nature, a crime and requires a response ensuring, as far as we are able, that no child is ever abused. This policy involving the ethical relations in ministry to adults seeks to take into account human, spiritual, community and pastoral concerns. Implementing this policy will help us to live up to the call of our Constitution: "By our lives as Missionary Servants we seek first to glorify the Triune God." (Constitution #3).

SECTION 1: INTRODUCTION

I. Presentation

This document expresses the official policy of the Missionary Servants of the Most Holy Trinity in the matter of healthy relations in ministry with adults. It presents a clear protocol so as to maintain healthy boundaries between the confreres and the adults under their care. It also contains indicators of healthy, and not so healthy, behavior as well as the norms for responding to accusations of abuse by a confrere.

II. The Mission of the Missionary Servants of the Most Holy Trinity

In order to promote the kingdom of God we are committed to:

- A. Share the charism and the spirituality of the Missionary Cenacle;
- B. Form apostles for the preservation of the faith in the service of the poor and abandoned;
- C. Assure the ongoing health and welfare of the Congregation for the service of God's People.

III. The Vision of the Missionary Servants of the Most Holy Trinity

Our vocation is to develop a missionary spirit in the laity in those areas and among those people who are spiritually neglected and abandoned, especially the poor. Our mission necessarily calls us to live in solidarity with the people we serve and to accompany them in recognizing and responding to their particular call as missionary disciples of Jesus. Often these sisters and brothers from various cultures and styles of life are marginalized, "victims of injustice" (Constitution #6), abused and taken advantage of by individuals and societal forces. We consider "action on behalf of justice" an "integral part announcing the coming of the kingdom" (#6). It is an essential part of our apostolic mission to do everything possible to protect the dignity of these sisters and brothers and actively

combat anything that would diminish or impoverish it. To help us keep this commitment, the following policies have been formulated for the protection of those adults under our care.

IV. Definitions of Words and Phrases Used in This Document

- "Confrere" means a member of the Congregation of Missionary Servants who has made temporary or perpetual vows, and includes, unless the context clearly indicates to the contrary, novices, postulants, and aspirants. Where the context so indicates, a reference to a "Confrere" shall be interpreted to include an MS-Agent.
- "MS-agent" means a person other than confreres who live or work under the supervision, direction, or control of a confrere and who participate, with or without compensation, in the provision of goods or services to members of the parish or pastoral center.
- "Accused" means the Confrere or MS-agent who is suspected of improper behavior.
- Except where the context indicates to the contrary, the "Accuser" means the purported victim of the improper behavior.
- The "Complaint" means the allegation of wrongdoing against the accused.
- "General Council" or "Council" means the body of advisors to General Custodian of the Missionary Servants of the Most Holy Trinity.
- "General Custodian" means the duly elected leader of the Missionary Servants of the Most Holy Trinity, or his duly authorized representative.
- Any reference to an action or determination by the "General Custodian" and/or his "Council" shall be taken to mean the action and/or determination of the General Custodian as advised and informed by his Council.
- "Adult" means any person 18 years of chronological age or more, and, for the purpose of this policy, it also includes vulnerable adults with physical or mental incapacity.
- "Vulnerable adult" means any adult person who because of physical, mental, or emotional infirmity or weakness is exposed to a greater than normal risk of being taken advantage of, or harmed, by another.
- "Pastoral relationship" or "ministry" means:
 - ☐ A relationship between a confrere and any person to whom the confrere offers ecclesiastical or priestly services, which may include, but is not to be limited to, counseling, direction, or guidance of a spiritual or religious nature.

- ☐ The receipt of confidential or privileged information from another person in the course of priestly counseling, spiritual direction, or religious guidance;
 - ☐ A relationship that is established between a confrere who is formally in charge of a parish or a pastoral center and the people who are members of the parish or of the pastoral center or who receive goods and/or services from the parish and/or the center;
 - ☐ Or the circumstances relating to work, services, goods, or assistance provided under the auspices of a religious organization, acting under the supervision, direction, or control of one or more of its confreres.
- “Spiritual accompaniment” means help given by one person to another which enables that person to be more attentive to the promptings of God in the individual’s life. "Sexual contact means touching, or causing another person to touch, any erogenous zone (including, but not limited to, vagina, thigh, genitals, anus, mouth, buttocks, pubic area, breast, or other sensitive body part) of themselves or another, for the purpose of sexually stimulating any person.
 - "Sexual exploitation" or “sexual abuse” means circumstances in which a confrere has sexual contact with anyone with whom he has, or has had, a pastoral relationship, regardless of who initiates such sexual contact. This Declaration deals with issues involving ethical pastoral relations with adults; the special problems of pastoral relations with minors are addressed in other communiqués.
 - “Victim,” “alleged victim,” “accuser,” or words of similar import mean a person whose interests are believed to be threatened or harmed by virtue of sexual exploitation, non-observance of pastoral limits, or actual or potential conflict of interest on the part of a confrere or MS-agent in the context of pastoral relations. This Declaration deals with issues involving adult victims; the special problems associated with minor victims are addressed in other communiqués.
 - “Pastoral limits” means the established professional principles, policies, norms, and rules governing the ethical boundaries of appropriate pastoral relationships, including those set forth in Section 2, below with respect to pastoral relations. This Declaration deals with issues involving professional limits in connection with relations with adults; the special problems of pastoral limits in connection with pastoral relations with minors are addressed in other communiqués.
 - “Conflict of interest” means a situation in which a confrere or MS-agent allows or may be tempted to allow his or her personal interests or the interests of another to interfere with his performance of duties owed to another in the context of pastoral relations; it includes circumstances where, contrary to his obligation to act in the best interests of another, the

confrere or MS-agent exploits the relationship for the benefit of himself or a third party. The interests involved may include, but are not limited to, religious, sexual, political, financial, corporeal, or commercial interests. This Declaration deals with conflicts of interest involving pastoral relations with adults; the special problems associated with conflicts of interest involving pastoral relations with minors are addressed in other communiqués.

- “Pastoral misconduct” means sexual exploitation, non-observance of pastoral limits, and/or disregard for potential or actual conflict of interest in the context of pastoral activities. This Declaration deals with issues involving pastoral misconduct involving adults; the special problems of pastoral misconduct involving minors is addressed in other communiqués.
- “Confidentiality of Confession” is a reference to Canon 983 of Church Law that states: The sacramental seal is inviolable; therefore, it is a crime for a confessor in any way to betray a penitent by word or in any other manner for any reason. The strong wording means that the secrecy concerning the penitent and his or her confession of sins is considered to be total.

SECTION 2: PASTORAL MISCONDUCT IN MINISTRY

1. Pastoral Limits

- A. A confrere must never engage in any sexual contact with anyone, especially those with whom he has, or has had, a pastoral relationship. This includes, but is not limited to, consensual contact, forced physical contact or explicit sexual conversations not directly related to issues of pastoral ministry or spiritual accompaniment. A confrere not only has to avoid sexual contact because of his vow of chastity, but also, he is obliged in justice to avoid it in his ministry since he is recognized as a trusted person discharging his ministry in the name of the Church.
- B. A confrere assumes personal responsibility for establishing and maintaining clear and appropriate pastoral limits in every pastoral relationship. However, it is hoped that, "when lived in the brotherhood of community, celibacy is assisted and strengthened by the companionship of like-minded men" (Constitution #25, 1).
- C. Every physical contact in a pastoral relationship ought to be respectful and consistent with the intention of establishing a proper, safe, healthy and comfortable atmosphere.
- D. Ministry ought to be conducted at appropriate times and places, in a professional

atmosphere, and never at times and places, or under circumstances, that reasonably might tend to alarm, confuse, or harm the recipients of those services.

- E. Since our ministry often involves visiting people in their homes for pastoral or missionary purposes (e.g., a visit to the sick), great prudence must be exercised relative to the circumstances of such visits. The confrere should seek to ensure, whenever feasible, that other people are present during such ministry.
- F. The traditions of the Congregation from the beginning always have encouraged a spirit of "Christian hospitality to others in the places set aside for that purpose in our missionary cenacles" (Constitutions #30, 4). While a spirit of hospitality, cordiality, and openness is to be encouraged, reasonable care must always be taken to avoid circumstances in which a member of the community, a guest, a visitor, or some other person suffers harm due to pastoral misconduct.
- G. The local Custodian of the Cenacle may authorize guests or visitors (i.e., adult persons who are neither confreres nor confreres' relatives) to enter the cenacle and share its hospitality (including brief stay-overs), but no stays of extended or indefinite duration should be permitted without the authorization from the Custodian General.
- H. A confrere is responsible for exercising reasonable oversight, supervision, and control over the behavior of MS-agents living or working under his supervision, and for taking reasonable measures to protect other members of the community or third parties from pastoral misconduct as a result of the behavior of a confrere or MS-agent.

II. Supervision

- A. Every confrere should have a spiritual director with whom he meets on a regular basis. This is especially true of confreres who, themselves, are giving spiritual direction to others.
- B. Every confrere should communicate clearly and regularly with his local custodian or mission director regarding his particular missionary work as well as any difficulties or challenges he has encountered in his relationship(s) with individuals involved in the mission work.
- C. Similarly, a confrere assumes responsibility for requesting help or pastoral counsel from a person who is spiritually wise in the exercise of his mission. This is especially true when the confrere runs the risk of acting irresponsibly because of a sexual or romantic attraction with an individual with whom he is in contact in his pastoral work.
- D. A confrere who provides counseling sessions and/or personal spiritual direction to individuals should keep a record of the schedules and the place(s) of meetings for each person he counsels as well as notes regarding each session.

III. Confidentiality

- A. Confidential information given to a confrere during counseling or spiritual accompaniment is to be kept in confidence, except when disclosure is required by law. If in the judgment of the confrere, there is clear and imminent danger to a third person, the confrere shall reveal only so much of the confidential information as may be reasonably necessary to protect the safety and well-being of such person(s).
- B. A confrere ought to discuss the nature of the confidentiality and its limitations with each person he sees for psychological and/or pastoral counseling. According to the Canon Law of the Church, all communications received during the celebration of the Sacrament of Penance are understood to be strictly confidential and can never be revealed by the confessor under any circumstance.
- C. Information obtained from pastoral interviews may be used in teaching or other public presentations, so long as reasonable measures are taken to fully guard the identity and the confidentiality of the individual(s) who provided the information.
- D. Notwithstanding any other provision in this policy statement, information received in the course of the sacrament of confession may not be used for any purpose whatsoever.

IV. Conflicts of Interest

- A. An unacceptable conflict of interest exists when a confrere is subject to circumstances which may reasonably be expected to tempt the confrere or MS-agent to favor his own personal, religious, sexual, political, financial, or commercial interests above the interests of someone to whom he owes loyalty and service.
- B. A confrere ought to avoid situations that might present a conflict of interests between a counselor and the person who receives the counseling. Even the appearance of a conflict of interests can bring into question the integrity and professional behavior of those involved.
- C. If a conflict of interest exists or arises, the confrere should inform all those whose interests may be involved or affected and take any measures reasonably necessary and appropriate to ensure the safety and well-being of others, including but not limited to, the person seeking or receiving pastoral services.
- D. A confrere should establish clear and appropriate limits with anyone with whom he has a professional, pastoral, spiritual, or social relationship.
- E. A confrere or MS-agent should not go beyond his competence in the matter of psychological counseling or spiritual accompaniment. The temptation exists in the effort to be pastorally caring to attempt to respond to psychological or spiritual dilemmas for

which he has received no training or experience. He should refer the case to other appropriate professionals.

V. Responsibilities of Confreres in Ministry

A. The responsibilities of each confrere include the obligation to:

1. Be aware of and respect the power of the ministerial function.
2. Give careful and respectful attention and consideration to the observations and critiques of others
3. Develop resources to safeguard his own spiritual and emotional needs.
4. Take care of one's own health and avoid the deterioration of good judgment brought on by sleep deprivation, nutritional deficiencies, drugs or alcohol, and excessive work.
5. Never engage in sexual contact with those served in the ministry, regardless of who initiates the contact.
6. Never use blasphemy or other obscenities in the presence of others.
7. Never talk graphically of sexual activity or permit others to do so in his presence, unless required by the nature of the pastoral circumstances to provide emotional, psychological, or spiritual counseling.
8. Never possess, view, or display any pornographic material in any form.
9. Always enforce appropriate professional boundaries with those served in the ministry.
10. Never use one's pastoral role to degrade, embarrass, hurt, or humiliate another.
11. Communicate to the local custodian or another person in leadership when he senses an undue preoccupation in himself or another confrere regarding another confrere or third party.
12. Be aware of problem-indicators or “triggers” associated with sexual or illicit behavior or relationships.
13. Exercise reasonable oversight, supervision, and control over the behavior of MS-agents living or working under his supervision.
14. Take reasonable measures to protect third parties from sexual exploitation, non-observance of pastoral limits, and disregard for actual or potential conflicts of interest as a result of the behavior of any person over whom you exercise direction, supervision,

or control.

B. Some problem indicators might include:

1. Spending inordinate amounts of time on personal hygiene - combing hair, etc. or wearing special clothes - when you know you will be with a certain individual.
2. Repeatedly seeking out a certain individual.
3. Finding frequent excuses to be alone with a particular person.
4. Sharing private information about others with a certain individual.
5. Acting secretly in connection with personal contacts or relations with a particular person (e.g., clandestine meetings, covert arrangements, furtive contacts, surreptitious activities).
6. Exchanging special gifts with a certain individual.
7. Neglecting community obligations, shirking public activities, or ignoring responsibilities in order to spend time with a particular individual.
8. Engaging in wishful thinking regarding ones' activities or relationship with a particular person.
9. Entertaining sexual fantasies or reveries about a certain individual.

C. Confreres also have the responsibility to care for one another in community and to be vigilant for any behavior that might threaten the health and welfare of the confrere, those he serves in the apostolate, or others. Such behaviors should be promptly brought to the attention of the brother in question with respect and care, either by an individual confrere who has noted the behavior or by the local custodian. If the behavior continues and appears to represent a continuing threat to the safety and well-being of others, then the General Custodian should be informed and should intervene to prevent harm to the confrere or others. "Our vows should help us express a more generous love of one another in community; community life, in turn, should contribute to the faithful living of the vows" (Constitution, #24).

SECTION 3: SEXUAL EXPLOITATION, PASTORAL LIMITS, AND CONFLICTS OF INTERESTS IN PASTORAL RELATIONS

I. Introduction

- A. Accusations of sexual abuse or exploitation can come from many different sources, including, but not limited to, the purported victim or his or her family, a diocesan office, a confrere, an MS-agent, the accused himself, or a companion of the accused. Since each case is different, the following are general guidelines for responding to an accusation. The process should be modified according to the unique circumstances of the accusation, the needs of the accuser and the circumstances of the accused confrere. In each case, the Congregation promises to respond to the pastoral needs of everyone involved. The policies and procedures set forth below are subject to the canonical rights of a confrere, which include, but are not limited to, his right to appeal to the appropriate higher authorities.
- B. The privileged nature of the Sacrament of Penance (confession) with regards to confidentiality shall not be violated. Should a Missionary Servant receive the confession of an infraction in the context of the Sacrament of Penance, the infraction may not be revealed to anyone. The inviolability of the privileged nature of the Sacrament of Penance is presumed throughout this document. Please see definition above.
- C. Each confrere has the shared responsibility of maintaining the ethical integrity of a ministry of the congregation. Consequently, it is essential for every confrere or MS-agent to be alert for signs of improper behavior, non-observance of pastoral limits, or actual or potential conflicts of interest on the part of any member of the community. Vigilance is essential to protect those who depend on us for pastoral guidance and compassion and to ensure the integrity and preservation of the spiritual and evangelical values of our ministries.
- D. If a confrere or MS-agent becomes aware of any fact that causes him to have a reasonable suspicion that a confrere or MS-agent is, or has been, or is about to become, involved in improper behavior, non-observance of pastoral limits, or actual or potential conflicts of interest, he must promptly take appropriate action to resolve his suspicions. This may be accomplished in any one or more of several ways. The only thing that the confrere or MS-agent should not do in such a circumstance is to ignore his suspicions. He may choose to speak with the suspected confrere about his concerns in a loving and respectful way. He may leave an anonymous note asking whether the Congregation should have any concern about the behavior he has observed. He may try something else to address the cause for suspicion.
- E. If, after the accused's initial response, a reasonable suspicion of improper behavior, non-observance of pastoral limits, or disregard for actual or potential conflicts of interest persists, the confrere or MS-agent responding to such a suspicion shall inform the General Custodian or another member of the Council of the pertinent facts and circumstances upon which his suspicions are based. Nevertheless, the seal of confession shall not be violated.
- F. The procedures below shall be followed whether or not:
 - 1. the accused is living or deceased;
 - 2. the accused is a current member of the Congregation;
 - 3. or the identity of the alleged victim is known.

II. Preliminary Investigation

- A. If a specific and definite accusation of pastoral misconduct is made against one of the confreres or an MS-agent, and the purported victim is an adult, the purported victim shall be treated with dignity, respect, and compassion and advised of his or her right to report the alleged misconduct to the appropriate authorities.
- B. The General Custodian or the persons appointed by him at the local level shall be informed promptly of the alleged pastoral misconduct by the confrere or MS-agent and they shall provide appropriate assistance and support to the purported victim.
- C. If required by local law or by the Missionary Servants, a report of the facts and circumstances giving rise to the reasonable suspicion shall be promptly communicated to the civil authorities in conformity with the requirements of applicable law or policy. Nevertheless, the seal of confession shall not be violated.
- D. The General Custodian shall inform the local ordinary where the alleged pastoral misconduct took place and as much of the accusation as the General Custodian deems appropriate.
- E. While the facts are being gathered, first steps should generally include offering psychological, medical, or spiritual counselling assistance to the purported victim and effectuating an immediate, but temporary, suspension of the accused confrere or MS-agent from his position. The accused should also be offered such psychological, medical, or spiritual counselling assistance as may be appropriate under all the circumstances. When a complaint of sexual exploitation of an adult is initially received, the General Custodian will gather sufficient information to complete a preliminary report which shall include at least the following information:
 - 1. The name, address, phone number, and current whereabouts of the alleged victim;
 - 2. The age of the alleged victim and the age at the time of the alleged exploitation;
 - 3. The date(s) and place(s) where the alleged exploitation occurred;
 - 4. The name and address of the alleged perpetrator;
 - 5. The nature and circumstances of the alleged misconduct; and
 - 6. Such additional information as may be necessary or appropriate.
- F. The General Custodian and his Council shall cooperate fully with any investigation by the civil authorities, which cooperation shall include disclosure of all information that is the basis for suspicion of abuse, making available any information, records, or reports that document the basis for the report, cooperating with any investigating agency, and making information, records and reports available to the investigating agency as required by law. Nevertheless, the seal of confession shall not be violated.

- G. During the investigation by civil authorities (external) and/or congregational authorities (internal), the accused confrere or MS-agent shall be temporarily separated from his position, subject to the civil and/or canonical rights of the accuser and the accused.
- H. The General Custodian, or his representative, shall offer to meet with the putative victim, responding compassionately to him or her, acknowledging that the experience of pastoral misconduct provokes strong feelings, giving assurance that all such allegations are treated seriously, explaining that his/her allegations will be handled in accordance with established policies and protocols, and affirming that he/she will be kept informed as the process moves forward.
- I. The General Custodian shall inform the accused about his right to have civil and canonical legal representation before talking to him about the case. The Congregation will assist the accused confrere or MS-agent in obtaining such representation. The General Custodian, or his representative, shall keep the accused confrere or MS-agent informed of the status of the complaint against him. He will ensure that the accused receives the appropriate type and level of support while the civil and ecclesiastical authorities investigate the complaint.

III. Steps Taken When Preliminary Investigation Finds Complaint to Be Credible

- A. If the complaint is deemed credible to the satisfaction of the General Custodian and his Council, the Congregation will offer pastoral help to the accuser and his or her family, as may be appropriate under all the known circumstances of the case.
- B. If the complaint is deemed credible to the satisfaction of the General Custodian and his Council, in the case of a confrere who has not yet made final profession, the Congregation shall take appropriate action, in consideration of all of the circumstances, up to and including the severance of all relations with him. Among the circumstances to be considered shall be: the severity of harm to the victim, the degree of the accused's apparent culpability, and the protection of the Congregation.
- C. If the complaint is deemed credible to the satisfaction of the General Custodian and his Council, in the case of an MS-agent who is living or working in the Congregation, the Congregation shall take appropriate action, in consideration of all of the circumstances, up to and including the severance of all relations with him. Among the circumstances to be considered shall be: the severity of harm to the victim, the degree of the abuser's apparent culpability, and the protection of the Congregation.
- D. If the complaint is deemed credible to the satisfaction of the General Custodian and his Council, in the case of a confrere in final vows, the Congregation may ensure pastoral attention, legal advice and treatment for the confrere, offering him fraternal support notwithstanding the legal penalties imposed or the restrictions set out by the Congregation. Among the circumstances to be considered shall be: the severity of harm to the victim, the degree of the abuser's apparent culpability, and the protection of the Congregation. If a confrere has fathered a child, the confrere shall seek a dispensation from his vows in order

to fulfill his personal responsibility to support the child.

IV. Steps Taken When Complaint Not Deemed Credible.

- A. If the complaint is **not** deemed credible to the satisfaction of the General Custodian and his Council, the Congregation may restore the accused confrere to the ministry he occupied or another ministry and may help in reestablishing his reputation.
- B. If the complaint is **not** deemed credible to the satisfaction of the General Custodian and his Council, the Congregation may restore the MS-agent to the position he occupied or another position and may help in reestablishing his reputation.
- C. The local ordinary of the diocese where the accusation was made should promptly be informed that the accusation proved to be untrue after careful investigation. The General Custodian or his representative should remain supportive of the accused during the entire process.

V. Final Investigation

- A. If the complaint is deemed credible to the satisfaction of the General Custodian and his Council, a full and final investigation of the suspected pastoral misconduct shall be conducted under the direction of the General Custodian.
- B. The General Custodian may designate one or more members of the Congregation and/or an independent agency to conduct and report on the investigation. The General Custodian will advise the accused to cooperate with the investigation, and may, in his discretion, invoke the vow of obedience, impose restrictions regarding domicile, and/or implement any other such measures permissible under Canon Law.
- C. A confrere or MS-agent may not be compelled against his will to cooperate with an investigation; however, his cooperation or lack of cooperation may be considered, in accordance with the Constitution and subject to the discretion of the General Custodian and his Council, in connection with any decision whether to remove him from his position and/or to subject him to restrictions.
- D. Among the primary and urgent objectives of such investigation shall be to determine the following:
 - 1. The possibility of other instances of similar pastoral misconduct by the accused.
 - 2. The existence and identity of any other victims of such alleged pastoral misconduct.
 - 3. The involvement of other confreres and MS-agents in the reported instance, similar instances, or related instances of pastoral misconduct.
 - 4. Whether and to what extent conditions should be placed on the work, circumstances, or supervision of the accused in order to protect the safety and well-being of the community.

5. The true facts of the incident or incidents of pastoral misconduct.
 6. The culpability of the accused confrere and/or MS-agent.
 7. The nature and extent of harm to the purported victim or others.
 8. Any other issues that, under the circumstances, are considered relevant.
- E. A timely and accurate report of the investigation shall be made and delivered to the General Custodian.
 - F. Except under circumstances that might, in the judgment of the General Custodian and his Council, create a realistic threat of physical harm to any person or the obstruction of justice, a copy of the report, or appropriate portions of it, should be shared with the accused.
 - G. Except under circumstances that might, in the judgment of the General Custodian and his Council, create a realistic threat of physical harm to any person or the obstruction of justice, a copy of the report, or appropriate portions of it, should be shared with the victim.
 - H. If at any time during the investigative process, judicial proceedings (either civil or criminal) are commenced, the General Custodian may, in his sound discretion, suspend some or all further internal investigative and/or disciplinary procedures until the judicial proceedings are completed. In such cases, the General Custodian will advise accused and all other interested parties, of that decision.
 - I. All documents relating to any accusation, investigation, report, and/or discipline against a confrere or MS-agent, shall be maintained in accordance with the Congregation's policy of document retention.

VI. Discipline of the Accused When Culpability Established

If, after due consideration of the investigative report and such other information as may be deemed appropriate, the culpability of the accused confrere or MS-agent is established to the satisfaction of the General Custodian and his Council, the following steps shall be taken:

- A. The General Custodian shall consider, under the totality of the facts and circumstances, taking actions with respect to the accused including, but not limited to:
 1. Arrange for psychological and/or medical evaluation and intervention.
 2. Establish limits in terms of community life and personal activities.
 3. In the case of a confrere, establish limits, which may include suspension, as to work, ministry, or other activities.
 4. In the case of an MS-agent, establish limits, which may include suspension, as to residence, employment, or other community activities.

- B. The General Custodian shall inform the corresponding diocesan office in order to communicate the nature of the accusation, the proceedings that were followed, the results of the investigation, and the actions taken by the Custodian General.
- C. The Custodian General and his Council will consider several factors relative to the future work of the confrere or MS-agent, including:
 - 1. Is this the first and only confirmed case of sexual abuse by the accused confrere or MS-agent?
 - 2. Was this an isolated incident, unlikely to be repeated?
 - 3. In the case of a confrere, does the evidence support the likelihood that the confrere possesses the desire and capability to live a chaste, celibate life in the future?
 - 4. Does evidence support the likelihood that the accused is unlikely to commit similar acts of pastoral misconduct in the future?
 - 5. Does the accused frankly and sincerely acknowledge his responsibility for violating professional and ethical boundaries?
 - 6. Is the accused willing to commit to a "wellness plan" developed in conjunction with the General Custodian or his representative that includes regular and appropriate supervision and monitoring, good prospects for a healthy, balanced life-style for the accused, and the safety and well-being of those with whom he is likely to come into contact?
 - 7. Are there reasonable assurances that the accused will comply with the wellness plan and that it will adequately meet the requirements for the safety and well-being of the community?
- D. If the above criteria are met and judged reasonably certain of fulfillment by the accused confrere or MS-agent, then the General Custodian with the knowledge and consent of the local ordinary may assign the accused to a position where the wellness plan is most likely to be fulfilled.

VII. Support for the Victim When Culpability Established

In the event that the culpability of the accused confrere or MS-agent is established to the satisfaction of the General Custodian and his Council:

- A. Except under circumstances that might, in the judgment of the General Custodian and his Council, create a realistic threat of physical harm to any person or the obstruction of justice, the victim shall be informed of:
 - 1. The decision to allow the accused confrere or MS-agent to return to work under the strict conditions of a wellness plan.
 - 2. As much of the details of the wellness plan as the General Custodian may deem appropriate.
 - 3. The victim's right to seek the advice of counsel with respect to any civil relief to which he or she may be entitled.
- B. The General Custodian shall exercise his judgment, in consideration of all of the facts and

circumstances, with respect to the needs of the victim, including but not limited to:

1. An offer of psychological and/or medical evaluation.
2. An offer of psychological and/or medical care.
3. An offer of spiritual counseling.
4. An offer of such rehabilitative services as may be appropriate.

VIII. Promoting Reconciliation When Culpability Not Established

If it is established, to the satisfaction of the General Custodian and his Council, that the present accusation is unfounded, the Custodian General shall inform all parties concerned of that determination and take such actions as are reasonably calculated to promote a healing and reconciliation process among the persons involved.

IX. Multiple Instances of Misconduct

- A. In the event of a second or subsequent accusation of sexual exploitation by a confrere or MS-agent whose culpability was previously established to the satisfaction of the General Custodian and his Council, an initial determination shall be made by the Council as to whether the new allegations are credible. If so, then, while the investigation, reporting, and determinations regarding the new allegations are performed in accordance with the provisions and procedures set out in the sections above, the following steps shall be taken:
 1. An accused confrere shall be immediately removed from active public ministry.
 2. An accused MS-agent shall be immediately removed from any position in the community.
 3. The case shall be further investigated as to the circumstances of the accused, the effects on the community, and the harm to the purported victim.
 4. With input from all appropriate parties, a specific, definite, and strict wellness plan shall be created and implemented for the supervision and oversight of the accused.
 5. If reassignment of the accused is contemplated, The General Custodian or his representative shall solicit the consent and suggestions of the ordinary with respect to discipline of the accused and support for the purported victim.
 6. Final determinations shall be made promptly with respect to the discipline of the accused and support for the purported victim.
- B. In the event that the culpability of the accused confrere or MS-agent with respect to the second or subsequent accusation is established to the satisfaction of the General Custodian and his Council:
 1. The General Custodian will remove the accused confrere from any public ministry, after insuring the protection of the civil and canonical rights of the confrere including, but not limited to, his right to appeal to the appropriate higher authorities.
 2. The confrere will enter a period of prayer and penance in accordance with a detailed

and specific penance plan providing for strict supervision, direction, and guidance for the accused.

3. The accused MS-agent shall be disciplined in a manner and to an extent as the General Custodian and his Council may deem appropriate, after due consideration of:
 - a. the nature and circumstances of the offense(s) and the history and characteristics of the accused;
 - b. the need for the discipline imposed to reflect the seriousness of the offense, to promote respect for the Missionary Servants, and to provide just punishment for the offense;
 - c. the requirement of adequate deterrence of future misconduct;
 - d. the protection of the Congregation and the community from further misconduct by the accused; and
 - e. the needs of the accused for educational or vocational training, medical care, or other correctional treatment.
 4. The Custodian General will communicate so much of the disciplinary determination and penance plan to the accuser, the accused, and any other appropriate person or organization as may be compatible with these goals and purposes.
 5. Three years after the second confirmed pastoral misconduct, an accused confrere may petition the General Custodian to be allowed to engage in some type of ministry in controlled circumstances, such as prison chaplaincy, under strict supervision and with the full knowledge and consent of the local ordinary.
 6. The decision of the General Custodian and his Council to approve such a petition would depend upon a careful evaluation of the confrere's behavior during this three year period, including but not limited to the following:
 - a. The confrere's active engagement in a process of psychological counseling, regular spiritual direction, and the written recommendation of both the counselor and the spiritual director.
 - b. The confrere's full and active participation in the spiritual and communal life of the congregation during the three-year period.
 - c. The creation of a strict, detailed, and definite safety and wellness plan agreed to by the confrere, the General Custodian, and the local custodian of the
 - d. Missionary Cenacle where the confrere would reside while exercising this ministry.
 - e. The determination by the General Custodian that the new wellness plan is compatible with the safety and well-being of all interested parties and the community as a whole.
- C. If, and when, a wellness plan is approved, it shall be the responsibility of the Custodian General to communicate to the accuser, the accused, the ordinary, and/or others involved in the case, so much of the results of the investigation, the reasons for the reassignment, and the requirements of the wellness plan as may be, in the judgment of the General

Custodian and his Council reasonable and necessary for the successful implementation of the wellness plan.

- D. If it is established, to the satisfaction of the General Custodian and his Council, that the present accusation is unfounded, the Custodian General will inform all parties, concerned so as to promote a healing and reconciliation process among the persons involved.

Promulgated, February 17, 2016

Policy on Ethical Relations in Ministry with Adults

I hereby attest to having received and having diligently studied the Policy on Ethical Relations in Ministry with Adults of the Missionary Servants of the Most Holy Trinity.

Name:

Signature:

Date:

Appendix XI Burial Policy

Missionary Servants of the Most Holy Trinity

According to established policy, a Missionary Servant will be buried in the ST cemetery closest to the place of his death, unless he decided to be cremated. Therefore,

I, _____, being emotionally and mentally competent, wish that my body be:

- Buried in the closest ST cemetery (Holy Trinity, Alabama, USA, or Huitzila, Hidalgo, Mexico).
- Cremated and buried in:
 - Holy Trinity, Alabama
 - Huitzila, Hidalgo, México
 - Basilica of Our Lady of Guadalupe, Mexico

Signature and Date



MISSIONARY SERVANTS OF THE MOST HOLY TRINITY

LAST WILL AND TESTAMENT

I, _____ being of sound and disposing mind and memory, do hereby make, publish and declare this to be my last Will and Testament, hereby revoking all former Wills and Codicils by me at any time heretofore made.

FIRST: I direct that all my just debts be paid out of my estate by my Executor, hereinafter named, as soon after my death as practicable.

SECOND: All the rest, residue and remainder of my estate, real, personal and mixed and wheresoever situated, of which I shall die seized and possessed, or to which I shall be entitled at my decease, I give, devise and bequeath to The Missionary Servants of the Most Holy Trinity

THIRD: I hereby nominate, constitute and appoint the General Custodian of the Missionary Servants of the Most Holy Trinity and his successor in office to be the Executor of my estate. My executor is authorized to serve without bond and is expressly authorized to sell real or personal property without order of court. If for any reason it is necessary at any time for the proper administration of my estate that there be a fiduciary who is a resident of the jurisdiction in which the estate may be administered, and if at such time there is no fiduciary who is then such a resident, then I authorize my Executor to appoint a co-fiduciary who is such a resident, with unlimited power in my Executor to remove, and to appoint substitutes and successors for the co-fiduciary when the need therefore arises. Said co-fiduciary so appointed shall have the power to act only with respect to those matters and property which necessitated such appointment and shall have no other authority.

In testimony whereof I, _____,

have to this, my Last Will and Testament subscribed my name and signature

_____ Date: _____

WITNESSES

The foregoing instrument was, at the date hereof, signed, published and declared by _____, the Testator above named, as and for his Last Will and Testament, in our presence, who in his presence, and at his request and in the presence of each other, have subscribed our names as witnesses thereto each of us believing the said _____ to be of sound and disposing mind and memory.

Witness: _____

Name and Signature

Witness: _____

Name and Signature



MISSIONARY SERVANTS OF THE MOST HOLY TRINITY

DURABLE POWER OF ATTORNEY FOR HEALTH CARE

1. DESIGNATION OF HEALTH CARE AGENT

I, _____ hereby appoint:

Name _____ Telephone _____

Address _____

as my agent to make health care decisions for me as authorized in this document.

If the person named as my agent is not reasonably available or is unable to act as my agent, then I appoint the following person to serve in that capacity:

Name _____ Telephone _____

Address _____

2. MISSIONARY SERVANT LIFE

It is my firm conviction that my life as a Missionary Servant of the Most Holy Trinity has meaning and value in any circumstance that occurs once this durable power of attorney is declared effective. My decision to join the Missionary Servants of the Most Holy Trinity was a free choice and is one that has been constantly reaffirmed over the years by my free choice to live the Missionary Servant life. I do not wish any third party to look to anyone else for decisions regarding me except those acting as my agent(s).

I especially expect healthcare providers to act on my behalf as directed by my agent(s) and not look to my family for decisions about my care. Also, I expect my family to honor my wishes and not interfere in decisions about my life or care. This desire in no way manifests a lack of love for my family, but it does recognize that I am a Missionary Servant of the Most Holy Trinity and the proper ones to decide about my care are the Missionary Servants of the Most Holy Trinity through my agent(s). My agent(s), however, may consult with my family regarding my affairs or health care and I encourage such consultation. If against my wishes, this power of attorney, or decisions made because of it is referred to a court of law, I expect the usual presumptions found in law to look to family especially for health care decisions to be put aside. I made a free choice in life to be a Missionary Servants of the Most Holy Trinity and to execute this durable power of attorney; I expect choices to be honored and the decisions made by my agent(s) to be upheld.

3. CREATION AND EFFECTIVENESS OF DURABLE POWER OF ATTORNEY FOR HEALTH CARE.

With this document I intend to create a durable power of attorney for health care, which shall take effect when and if two physicians, one of whom is my attending physician, certify that I am disabled because I lack sufficient understanding or capacity to make or communicate decisions with respect to my own health care. The power shall continue in effect during my disability.

4. GENERAL STATEMENT OF AUTHORITY GRANTED

Except as indicated in Section 5, below, I hereby grant to my agent named above full power and authority to make health care decisions on my behalf, including the following:

- a. To request, review, and receive any information, verbal or written, regarding my physical or mental health, including, but not limited to, medical and hospital records, and to consent to the disclosure of this information;
- b. To employ and/or discharge my health care providers;
- c. To consent to and authorize my admission to and discharge from a hospital or related institution;
- d. To give consent for, or to withhold consent, for, x-ray, anesthesia, medication, surgery and all other diagnostic and treatment procedures prescribed (ordered) by or under the direction of a licensed physician, dentist or podiatrist. This authorization specifically includes the power to consent to measures for relief of pain.
- e. To direct the withholding or withdrawal of life-sustaining procedures or measures when and if I am terminally ill or permanently unconscious. Life-sustaining procedures measures are those forms of medical care which only serve to artificially prolong the dying process, and may include mechanical ventilation, dialysis, antibiotics, artificial nutrition and hydration, and other forms of medical treatment which stimulate or maintain vital bodily functions. Life-sustaining procedures do not include care necessary to provide comfort or alleviate pain.
- f. To take any lawful actions that may be necessary to carry out these decisions, including the granting of releases of liability of medical providers.

5. SPECIAL PROVISIONS AND LIMITATIONS

In exercising the authority under this durable power of attorney for health care, the authority of my agent is subject to the following special provisions and limitations:

6. GUARDIANSHIP PROVISION

If it becomes necessary for a court to appoint a guardian of my person, I nominate my agent or successor agent name above to be the guardian of my person.

7. SIGNATURE OF PRINCIPAL By signing here I indicate that I understand the purpose and effect of this document.

Name and Signature: _____

Date: _____

8. SIGNATURE OF WITNESSES

I declare that the person whose signature appears on this document signed or acknowledged the document in my presence and that I am not the person appointed as agent by this document.

First Witness

Name and Signature: _____

Date: _____

Second Witness

Name and Signature: _____

Date: _____



MISSIONARY SERVANTS OF THE MOST HOLY TRINITY

DECLARATION CONCERNING REMUNERATION

Let it be known, that I _____ At _____

IN CONFORMITY WITH the laws of the Roman Catholic Church concerning the remuneration of candidates, postulants, novices, and members of a religious community acknowledged by said Roman Catholic Church, which law I fully know and deliberately acknowledge and to which I voluntarily submit myself, and

FOR AND IN CONSIDERATION OF THE BENEFITS accruing to me as candidate, postulant, novice, or member of the approved religious community, incorporated as the MISSIONARY SERVANTS OF THE MOST HOLY TRINITY under and by virtue of the laws of the State of Alabama, U. S. A.,

DO SOLEMNLY STATE AND DECLARE, that I shall never claim or demand, directly or indirectly, any wages, compensation, remuneration, or reward either in specie or by way of annuity or pension, for the time or for the services or work that I devote for or with said MISSIONARY SERVANTS OF THE MOST HOLY TRINITY during the time that I remain there or elsewhere in the name of or upon commission from said Congregation.

IN WITNESS WHEREOF I have hereto subscribed my name and signature

_____ Date: _____

This instrument was signed, published, and declared by the above named _____

in the presence of us, who in his presence and at his request, and in the presence of each other, have hereunto subscribed our names as witnesses,

Witness: _____ Name _____ and
Signature _____

Witness: _____ Name _____ and
Signature _____



MISSIONARY SERVANTS OF THE MOST HOLY TRINITY

CESSION OF ADMINISTRATION AND DISPOSITION OF USE AND USUFRUCT

Let it be known that I, _____ In _____

IN CONFORMITY WITH the laws of the Roman Catholic Church concerning the Administration of the property, its Use and Usufruct, of a member of a religious community acknowledged by said Roman Catholic Church (Codex Juris Can. 668)

FIRST: Do hereby cede for the term of my vows the administration of my property, which mainly consists of:

To: _____

SECOND: Do hereby ordain and declare that, except as otherwise duly provided, all the use and usufruct, to-wit: The interest, rent, income, annuities, royalties, bonus, etc., shall be disposed of or expended according to the best judgment of said:

Name and Signature _____

IN WITNESS WHEREOF I have hereto subscribed my name this _____ day of _____, in the year of our Lord, _____ at _____

This instrument was signed, published, and declared by the above named _____

in the presence of us, who in his presence and at his request, and in the presence of each other, have hereunto subscribed our names as witnesses, on this date _____

Witness: _____

Witness: _____

Appendix XVI: Mission Year Covenant

Mission Year

Purpose Statement: The mission year is ordinarily a period lasting an entire calendar year during which the professed participates in a full-time capacity in one of our mission sites. During this time period, it is important that the professed has support in terms of fraternity and for the sake of the development of apostolic skills specific to Missionary Servants. At the same time, with the accompaniment of the Post Novitiate Director, the Mission Site Director (in the case of a parish, the Director need not be the pastor) and spiritual director, the professed will have the goal to integrate the academic with the experience of reality on mission. This experience will undoubtedly offer a space for vocation confirmation as a Missionary Servant of the Most Holy Trinity.

The process includes the following:

- + Discernment between the professed and the Director of the Post novitiate. This discernment has as a goal to identify the tasks of development that will receive attention during the mission year and then identify the mission site where these tasks may be accomplished.
- + Communication with the General Council in terms of the proposed mission site.
- + Communication with the mission site.
- + Development of the Mission Covenant with the mission site director, the professed and the director of the post novitiate.

Sample of a Mission Site Covenant (as much space as necessary is used).

1. Biographic information on the professed:
2. Synthesis of previous pastoral/apostolate experiences:
3. Primary goal of the mission experience:
4. Other goals of the mission experience:
5. Dates of arrival and of departure from mission site:
6. Pertinent documentation such as visas, etc.
7. Name of the Mission Director:
8. Dates when the Post Novitiate Director will visit:
9. Financial responsibilities: Usually, the Post Novitiate takes care of travel expenses to the mission. The mission takes care of the return expenses as well as daily expenses of the professed.
10. Insurance coverage:
11. Contact information in case of emergency:
12. Other relevant information:

Appendix XVII: Policy Regarding Final Vows and Ordinations

PERPETUAL VOWS AND ORDINATIONS

To the Post-Novitiate Director, the Brothers in the Post-Novitiate and to the Missionary Servants in general: Considering that there could be some confusion regarding the economic costs of ceremonies for Perpetual Vows, Ordinations to the Transitory Diaconate and Priestly Ordinations, we hereby clarify that:

A. PERPETUAL VOWS

1. The Brothers in formation, approved for professing their Perpetual Vows as Missionary Servants of the Most Holy Trinity, are to make their religious profession in a ceremony at the place where they concluded this phase of formation. The Director of the Post-Novitiate and the Brothers in formation are in charge of planning and carrying out the celebration. The economic costs of said celebration will be coordinated between the General Council and the Director of the Post-Novitiate. This norm may vary at the discretion of the Custodian General and his Council.
2. The congregation will not assume any additional expenses regarding: visa procedures, local or international transportation, housing family or friends to participate in the Perpetual Vows ceremony.
3. Under the discretion of the General Custodian and his Council; the congregation could give economic assistance to the parents; or to those attending in their name, to travel to the Perpetual Vows ceremony.
4. Confreres who live nearby and in the same country are invited to attend. Others, in keeping with the spirit of evangelical poverty, should attend only when they have a serious reason and have received the permission of the General Custodian.
5. Missionary Brothers, after professing Perpetual Vows, may have a celebration in their home parishes with their families and friends.

B. TRANSITIONAL DIACONATE

1. Should be celebrated in the place where the formation process has been completed. (This could include mission sites where those Brothers who have finished with their studies are serving and would serve as deacons on mission).
2. The date of the celebration will be well anticipated and traditional congregational Marian dates will be privileged.

3. The Director of the Post-Novitiate will present reasonable budget to cover the costs of the ceremony (this includes: the stipend for the celebrating Bishop and a simple reception). All of the events and details for the Ordination will be coordinated by the Post-Novitiate Director or by his delegate.
4. The congregation will not assume any additional expenses regarding: visa procedures, local or international transportation, housing family or friends to participate in the ordination ceremony.
5. Confreres who live nearby and in the same country are invited to attend. Others, in keeping with the spirit of evangelical poverty, should attend only when they have a serious reason and have received the permission of the General Custodian.

C. ORDINATIONS TO THE PRIESTHOOD

1. If those who are to be ordained to the priesthood are from different countries, then the ceremony will take place where the Post-Novitiate is situated.
2. If those who are to be ordained are all from the same country the Ordination ceremony may take place in their home country with previous authorization from the General Custodian and his Council.
3. The date of the celebration will be well anticipated and traditional congregational Marian dates will be privileged.
4. The Director of the Post Novitiate will present a reasonable budget to cover the costs of the ceremony (this includes: the stipend for the celebrating Bishop and a simple reception). All of the events and details for the Ordination will be coordinated by the Post Novitiate Director or by his delegate.
5. The newly ordained will concelebrate their First Mass the day after their Ordination in the place where the priestly Ordination was celebrated.
6. The congregation will not assume any additional expenses regarding: visa procedures, local or international transportation, housing family or friends to participate in the Ordination ceremony.
7. Under the discretion of the General Custodian and his Council; the congregation could give economic assistance to the parents; or to those attending in their name, to travel to the Ordination ceremony.

8. It is the responsibility of the new ordained and his family, the planning, carrying out the First Mass celebration in his hometown; we understand people's generosity has no limits when it comes to events so important for them.
9. Confreres who live nearby and in the same country are invited to attend. Others, in keeping with the spirit of evangelical poverty, should attend only when they have a serious reason and have received the permission of the General Custodian.

Appendix XVIII: Mission Plan

Mission Plan

The Mission Plan covers the space of a year, clearly identifies the geographic area of responsibility, the process that are in place, the challenges present and the action steps to be taken. This plan is the basis for the elaboration of a budget proposal for subsidy from the Congregation. The Congregation establishes the fiscal year from June to June. In order to be able to study and evaluate the proposal, the General Council requires that the proposal be presented along with the mission plan during the month of April.

Dates for this Mission Plan: _____

Names of the Mission Program Director and persons that collaborated with the development of this plan:

Brief description of what has worked well during the previous year, if possible, make reference to the previous year's mission plan:

Brief description of the challenges that appeared during the previous year:

Identify the action steps that are proposed for the next fiscal year:

What other important information is necessary to transmit to the General Council in order to approve this plan and the resources that are being requested:

An evaluation report is anticipated of this mission plan approximately during the months of January-February.

Appendix XIX: Departure from Formation Program

Departure Norms and guidelines specific the pre-novitiate

There are different circumstances related to the departure of a student:

Voluntary: The student arrives at the decision to depart.

Involuntary: The director of the program or the General Custodian determines that the student should not continue in the formation program.

Transition Process:

A departure form is filled out, signed by the student. The document specifies the reason for the departure. In this document relevant information will also be provided in case the student should seek to return to the program. Should the student seek readmission, it is a matter of beginning the process at the level of vocation promotion. It is expected that the former student experience his decision to the fullest outside of the formation house. At least a year must pass before he can seek to be readmitted and the process of accompaniment in vocation promotion is a minimum of a year. Further, there is no guarantee that he will be accepted.

Confidential document: A confidential document is placed in the students file in case the student should seek readmission in the future.

There is a need to be especially attentive to immigration requirements should the student be from outside of the country.

It is important to clarify policy related to hospitality offered by any of our cenacles. - See norms related to externs.

Communication of departure:

Being attentive to the requirements of charity:

- Communication in the VDC, in particular to the vocation promoter. In a subsequent VDC meeting, the departure of the student will be communicated and discussed if necessary. It is important to maintain clear avenues of communication.
- Communication with the parish of the young person. It is important that communication be clear.

Should the student seek to be readmitted:

Ordinarily:

- The process essentially begins again.
- The former student contacts the vocation promoter a year after his departure.
- The vocation promoter gathers any previous documentation and the counsel of the director of the house from which he departed.

- The case is brought before the vocation promoter's team.
- Accompaniment of the student begins.
- The student is presented before the admission board, etc

In each case, details of the departure need to be taken into account. Counsel is taken with the vocation promotion team, the VDC director. If necessary, exceptions to the norm will be considered.

DEPARTURE FORM

Student Name: _____

Formation Stage: _____

Name of the Director of Formation: _____

Was the departure voluntary or involuntary? _____

Reason for departure:

In case this student was to attempt to make application for entry into our program again, what would be your recommendation?

Signature of Director: _____

Signature of student: _____

Place and Date: _____

This document is placed in the student file. If the departure takes place during the novitiate or post novitiate, the entire file is transmitted to the Generalate. If the departure takes place in any other stage, a copy of this file is sent to the Vocations Director.

Appendix XX: Religious or Clerics

Regarding Petition by Religious or Clerics

The starting point of these guidelines is no. 9 of Specific Considerations in the Formation Handbook, states the following: *Religious in final vows, Priests and deacons that seek admission into the Congregation will be presented with a formation program specifically tailored to their formation level without limiting the norms established by Cannon Law (Can. 265-272) and Congregational norms.*

These guidelines are not meant to be exhaustive, each case will most probably present specific circumstances.

- I. The persons who will ordinarily be attentive to these cases in the initial stage, will be the vocation director responsible for the area where prospect finds himself and the VDC director.
- II. Documentation and requirements are identical to those ordinarily expected of any other prospect.
- III. As noted in Specific Considerations, no. 2, this is an “exceptional case”: *What is meant by exceptional is that the prospect has a superior preparedness in the five areas of formation that recommend the person for entry into the Formation Program. Special attention is given to emotional maturity, capacity for community life and the apostolates of the Congregation. The responsibility to make manifest the exceptional qualities that recommend the prospect, rests upon the prospect himself. The discernment process will be much more intense and for a longer time period. Besides a psychological evaluation that is much more focused on the older individual, counsel will also be sought from members of the Congregation who have firsthand experience of the individual. In the consideration of each case, we will also be attentive to the fact that the Formation Program does not have the capacity to receive the given individual.* An example of this is the possibility that we may not have, at present, the expertise necessary in terms of a given culture to provide adequate formation.
- IV. Documentation, a permission is required from the Major Superior in the case of a Religious or that of a Bishop, in the case of a cleric. What is preferred is not just a permission but an actual recommendation to discern a vocation with the Congregation. This letter is directed to the General Custodian.
- V. The vocation promotion requirement, as listed under Requirements of Each Stage, in the Handbook, states: *In the course of this stage the necessary requirements of cannon law and of the Congregation are gathered.* To this period of no less than a year, a

prolonged experience in one of our missions as well as that of a retreat following the exercises of the Congregation.

Also listed under the requirements of the pre novitiate, is the recommendation of the Admissions Board.

- VI. Given a positive recommendation by the Admissions Board, this recommendation is presented to the General Custodian by the VDC Director along with a specific proposal to fulfill the requirements of prenovitiate, novitiate and postnovitiate. For example:
- A. The pre-novitiate may be a full time assignment at one of our missions for a prolonged period of time, under the supervision of the corresponding prenovitiate director.
 - B. Novitiate, in accord with the norms of Canon Law and those of the Congregation.
 - C. Post novitiate, a series of assignments, with corresponding renewal of vows until the time of Final Vows.

Once the General Custodian has approved the admission to the pre-novitiate, the General Custodian will communicate this decision to the Major Superior or corresponding Bishop.

- VII. Clarifying notes:
- A. It is not possible to petition immigration documents prior to the approval of the General Custodian.
 - B. The Congregation will not be responsible for debts incurred by the prospect, with the possible exception of educational debt.
 - C. It is important to be attentive to all required documents, including clarifying such issues as remuneration and medical insurance.

Appendix XXI: The Granting of Access to Confidential Documents

Beginning with vocation promotion and through the entire formation program, permission is petitioned from the prospect, the student and professed by way of a simple document such as presented below. In addition, it is also possible that, in accord with country specific requirements, other types of documents may be required. The program directors are responsible, such that local requirements be fulfilled.

Access Consent to Personal Documents

As indicated by the policies on document retention, there are documents that are gathered as part of the exercise of the Formation Program. The General Custodian, the Director of the Vocation Development Committee, the directors of Vocation Promotion, the Pre-Novitiate, Novitiate and Post Novitiate and specifically delegated persons in case by case circumstance, will have access to these documents.

I hear by grant access to all personal documents as stated above:

Name:

Signature:

Date:

Appendix XXII: Psychological Testing

Psychological testing is divided into three areas, in each area specific tests are recommended:

1. Clinical Area. Emotional state, presence of serious pathologies, problems that can be attended to before or during the formation process. These studies offer the capacity of gathering necessary information, not just from a pathological perspective, but also from a consideration of the strengths of the young person (see Cellerman on virtue theory).
 - Minnesota R2 (the short version) or PAI
 - Neo Pi R (test of the five) and/or 16 factor test.
 - Tree, person, house, human figure, and/or Rorschach.
 - Bender (neurological).
2. Intelligence. – At what level does he place. It is recommended that he place at medium and above.
 - Shipley.
3. Vocational area. What dreams, goals, abilities, desires, hobbies does he have? This area is approached especially through the clinical interview. At the same time, the study that has proven very helpful is the Allport test. The Kuder test also covers much of the same, but with greater detail. This might be a test to give once the student is in the program.

Also, especially in clinical interview, the theme of sexuality needs to be considered with especial focus on the theme of sexual abuse. The Congregation accepts the responsibility of creating spaces where minors and other vulnerable persons are safe.

In the psychological reports it is important that it states that a clinical interview did take place and notice given of the presence of risk regarding the abuse of minors and other vulnerable persons.

APPENDIX XXIII: POLICY ON VISITING AND RESIDING IN MISSIONARY CENACLES

Policy on non-Missionary Servants of the Most Holy Trinity visiting or residing in Missionary Cenacles and other ST residences

(Although this subject has been treated as parts of other policy documents, this statement is meant to treat the matter in a more comprehensive way, to cover the question of non-ST residents visiting or residing in ST residences in all reasonably foreseeable circumstances.)

Because we cherish the gift of hospitality, the encouragement of mission and collaboration in mission, and the need to protect the integrity of our spiritual patrimony, we welcome the opportunity to provide hospitality to others when it is appropriate and when safeguards are honored. Our commitment to living the evangelical counsels and common sense are the basis of these safeguards, and the following policy guidelines, of utmost importance, are offered in that spirit. Furthermore, these guidelines will be used in such a way that they not obstruct the implementation of local diocesan norms. For example, norms governing persons engaged in ministry.

The purpose of these guidelines is threefold: (1) to insure the necessary privacy for Missionary Servants and community life; (2) to avoid circumstances in which inappropriate relationships may develop; (3) to provide protection for visitors and confreres in those areas of relationship where scandal may be given or taken.

A welcoming and open-spirited hospitality should always be extended especially to family members of STs and to young men who visit or reside in our Cenacles as they discern a possible vocation to our Congregation. Special fraternal hospitality must also be extended to STs in formation, who visit or temporarily reside in Cenacles to develop a broader sense of Missionary Servant life. They should absorb as part of our spirit a concern for all children, women, and men and they should be aware of the documented protections we place around them and ourselves to maintain mutual integrity in our living and working relationships.

Family members of confreres and visitors of confreres should be welcomed for overnight stays in our cenacles and residences only with the permission of the local custodian. Ordinarily, these visits are only for overnight stays and not for periods longer than a week.

A confrere's bedroom is off limits to visitors of any kind. If others must be in the room for cleaning or maintenance purposes, the confrere should not be present. If medical or rehabilitation personnel are attending to a sick or disabled confrere, or if the confrere has mobility problems, the doors should left open, if appropriate, or a third person should be nearby.

If the confrere's private quarters include other rooms – bathroom, office or sitting room, for instance – a policy for visitors in those areas, respecting the directions in this document, should be determined by the local custodian.

In no case should unaccompanied children or adolescents, singly or in groups, be visitors or residents in any part of our Cenacles or residences.

Residence of externs in general should ordinarily be limited to no more than a week. For long-term (more than a week) or indefinite duration of residence, circumstances should be explained to the General Custodian or regional General Councilor and permission sought.

In the case of long-term (more than a month) or indefinite residence of the **member of another religious institute**, a formal request (should be made) is required by a major superior of that institute to the General Custodian. The request should include the reason such residence is requested, a certification that the member of his institute is in good standing, does not bear any civil or canonical injunction, and has not been credibly accused of sexual abuse of a minor. The request must also signify acceptance on behalf of the institute of all liability arising from the actions of his confrere and will hold the Missionary Servants free of any such liability.

If residence (of) sought by a (the) member of another religious institute is more than a week and no more than a month, the Major Superior of the religious seeking residence will provide the same assurances to the local Custodian.

The individual himself in the above instances requiring permissions must sign a document attesting to his good standing as noted above.

Charity and our missionary identity will often challenge us to provide hospitality to those most in need. Our Cenacles are a residence for Missionary Servants and not places where we are able to allow this type of direct assistance. In the case of extreme emergency – hurricane, floods, fire, etc – We will provide assistance to the best of our ability, but communication with the Generalate will be forthcoming and subsequent norms established.

Given today's immigration reality, the Generalate will provide timely instruction regarding sanctuary status.

APPENDIX XXIV: POLICY ON PROSPECTS FROM OUTSIDE OF THE AMERICAN CONTINENT.

Policy on Prospects

We are open to discern the possibility of a Missionary Servant vocation among men from outside the American Continent. We will give due consideration to those prospects who manifest an exceptional readiness for our Formation Program in the United States. The exceptional readiness is determined by the interviews, evaluations and testing that the US Vocation Director initiates. In turn, it will be the US Admissions Board who will make any recommendation for entry into the Formation Program.

As such, Missionary Servant Policy on Candidates from Outside the American Continent requires that the individual:

1. Be a practicing Catholic and aware of the nature of Religious Life, especially as regards to mobility, ability to live outside one's home country and culture, and the vows.
2. An extended period of discernment with the Missionary Servants.
3. Sound social and intellectual foundation that allows the person to welcome interaction with women and men in multicultural settings, openness to a diversity of beliefs and has a capacity for the academic demands of the formation program.
4. History of apostolic activity.
5. A level of emotional maturity that is well within his chronological age. I.e., Family of origin issues as well as sexual orientation have been explored and an important degree of integration has taken place.
6. Between 23 and 32 years of age and good physical health.
7. Is free from debt
8. Has finished High School (12 years of primary and secondary education) and at least one year of higher education (university, college or institute) Two or three years of higher education is ideal.
9. Is free from obligations to his family, especially as framed by the specific culture of the individual.
10. An excellent command of English (minimum TOEFL score of 75) and in general has a sound aptitude for languages.
11. Access to a means of communication that makes long distance accompaniment possible. i.e. electronic communication.
12. He can procure a visa for entry into the United States. This includes:
 - awareness of procedures to be followed in order to obtain a US visa.
 - Having the necessary documents of the home country to be able to petition the visa.
 - Financial resources to complete the application process.

APPENDIX XXV VOCATION PROMOTION PROCESS

What follows is the result of lived experience of the vocation promoters. The formats that are presented are at the disposal of all the vocation promoters allowing for the adjustments that may be necessary according to country, need, and so forth.

I. Beginning of Discernment

MISSIONARY

SERVANTS

In service to the poor as makers of apostles



Beginning of Discernment

Dear young man,

Thank you for your interest in becoming a Missionary Servant. In order to get to know you and be better able to help you in your vocation discernment, please fill out the following questionnaire as fully as possible.

First and Last Name	
Place and date of birth	
Present address	
Telephone	
Email	
Highest level of academic achievement and GPA	

How was it that you heard about us?
<p>We are a Religious Congregation who minister among the poorest and abandoned as Missionary Brothers and as Priests.</p> <p>In your experience, have you come to an understanding of the difference between “Diocesan” and “Religious”?</p> <p>Do you think Our Lord might be calling you to be a Missionary Brother or a Priest?</p>
What are some of your thoughts in terms of your desire to become a Missionary Servant?
How did your vocational call begin?

Marital Status	Single?	Married?	Divorced?	Children?
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Daily Life:

What is your occupation?
What is your participation in Church like?

If you have been in a seminary in the past:

Name of Diocese or Religious Congregation	
Seminary Address	
How long were you in formation?	
Name of the Formation Director at the time of your departure	
Reason for your departure	

II. Autobiography

TO WRITE YOUR AUTOBIOGRAPHY

As part of the discernment process with the Missionary Servants, we ask that you provide us with an autobiography. We suggest that before beginning to write, that you take the time to prayerfully meditate and consider the what of your life. Meditate, reflect, take some notes and then follow the guide.

Please note, it is possible that some of the following guideline questions have nothing to do with you or that you already answered in a previous section, simply continue to the next point. Take your time, often persons end up writing 8-15 double spaced pages. Don't be overly preoccupied, this is the story of God in your life.

1. Family History

What was your childhood like? What has your relationship been like with your parents in the passage of time? Describe how your parents have influenced your life? Describe also, how your siblings have influenced your life?

2. Interpersonal Relationships

Who are your best friends and how have they influenced your life? What helps you make friends? Share a bit regarding your relationship with all types of persons – men, women, adults, children, elderly. In your personal development, what was your sexual awakening like? Have you had a relationship as a couple? Did you have any children? Have you have any experiences of profound loss? What was that experience like?

3. Health history.

Tell us about your health. Have you had serious illness, accidents, been hospitalized? How about your family – have there been significant issues of family health? Any issues with alcohol or drug abuse? Mental health issues?

4. Academics

How would you describe your experience of grammar school? High school? Your time in college? Share with us some of the more meaningful moments for you. What was the most positive and what was most difficult for you in school?

5. Employment

Share with us what has been your employment history. Describe what your relationship was like with your co-workers and persons in charge. What do you think have been the greatest lessons learned from your employment experience? What has brought you most satisfaction? How have you felt during periods of unemployment?

6. Purpose in life

What would you say has been the “great purpose” in your life? What are your gifts and talents? How have you dealt with disillusionment and failure? What do people say about you? What have been significant decisions you have made? What is it that brings the most passion into your life?

7. God and prayer

How did you come to discover God in your life? What is the image of God that inspires you the most? Who has been your guide in your journey towards God? Is there a particular passage in Scripture that you profoundly identify with? What has been your experience of spiritual direction? Share with us a bit regarding your prayer life.

8. Church

When you hear the word “church”, what comes to your mind and heart? What is your participation like in your parish? Has there been a moment or event in your parish that has “called out to you”?

Has there been an experience in your parish that you did not like? Have you come to know non-Catholic churches? Anything that you liked of those churches?

9. Service

It is notable that the closer we experience ourselves with the Lord, the more we want to be attentive to the needs of neighbor. Have you had this experience in your life? Do you participate regularly in an activity that deals with responding to the needs of neighbor? Think of a moment when you attended to a person in need, what feelings were evoked by that experience?

10. Religious Life and Missionary Servants of the Most Holy Trinity

What fills us with immense gratitude is the experience of God drawing close to us and becoming aware that he calls us in a special way, and often to Religious Life. How has this experience of a call, of a vocation evolved in your life? What are the gifts that God has given you in order to follow this way of life and become a good Religious?

In this spiritual journey, following God's inspiration towards Religious Life, tell us how this journey of yours relates to the Missionary Servants? How did you come to know about us? What do you find most challenging in terms of our life style and mission?

We share a single identity, we are Religious who make profession of the vows of poverty, chastity and obedience. We give expression to this identity in two ways, in accordance to God's call: A Missionary Brother or a priest. As you reflect upon this statement of ours, what comes to your mind? What do you think of the vows? How might you discern if you are called to be a Missionary Brother or a priest?

III. Document Request

The proposal is that each vocation promoter, when the moment arrives, can take what follows and adapt it according to need. For example, the need for the apostille that Costa Rica requires, etc.

Missionary Servants of the Most Holy Trinity

Document Request

Dear _____ as we have accompanied you in discerning the will of God for you, a next step is to request from you some documents. As you gather the following documents please send them in to me. Also, please let me know as soon as possible if any concern surfaces or if a document becomes difficult for you to find.

PERSONAL DOCUMENTS:

1. Recent photo.
2. Birth certificate.
3. Copy of passport.

4. Copy of visas.
5. Copy of relevant military service.
6. Copy of driver's license.
7. Baptismal certificate, with marginal notes and the address of parish.
8. Confirmation certificate.
9. Marriage certificate of parents, if relevant.
10. Criminal background check.
11. Five letters of recommendation, por lo menos una de un miembro de familia y dos de profesionales. (Pastor, spiritual director, coworkers, etc).
12. Consent of Access to confidential documents.

DOCUMENTS PERTAINING TO EDUCATION

1. High school or equivalent.
2. University, postgrad, as relevant, especially philosophy and theology.

MEDICAL AND PSYCHOLOGICAL

1. Complete physical exam.
2. TB test
3. HIV test
4. Dental exam
5. Eye exam
6. Psychological exam.

IV. Formal Application

FORMAL APPLICATION

Dear young person, you are holding in your hands the application that you will need in order to make a formal application to enter our formation program. The information that is gathered here will be presented to the Admissions Board. The Admissions Board of the Congregation has the responsibility to discern, in a prayerful context, God's will in terms of your entry into the formation program.

If in the course of filling out the application you have any question or concern, please let me know as soon as possible.

Today's date : _____

Personal Information

Your full name	
Place and date of birth	
Present address	
Phone number	
Email	

Family Information

	Father	Mother
Name		
Occupation		
Address		
Any pertinent information		

Chronological list of siblings

Name	Age	Lives at home?	Occupation	Marital status

Health Information

What illnesses have you suffered?	
-----------------------------------	--

Are you under medical treatment?	
What medications are you taking?	
Any other pertinent health informaiton	

Studies

Educational level	Dates	City	School	GPA
High school				
University				
Other				

Vocation

We are a Religious Congregation; our mission is among those who are most in need. Some of us are Missionary Brothers, others are priests. Our vocation is rooted most profoundly in a radical discipleship, a following of Our Lord Jesus Christ.

Share with us on what your experience has been in following the Lord:

Share with us a few words on the way you identify with Religious Life, for example, why not diocesan life:

Share with us regarding your present attraction towards Missionary Brother or priest:

Name and Signature of petitioner

Thank you for responding to the call of Our Lord and having taken the time to take this very significant step in applying for entry into our formation program.