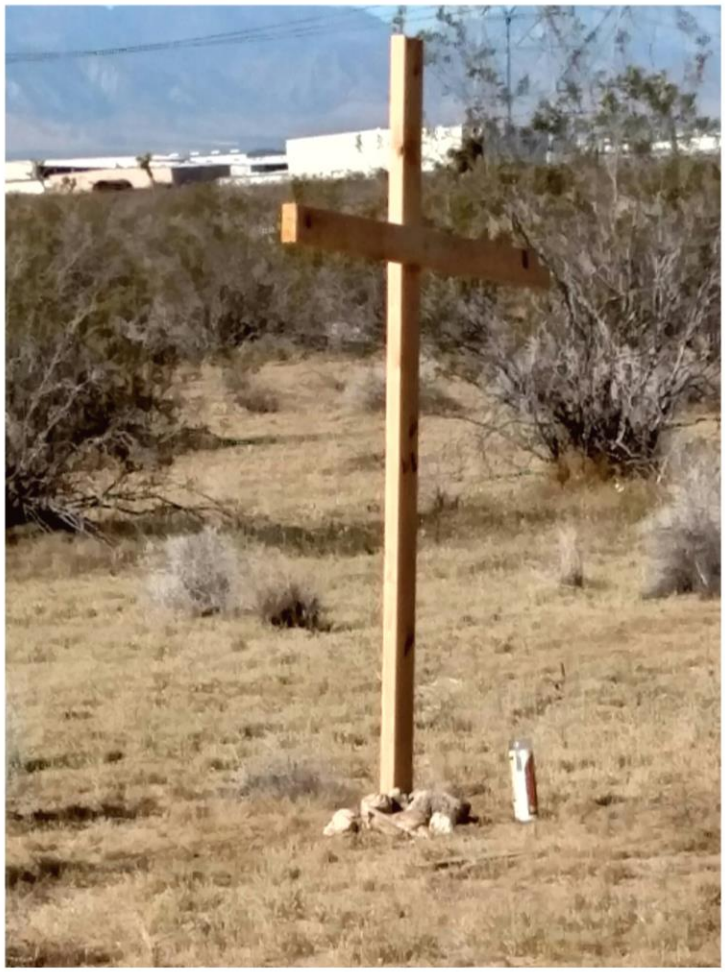

Formation Handbook

MISSIONARY SERVANTS OF THE MOST HOLY TRINITY

Vocation Development Committee | November 2015

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 Specific Curriculum for the 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 historical context 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 school 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. Formation of Missionary Servants, limited to clerical and diocesan formation is not viable. 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 cultivated by the quality of our fraternity, among the poor and abandoned and the proclamation 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 its 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]

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 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. Also, the Congregation has taken the step of accreditation before Praesidium. This agency has established clear standards that require compliance in order to be accredited as a safe and secure for minors and vulnerable persons[2]. 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 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 that is his responsibility. In a similar way, each director has a profile and role that corresponds to the stage of formation under his direction.[4] 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*

[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.
[2] See Appendix VI, Standards of Accreditation
[3] See Appendix V, Required Documents, VII Sex Abuse policy and VII Internet Policy.
[4] Profile and role are found in the corresponding chapters of each stage of formation.

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 (RL 3) we want to respond to each challenge with the entirety of our lives. Our Rule of Live tells us: *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:

Our vocation and identity is that of a religious, of men of faith that have left everything in order 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).

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 that each stage of formation make manifest in a concrete manner this shared identity.

In terms of our identity, we also recognize in thanksgiving our growth as an international and multicultural congregation. This identity is a reflection of our members and also of our field of mission. There is a need to promote maturity, membership and ability in order 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, in order to participate in the formation program of the Missionary Servants.

II. OJECTIVES 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 for 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 not only in terms of what has been inherited, it also includes the way the charism of the Congregation is renewed with each new member and 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 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 of all 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, in particular, 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. It is in this context that discernment of

the will of God takes place. 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 included.

In continuity with the Novitiate, in particular 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 abilities and skills is the integrating element in the Post Novitiate. During this stage, especial attention will be given to community life in service to 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. Discernment is pastorally necessary in the apostolate, in the context of the MCF and in the exercise of leadership. We will be servants; we seek to be of service in faithful 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 MCF.

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 are: The Personal Development Plan[5], 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, there will be specific areas that will function as the 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*

[5] See Appendix, Personal Development Plan

> *… 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. Concretely, the apostolate is in service to the man in formation. The man in formation will develop the necessary discipline to balance the apostolate and other formation tasks. The apostolate is chosen in dialogue with the director of formation. The mission site supervisor needs to be clear that during initial formation, the support that the man in formation can provide cannot be full time unless it has to do with the prolonged periods of mission assignment.

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 MCF will participate in these moments of formation.

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

> 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 was 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 in order to be able to ensure the necessary resources and corresponding supervision[6]. 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.

The mission plan and budget is 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.

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[6] Please see Appendix XI, 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 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, attentive to collaboration, especially with the laity.

A particular 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 are 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 for Each Stage

[8] See Appendix V, Required Documentation.
[9] See Appendix XII, Separation from the Program.

A. VOCATION PROMOTION. To enter the stage of Vocation Promotion as a prospect, sufficient 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. In the course of this stage the necessary requirements of cannon law and of the Congregation are gathered (RV 40)[10]. Vocation 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 Director[11], the prospect becomes a member of the prenovitiate. The prenovitiate stage adapts itself to the reality of each of the students[12]. The prenovitiate is a cenacle designated by the Congregation where an adult environment, proper for disciples of the Lord. It is not properly a house for religious, but indeed a house where community life and discernment towards religious life takes place. The particular 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

[10] The corresponding chapter will provide a list of the requirements and in the corresponding appendix the norms for retention of documents will be provided.
[11] The Vocation Promotion prospect file is transmitted to the Prenovitiate.
[12] Students come from different cultures and different degree of academic preparedness.

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 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.

C. NOVITIATE. It is the General Custodian with his Council that reviews the petition for entry into the novitiate, the recommendation of the Prenovitiate Director, the recommendation of the VDC Director, the student file[13] 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 in terms of the five areas of formation. These formal evaluations are presented to the VDC Director who in turn transmits them 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 Post novitiate stage. 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 the 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 and by way of the evangelical counsels to a life as a religious, a Missionary Servant of the Most Holy Trinity.

Special attention will be given to the moments of transition, renewal of vows, mission year and according to case, ordination to the diaconate and priesthood. Participants in the

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

discernment process include the General Custodian, the VDC Director, the Post Novitiate Director and the formation team[14]. 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.

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 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.

We celebrate the transition of an individual in the movement from one stage in the Formation Program to another. In doing so, it is not just the individual that is engaged in the transition but the entire Congregation that is renewing itself with each new member. We recognize with gratitude the labor of each director and the trust that the Congregation has bestowed upon him. The quality of the relationship between the directors, especially the respect for each other's ministry, is of great significance.

All the while, 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, more and more in order to become more and more of Christ and his mission.

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. A celebration, in the intimacy of the

[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.

Congregation and the Missionary Cenacle Family, becomes a commitment of loving service by the Church to those most in need.

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 or even that of popular culture such as New Age. A clear perspective and a sound balance are essential: The importance of one's family is not diminished, nor the need to leave family behind in order 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 by insisting on the preeminence of Final Vows.[15]

[15] Please review Appendix X, 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 that the person needs to have at least the capacity for the following profile:

+ 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 a 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.

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, they will be accompanied and the discernment necessary will take place in order 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 Church[16], 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 most poor and abandoned.

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. 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[17].

[16] Church documents to be presented, Baptismal and Confirmation certificates (Can 645, n 1).
[17] 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.

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.

4. Good physical and mental health. Psychological, physical, eye and dental exams are required. These reports are necessary in order 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.

6. Academic aptitude. Academic aptitude is taken into account 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 of origin, but also in terms of the particular circumstances within the country. It is also very important to be attentive, to the degree possible, if it has to do with a 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[18].
c) In Costa Rica, 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

[18] Economic circumstances might have impeded academic preparedness.

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 Director[19].

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

9. 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[20] without limiting the norms established by Cannon Law (Can. 265-272) and Congregational norms[21].

10. Converts[22] 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.

11. Persons who have mental illness may apply for entry into the Program but they require special attention to their discernment process and in particular 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.

12. 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.

13. 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.

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[19] There are precedents. The Congregation assumes portion by portion of the debt until Final Vows. Ex
[20] A person is not considered fully initiated into the Congregation until Final Vows.
[21] Please see Appendix XIII for process (January 2016).
[22] Persons who have recently been initiated into the Church or persons who have recently returned to the sacramental life of the Church.

14. 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.

15. Persons who have had a marital relationship will be considered for admission into the Program of Formation, according to case[23].

16. 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, legal, the Congregation's commitment to be a safe and sound place for minors and the Congregation's responsibility before agencies such as Presidium.

17. After having fulfilled all the requirements to petition admission into the Program of Formation, 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 Vocations Director of the country that will be receiving the prospect.

18. Regarding the case of English speaking persons from outside of the American continent who initiate communication via the Internet. These persons will be referred to the Vocations Director of the United States or his assistant delegate. It is important to note that the process that has been established does not contemplate offering an entry visa into the United States upon initial contact or petition.

19. The Congregation's as well as the VDC retention of documents policy[24] is to be followed with diligence. There will be complete safeguard of the privacy of all petitioners and members of the Congregation.

[23] e.g. Married in or outside of the Church, widowed, family responsibilities.
[24] See retention policy appendix.

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 and 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.

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 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.

In an adult environment the values of followers of Jesus, members of the Church and of persons who are definitely 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 personal history, specific areas of human development will call for attention. Personal history is one of those areas that takes on particular 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 strive to arrive at some ideal of perfection. What is to be sought is openness to growth and integration. This, in turn, contributes to the capacity to make decisions in freedom and make of 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, is able to enter into relationship with ease with persons of diverse cultures, diverse ages and men and women and individuals with different sexual orientation.

Community. Religious Life is constructed in terms of love of God and neighbor[25]. 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 witch 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 mission[26].

[25] See Luke 10:25-37
[26] RL 8

Spirituality. The prenovice receives instruction on Cenacle spirituality, by its very nature, an apostolic spirituality. It has to do with community life that becomes a context for a personal relationship with the Lord, a devotional knowledge is nurtured in terms of the mysteries of the Trinity, the Holy Spirit and the Incarnation. The spirituality that the student brings with him into the Program cannot be aggrieved. It is gathered and placed within the Missionary Servant spirituality such that an integration of one into the other takes place. In the personal, what is Missionary Servant is discovered and in what is Missionary Servant, the personal is uncovered.

This spirituality is nurtured by prayer, the Eucharist, the apostolate and the constant search for and the doing of the will of God. In the house schedule the times for these moments of grace will be provided. Besides the necessary support of instruction, access to spiritual direction and the sacrament of reconciliation will be available[27].

Academic. The context of mission in service to the most poor and abandoned and the formation of apostles requires a solid academic foundation. In the prenovitiate the academic formation takes place is schools approved by the Congregation. It is important to point out that 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. A good example of this 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 be learned by native Spanish speakers as well as the learning of Spanish by native English speakers.

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 Prenovitiate 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 allow for a realistic motivation, a concrete prayer life and an apostolic effort that will not be confused by erroneous motivation, including assistencialism.

[27] 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. To transition from one phase to another is not automatically 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 meetings 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 also 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 a particular aspirant[28].

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.

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

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.

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 made manifest by being well grounded and an emotional maturity that recommends him for the novitiate.

During this phase attention will be given to the next 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 of all, 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.

4. Places for mission and apostolate are an important resource, especially when members of the MCF are included.

5. Members of the MCF.

6. Documents and the like that is specifically Missionary Servant.

7. 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.

8. Skills and strategies specific to this ministry such as interreligious gatherings, the Personal Growth Plan, etc.

9. 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 particularly attentive to a disposition that will allow an encounter 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, but it is clearly dedicated to that disposition that the encounter 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 self-knowledge of 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, a safe and secure context is created that permits an abundance of self-knowledge. Along with appropriate support, in the novitiate attention continues to be given to the themes of: family of origin, sexuality, interpersonal relationship, pastoral leadership, aggression and conflict.

Novitiate Structure

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 in general and the vocation of a Missionary Servant of the Most Holy Trinity in particular. It is important to note that this 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. This reflection offers a yes or a no in terms of a future as a Missionary Servant. However, this is not enough, the outcome of the reflection needs to find a congruent action. This reflection will 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 phase of instruction is given direction 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 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, 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 looks to be on level with 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 well disposed 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 confronting 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 upon 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 comes to a close with the proximate preparation for First Profession of Vows with an eight-day retreat.

Resources:

1. First of all, 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 is 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. During this last stage the student, now a professed brother, will be accompanied with diligence such that his vocation as a religious and his apostolic zeal are fortified. During this stage, preparation for the mission field is specific to either the Brother or the priest.

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 grated 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. 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 proper necessity of academic preparedness. The studies that will prepare the Brother will be identified in the context of mission. It 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 Brother will need for the sake of the mission will be identified as well as the centers of study that he will need. This may require that the Brother's residence be another Cenacle outside of the post novitiate.

In terms of the formation of a religious priest, more than simply satisfying the canonical requirement for ordination, preparation is needed for 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 in other courses outside of the academic campus as necessary is to be expected.

As religious there are clear expectations in terms of participation in exercises and spiritual practices as indicated by the Rule of Life. All the while, this area of spirituality receives specific attention in terms of the person as well as the specific mission of Missionary Servants of the Most Holy Trinity: *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 builds on the previous. All the while, in the post novitiate, it is to be

noted that the professed is more and more proactive in his formation process. This has to do with an appropriation of the processes and values that will not have to depend on the Formation Program once the person is on mission full time. This is especially significant in the area of community. The sense of belonging and personal responsibility for the future of the Cenacle is paramount.

Structure of the Post Novitiate

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

First Renewal of Vows. The first stage is the period of time 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)[29]. Giving due attention to Canon Law guidelines (c 655-657), we note that our

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

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.

Ordinarily, the Mission Year takes place after the second renewal of vows and concludes with an eight-day retreat. This is to be a full time mission experience in works of the Missionary Servants. A characteristic of the mission site is that it challenge and stretch the man in temporary profession, even beyond what might be considered ordinarily difficult. In the case of a Brother, it will be important that the Mission Year be dedicated to works that are specific to a 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, with special attention to the Brother's vocation.

Each mission assignment requires a tool for reflection and discernment, a Mission Covenant. For the Mission Year, this is particularly important. It has to do with a process of discernment that brings together the Brother, the director of the post novitiate and the mission site director. The end result of this discernment process is precisely the development of the Mission Covenant for this most important year[30].

[30] See Appendix IX Mission Year Covenant

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 visas in order to travel outside of country. By taking this step, the student becomes 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.

Ordinarily, during this second year, the professed petitions of the General Custodian the institution of the ministries of Lector and Acolyte. The petition is made in written form, after prayer and the counsel of the spiritual director and the director of the post novitiate.

A final stage of the Post Novitiate is the period of approximately one year immediately prior to Final Vows. This is a year that carries the constant accent of integration. The entire initial formation process is coming to a close and discernment with a closer dialogue with the General Council takes place in preparation for full time ministry as a Missionary Servant.

Preparations for a thirty-day retreat, fulfillment of academic requirements, identification of the site for the celebration, the gathering of all pertinent documents and other 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 vows 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 Council[31].

[31] See Appendix, 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, taking into account 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.

Appendix

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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 used to encourage and evaluate.

This plan should be clear, specific, measurable, and realistic. It should flow from discussion and/or reports from any and all of 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 for the future. Find a quiet prayerful place.
2. Reflect on the questions in each of the areas of formation found on the accompanying sheets.
3. Write down the priority needs that occur to you as the result of this reflection.
4. Select from this list of priority needs one or two from each section you wish to address in this personal growth plan.
5. Develop a plan for each of the selected needs. Your plan should include:
   - A statement of your objective expressed in terms that are clear, specific, and realistically attainable within a specified period of time.
   - Some initial reflections on resources and means by which your objectives can be pursued.
   - An attempt at scheduling i.e. how you can introduce your project to your routine.
   - Date for evaluation.
6. Write out the total Personal Growth Plan using the model format.

Provide a copy and enter into discussion with your Formation Director and Spiritual Director. After feedback, finalize the growth plan and have the director(s)s sign with you.

Areas of Formation

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.

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.

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. <u>Apostolic Spirit.</u> 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.

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 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.

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. How do you participate in community meetings? What do you listen for?
7. Are your needs for intimacy being met in some ways in community? Are these needs appropriate?
8. 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?
9. Do you feel like you belong to the community? In what ways?
10. How does and can community support you for your apostolic service?
11. 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 enter into dialogue with the world from the perspective of the Reign of God.

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 well being 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.

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. Are you aware of any addictions?
8. 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 committed and sense of being called by God to be a Missionary Servant of the Most Holy Trinity. This sense of commitment is seen as something that is evolving but is evident in word and deed. It is present to the degree that it offers a promising sense of potential for his future life.

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 for: _____

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.

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. According to 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. 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. 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. 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 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 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

Contents: Transition File

1. Document retention.
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

MISSIONARY SERVANTS OF THE MOST HOLY TRINITY

Information Summary Sheet

CIVIL INFORMATION

PHOTO

Full Legal Name:

Present Address:

Phone Number: Email:

Date of Birth:

Place of Birth:

Diocese of Birth:

Languages spoken:

Social Security Number:

Driver's License Number:

Citizenship:

Passport Number:

Pertinent Immigration information:

ECCLESIASTICAL INFORMATION

Date of Baptism:

Parish of Baptism:

Diocese of Baptism:

Date of Confirmation

Parish of Confirmation:

Diocese of Confirmation:

Parish before entering the formation program:

Diocese before entering the formation program:

ACADEMIC INFORMATION

Academic standing upon entering the formation program:

High School:

Dates:

Name:

Location

College:

Dates:

Name:

Location

Degree:

College:

Dates:

Name:

Location

Degree:

College:

Dates:

Name:

Location

Degree:

FORMATION PROCESS INFORMATION

Brother or Cleric:

Mystery:

Pre Novitiate

Dates:

Place:

Novitiate:

Dates:

Place

Post Novitiate

Dates:

Place

Vows:

Place and Date

Renewals:

Place and Date

Final Vows:

Place and Date

Year of Mission

Place and Date

Ministries, Lector and Acolyte,

Place, Date and person conferring.

Diaconate:

Place, Date and Bishop

Priesthood

Place, Date and Bishop.

FAMILY INFORMATION
Parent's names, address, contact information. Pertinent information regarding parents (separated, deceased…)
EMERGENCY INFORMATION
Contact Person: Blood Type Medical History:

Appendix V: Required Formation Documents

Policy: Required Formation Documents

		Responsible
1	Summary Information Sheet	All Programs
	Vocation Promotion	
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	Vocation Director
6	Autobiography	Vocation Director
7	Letter of Recommendation for entry into the Pre Novitiate by the Board of Admissions.	Vocation Director
	Personal Documents	
8	Birth Certificate (verify names with all other documents).	Vocation Director
9	Copy of Passport(s)	Vocation Director

10	Copy of Visas	Vocation Director
11	Copy of any relevant military service documents	Vocation Director
	Copy of Driver's License (Expected before entry into Novitiate)	Vocation Director
12	Recent copy of Baptismal certificate with marginal notations and address of parish.	Vocation Director
13	Confirmation certificate	Vocation Director
14	Church Marriage Certificate if applicable	Vocation Director
	Health Care Documents	
15	Emergency Contact List	All Program Directors
16	Complete Medical Exam	Vocation Director
17	HIV Test	Vocation Director
18	Dental Exam	Vocation Director
19	Eye Exam	Vocation Director
20	Psychological Exam with recommendations	Vocation Director
21	Other Psychological studies as applicable (i.e.,Briggs)	Vocation Director

	Academic Records and Documentation	
22	High School	Vocation Director
23	College and Graduate (as applicable) especially Philosophy and Theology.	Vocation Director/Pre novitiate/Post Novitiate
	Apostolate Documentation	
24	Listing of apostolate and mission participation	All Program Directors
25	All apostolate and program evaluations/recommendations	All Program Directors
	Child Protection	
26	Criminal Background Check (Live Scan)	Vocation Director
27	National Sex Offenders Check	Vocation Director
28	Diocesan Requirement compliance	Pre Novitiate and Post Novitiate Directors
29	Presidium Standard compliance	Pre Novitiate and Post Novitiate Directors
	Legal Documents	

30	Medical Power of Attorney	Novitiate Director
31	Declaration on Remuneration	Novitiate Director
32	Declaration on Use and Usufruct	Novitiate Director
33	Last Will and Testament	Novitiate Director
34	Declaration on Burial Option	Novitiate Director
	Program Transition Documents	
35	Regarding entry into the Novitiate	Pre Novitiate Director
36	Regarding First Vows	Novice Director
37	Regarding Renewal through Final Vows	Post Novitiate Director
38	Regarding Ministries	Post Novitiate Director
39	Regarding Diaconate	Post Novitiate Director
40	Regarding Priesthood	Post Novitiate Director

Appendix VI: Praesidium Standards of Accreditation

2012 Standards for Accreditation

Standards for Prevention Standards 1 – 7

Standard 1. The Institute will screen new Candidates for membership in the Institute.

Rationale: *Screening is one of the most developed areas of sexual abuse prevention within child-serving industries. Those who sexually abuse minors 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 Candidates 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 including every state/county that the Candidate has resided in for the last ten years, and a completed national sex offender registry check.

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

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 and R2c 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

Candidates from the United States, increasing the importance of other methods of evaluation and screening that the Institute must follow in order to properly screen foreign Candidates.

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 1960's and 1970's. After that period, there is a significant drop in the number of cases.*[32] *Many attribute this decrease to major changes in seminaries and houses of formation in the 1980's, 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.

[32] 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.

Standard 3. The Institute will identify and utilize systems of support and accountability for its Members.

Rationale: *Each Institute has its own systems of support and accountability as set forth in the Institute's rule, constitutions, and statutes. Analysis of cases involving a religious as the perpetrator suggest a pattern of higher risk in those situations where the offender fell outside of the Institute's typical systems of support and accountability. By ensuring that all Members participate in systems of support and accountability, the Institute is better able to recognize potential issues early on, and possibly prevent sexual abuse of a minor.*

Requirements for accreditation:

R1. The Major Superior must be able to describe the Institute's systems of support and accountability for Members.

R2. The Major Superior must be able to demonstrate on-going adherence to the Institute's systems of support and accountability for Members.

R3. The Major Superior or his delegate must meet at least annually with each Member.

R4. The Major Superior or his delegate must maintain a record of the occurrence of the annual meeting with each Member who is in public ministry. Documentation of the content of the meeting is not required.

R5. For Members who are employed in any organization or in public ministry, the following is required at least annually in a communication with the organization in which the Member is employed or in public ministry: a) documentation of the communication in some form; and b) identification and contact information of the Major Superior.

R6. Members who are living outside of the typical systems of support and accountability for the Institute must be addressed through one of the following procedures: a) implement an individualized system of support and accountability for the Member, or b) re-engage the Member in the typical systems of support and accountability for the Institute.

R7. If neither of the options in R6 is possible, the Major Superior will use canonical procedures to encourage the Member to live within the normal systems of support and accountability of the Institute if they are available.

Clarifications:

C1. Communications with organizations occur by letter, telephone, electronic mail, facsimile or in person.

C2. Each Institute will have a written policy or protocol on support and accountability for those religious from other provinces or institutes who are residing in a house or community of the Institute.

Standard 4. The Institute will establish and publish clear policies for boundaries with minors.

Rationale: *Clear policies set the stage for safe environments. They establish standards within the Institute, guide Member conduct, and facilitate the identification of high-risk situations and interactions. All child-serving industries are accountable for this key component of sexual abuse of minors risk management.*

Requirements for accreditation:

R1. Policies for boundaries with minors must identify those interactions which the Institute prohibits for Members under all circumstances, including interactions via electronic communications and social media.

R2. Policies for boundaries with minors must identify positive forms of affection and demonstration of pastoral care that would be appropriate for Members under most circumstances.

R3. Policies for boundaries with minors must clarify what would constitute appropriate social interaction with minors, including those who are part of the Member's family.

R4. Each Member and Candidate will sign the policies for boundaries with minors, which indicates he has read and understood the policies of the Institute.

Clarifications:

C1. The Institute's policies for boundaries with minors are intended to guide interactions in ministry and other relationships in which the Member is acting as a representative of the Institute.

Standard 5. The Institute will educate its Members regarding the prevalence, identification, and prevention of sexual abuse of minors, giving special attention to topics that are of unique relevance to religious.

Rationale: *Effective training about the sexual abuse of minors can teach Members about their role as protectors. In addition, training about the sexual abuse of minors is designed to provide instruction to Members on how to recognize and respond to inappropriate interactions that may indicate that an adult poses a high risk to sexually abuse a minor. It also educates Members on how to monitor high-risk activities and locations and how to protect themselves and their brothers/colleagues from false allegations of sexual abuse of a minor. Training also communicates that the Institute has shown due diligence in its attempts to prevent the sexual abuse of minors, and it sends the message: "We will not tolerate any form of abuse in this Institute." All child-serving industries are accountable for this key component of sexual abuse of minors risk management.*

Requirements for accreditation:

R1. All Members who serve in public ministry, even those who only occasionally serve in public ministry, must participate in a minimum of total number of hours of education that is equal to the number of years in the Institute's accreditation period.

R2. All Members who serve in public ministry, even those who only occasionally serve in public ministry, must have at least one educational program that includes the following topics:

a. Information about both preferential and situational type sexual offenders. Warning signs of both types of offenders must be clearly stated in the materials.

b. Information regarding self-protection from false allegations of sexual abuse of a minor, including what to do if one is concerned about being falsely accused.

c. Information about child pornography, including its nature as a criminal offense and as an offense considered under the United States Conference of Catholic Bishops document, *Charter for the Protection of Children and Young People*.

d. Information regarding abuse with vulnerable adults, including its nature as an offense considered under the United States Conference of Catholic Bishops document, *Charter for the Protection of Children and Young People*.

e. Information on how to make a report to the civil authorities of known or suspected sexual abuse of a victim who is currently a minor in the jurisdictions where the Member is assigned.

R3. On-going training programs may include a variety of topics that support the prevention of the sexual abuse of minors more broadly. Approved topics include, but are not limited to, the following:

a. Appropriate boundaries in ministry with adults

b. Internet pornography and cybersex

c. Sexual harassment

d. Development of chaste celibate relationships

e. Conflict resolution

f. Preparing religious for leadership in prevention and response to allegations of the sexual abuse of minors

g. Prevention of sexual abuse in schools, camps, churches or social service organizations

h. Child-to-child sexual abuse

i. Appropriate use of electronic communications and social media

R4. The Institute will have an educational plan under Standard 5 for Members who are returning from ministry outside of the U.S. as well as for

international Members who are coming for ministry within the U.S. and who are under the authority of the local Institute.

Clarifications:

C1. If the Institute determines them to be adequate, educational programs may be provided by the organizations in which Members are employed, such as a diocese, hospital or school.

C2. Educational programs may be provided at the local, Institute or national level, but they should not be a repetition of the same program two years in a row.

C3. At the discretion of the Major Superior, a Member may be excused from the education programs addressing sexual abuse of a minor if that Member has physical or medical difficulties and will not be involved in public ministry.

Standard 6. The Institute will interrupt and intervene when a Member violates the Institute's policies regarding boundaries with minors.

Rationale: *Because suspicious or inappropriate behaviors (including boundary violations and/or policy violations) often precede incidents of sexual abuse, a swift and consistent response can interrupt potential untoward events, and help to protect minors from sexual abuse and Members from false allegations of sexual abuse of minors. Members need to know how to respond if they observe or become aware of problematic behaviors, and Institutional leadership must strive toward minimizing any barriers that would keep a Member from acting on those concerns. A written policy will help ensure that such situations will be managed consistently.*

Requirements for accreditation:

R1. The Institute must state in writing the process by which a Member should respond when another Member allegedly violates policies regarding boundaries with minors.

R2. The Institute must state in writing who is responsible for responding to concerns about policy violations regarding boundaries with minors.

R3. All Members must be provided with the process by which a Member should respond when another Member exhibits warning signs, and information about who is responsible for addressing concerns.

R4. The person identified as responsible for addressing concerns must document the inappropriate behavior and the steps taken for intervention. Documentation must be maintained in a manner that is helpful for future Major Superiors and those who will have official responsibility for the Member.

R5. When a Member has repeated boundary violations with a minor or a minor is known to be in danger, that situation must be presented to a review board, an intervention plan must be developed which outlines how the boundary violations with minors will be interrupted, and the Institute will verify that the intervention plan has been implemented.

R6. The Institute shall immediately intervene in situations where there is potential risk of harm to an identifiable minor.

Clarification:

C1. The Major Superior determines if a boundary violation with a minor has occurred.

Standard 7. The Institute will offer to provide support and assistance to any Member who discloses to leadership concerns about his own attraction to minors or about potential boundary violations with minors.

Rationale: *Members need the assurance that if someone is struggling he will receive compassionate support and appropriate resources to restore his health. How leadership manages these situations sets an important precedent that influences how likely a struggling Member may be to self-disclose.*

Requirements for accreditation:

R1. A Member who discloses concerns must be offered responsible assistance by the Institute which includes, but may not be limited to, appropriate evaluation and/or treatment.

Clarifications:

C1. It is recognized that information revealed during the Sacrament of Reconciliation is under the seal of confession and is inviolable under Canon Law.

C2. It is recognized that the information revealed may be privileged from disclosure under Canon or Civil Law, for example, during a manifestation of conscience or spiritual direction[33], or by the attorney/client privilege.

Standards for Responding — Standards 8 –18

Standard 8. Representatives of the Institute will respond pastorally and compassionately to any person who alleges sexual abuse of a minor by a Member of the Institute.

Rationale: *The Member Institutes of CMSM have publicly committed to ". . . have in place the mechanisms to respond promptly to any allegation of sexual abuse."[34] Many victims/survivors have reported that being received pastorally and having an opportunity to share their story enhanced their overall ability to heal.*

Requirements for accreditation:

[33] Canon Law recognizes confessors (C. 984) and spiritual directors (C. 240, §2) as having privileged information of the internal forum which cannot be revealed in these circumstances, following the constant tradition of the Church regarding manifestation of conscience in a one-on-one relationship.

[34] From the CMSM Statement, "Improving Pastoral Care and Accountability in Response to the Tragedy of Sexual Abuse," which was voted upon and unanimously approved by CMSM membership at the August 2002 Assembly.

R1. The Institute must identify a representative, qualified by education, training or experience, to respond to those who allege sexual abuse of a minor.

R2. The Institute must document the response to all individuals who have reported since June 2002 the sexual abuse of a minor, or since the date of the Institute's last Accreditation visit.

R3. Documentation of the response to individuals who have alleged sexual abuse of a minor must demonstrate a timely, compassionate and pastoral response to that individual.

R4. When a person comes forward with an allegation of being sexually abused as a minor, representatives of the Institute will provide a guide and explain the procedure that the Institute typically follows in responding to the allegation.

Clarifications:

C1. For the purposes of this standard, "Member" includes current, former and deceased Members of the Institute.

C2. Representatives of the Institute who are responsible for assisting individuals who have experienced sexual abuse of a minor may be Members, employees, volunteers, or third-party contractors of the Institute.

C3. The Institute provides all Members with a basic procedure of pastoral response, so that they will have an understanding of pastoral response to an individual who alleges sexual abuse of a minor, and so that that the individual will be treated with respect and dignity.

Standard 9. Representatives of the Institute who are responsible for assisting individuals who have alleged sexual abuse as a minor will be educated regarding the nature of their role.

Rationale: *The Member Institutes of CMSM have publicly recognized the need to designate a competent individual to coordinate assistance for the*

immediate pastoral care of persons who claim to have been sexually abused as a minor by a Member.[35] *Indeed, the gravity and complexity of this role demands a very specific skill-set.*

Requirements for accreditation:

R1. Representatives of the Institute who are responsible for assisting individuals who have alleged sexual abuse as a minor must have education, training, and/or experience with the following content areas: a. Dynamics of sexual abuse

b. Effects of sexual abuse

c. How to provide comfort to victims of sexual abuse

d. How to encourage trust in victims who report being sexually abused as a minor

e. How to promote a victim's healing

R2. Representatives of the Institute who are responsible for assisting individuals who have alleged sexual abuse as a minor must have written guidelines for fulfilling their role.

Clarification:

C1. Representatives of the Institute who are responsible for assisting individuals who have experienced sexual abuse as a minor may be Members, employees, volunteers, or third-party contractors of the Institute.

10. Representatives of the Institute will make a significant effort to promote the healing process for individuals who allege being sexually abused as a minor.

[35] From the CMSM Statement, "Improving Pastoral Care and Accountability in Response to the Tragedy of Sexual Abuse," which was voted upon and unanimously approved by CMSM membership at the August 2002 Assembly.

Rationale: *The Member Institutes of CMSM have reaffirmed their commitment "to strongly support the five principles for dealing with situations of abuse offered by the U.S. Catholic Conference of Bishops in 1993."*[36] *The third of these five principles compels Institutes to "Reach out to the victims/survivors and their families and communicate sincere commitment to their spiritual and emotional well-being."*

Requirements for accreditation:

R1. Representatives of the Institute must offer to meet in person with an individual who alleges being sexually abused as a minor by a Member of the Institute. The purpose of the meeting is to promote the healing process, and to allow the Representatives of the Institute to understand how the sexual abuse has affected the individual.

R2. Representatives of the Institute must document every attempt to assist in the healing of an individual who has approached the Institute since June of 2002 to report being sexually abused as a minor by a Member.

Clarifications:

C1. It is recognized that some individuals who have experienced being sexually abused as minors may first approach the Institute through legal proceedings. While this situation presents difficulties for assisting in the healing of the individual, representatives of the Institute must still offer to meet with the individual who alleges being sexually abused as a minor.

C2. While it is the sincere desire of all Institutes to meet and assist all who claim to be victims of sexual abuse as a minor, they understand that when a victim of sexual abuse is represented by legal counsel these direct opportunities become limited. However, every Institute will, through a victim's legal counsel, extend an offer to meet or assist the victim with healing.

[36] From the CMSM Statement, "Improving Pastoral Care and Accountability in Response to the Tragedy of Sexual Abuse," which was voted upon and unanimously approved by CMSM membership at the August 2002 Assembly.

C3. It is understood that some individuals who allege having been sexually abused as minors may choose not to accept a meeting with representatives of the Institute.

C4. It is recognized that some unusual circumstances may cause a meeting, or even an offer of a meeting, with an individual who has alleged being sexually abused as a minor to be impossible. The Institute is asked in these cases to document these circumstances and any alternative form of pastoral assistance that has been offered.

11. The Institute will adhere to written protocols for responding to reports and allegations of sexual abuse of a minor.

Rationale: *Systematic procedures for responding to an allegation of sexual abuse can protect everyone's rights, ensure that the organization responds legally and effectively, and minimize disruption. However, policies and protocols are only as effective as they are practiced. Institutes are held accountable for fulfilling what has been set forth in these policies and procedures.*

Requirements for accreditation:

R1. Written protocols are to provide guidance for

a. Responding to individuals who report sexual abuse of a minor

b. Responding to individuals who allege they have been sexually abused as a minor

c. Responding to Members who have been accused

d. Complying with reporting requirements

e. Communicating with the accused

f. Protecting the rights of all those involved

g. Conducting internal investigations

h. Working with review boards

i. Communicating with the diocesan bishop where the alleged abuse took place and where the Member is residing, as appropriate

j. Communicating with the employer of the place where the alleged abuse took place and where the Member is currently employed, as appropriate

k. Communicating with the Religious Institute, the faith community, and the public, as appropriate

R2. Written protocols are to identify who, by role, is responsible for each part of the response to allegations of sexual abuse of a minor.

R3. The Institute will document adherence to written protocols for responding to reports and allegations of sexual abuse of a minor.

12. The Institute's policy will state the obligation of each of its Members to report to civil authorities all allegations of known or suspected sexual abuse of a victim who is currently a minor.

Rationale: *In most circumstances, Members are mandated, as clergy or as professionals in a child-serving organization, to report sexual abuse or suspicion of sexual abuse of a minor. Reporting sexual abuse regardless of individual state statutes demonstrates the Institute's commitment to stop sexual abuse and to help seek justice for victims/survivors.*

Requirements for accreditation:

R1. Members must report to appropriate civil authorities all known or suspected sexual abuse of a victim who is currently a minor, whether alleged to have been perpetrated by a Member or by a non-Member.

R2. Members must report to appropriate civil authorities known or suspected possession, distribution, downloading and/or intentional viewing of real or virtual child pornography.

R3. Members must be educated in their obligations under the Institute's policy that they must report to civil authorities all allegations of known or suspected sexual abuse of a minor, regardless of the civil mandatory reporting laws of the jurisdiction.

Clarifications:

C1. It is recognized that information revealed during the Sacrament of Reconciliation is under the seal of confession and is inviolable under Canon Law.

C2. It is recognized that the information revealed may be privileged from disclosure under Canon or Civil Law; for example, during a manifestation of conscience or spiritual direction[37], or by the attorney/client privilege.

C3. Child pornography is a graphic sexually explicit depiction of a minor and is considered sexual abuse of a minor.

C4. Reporting of actual or suspected sexual abuse of a minor is the responsibility of the one who has knowledge of the sexual abuse of a minor or of the criminal activity in regard to the acquisition and/or use of real or virtual child pornography.

13. The Institute will report known or suspected sexual abuse of a minor by a Member when the victim is no longer a minor, as obligated by the civil laws of the state where the sexual abuse of the minor allegedly occurred.

Rationale: *This standard again demonstrates commitment to assisting all victims/survivors to heal and helping them to seek justice. The standard for the Church in the United States is that in every instance the Institute will advise and support a person's right to make a report to civil authorities.*[38]

Requirements for accreditation:

R1. All individuals who have approached the Institute since June of 2002 to report the sexual abuse of a minor must be advised of their right to report to civil authorities and encouraged to make a report.

[37] Canon Law recognizes confessors (C. 984) and spiritual directors (C. 240, §2) as having privileged information of the internal forum which cannot be revealed in these circumstances, following the constant tradition of the Church regarding manifestation of conscience in a one-on-one relationship.

[38] From the *Essential Norms for Diocesan/Eparchial Policies Dealing with Allegations of Sexual Abuse of Minors by Priests or*

Clarifications:

C1. For the purposes of this standard, "Member" includes living current and former Members of the Institute.

14. The Institute will investigate all reports and allegations of sexual abuse of minors by a Member to the extent possible, based on the information provided.

Rationale: *Investigations of allegations of sexual abuse of a minor are conducted in order to respond properly to individuals who may have experienced great harm and to preserve the right of due process for any Member who has been accused of abuse. Therefore, all allegations, including anonymous allegations, should be taken seriously. Lack of an investigation may jeopardize the safety of a child, the rights of a Member, and the functioning of the Institute.*

Requirements for accreditation:

R1. All information that is provided to the Institute must be investigated to the extent possible, including information that is provided anonymously.

R2. The Institute must have in place written procedures for investigating reports of sexual abuse of a minor by its Members.

R3. An investigation must be done by trained individuals who will produce a written report.

R4. All allegations of sexual abuse of a minor reported since June of 2002, or since the last Accreditation site visit, must have a) a documented investigation, or b) documentation of the reason(s) an investigation is not possible or is not necessary.

Clarifications:

C1. Internal investigations may be carried out by trained individuals who are Members, volunteers, employees or independent third-party contractors of the Institute.

C2. 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.

C3. For the purposes of this standard, "Member" includes current, former and deceased Members of the Institute.

15. The Institute will cooperate with civil authorities that are conducting an investigation of an allegation of sexual abuse of a minor.

Rationale: *The professional standard of care holds that the Institute will "comply with all applicable civil laws with respect to reporting of allegations of sexual abuse of minors to civil authorities, and will cooperate in their investigation."*[39]

Requirements for accreditation:

R1. The Institute will cooperate with investigations of its Members by civil authorities.

R2. The Institute will consult with civil authorities when its own internal investigations occur concurrently with a criminal investigation.

Clarification:

C1. Institutes are expected to respect each Member's rights under civil and canon law.

16. The Institute will document all reports and allegations of sexual abuse of minors by a Member and its responses to the reports and allegations, including anonymous allegations and reports.

Rationale: *Maintaining thorough documentation of the Institute's response to allegations enables the Institute to demonstrate due diligence and creates an "Institutional memory," or record for subsequent leadership.*

Requirements for accreditation:

[39] From the *Essential Norms for Diocesan/Eparchial Policies Dealing with Allegations of Sexual Abuse of Minors by Priests or*

R1. Representatives of the Institute must document all reports and allegations of sexual abuse of a minor by Members, including anonymous reports and allegations which have been made since June of 2002, or since the last Accreditation site visit.

R2. Representatives of the Institute must document the Institute's response to the reports and allegations of sexual abuse of a minor by Members.

R3. Documentation of allegations, reports and responses concerning the sexual abuse of minors must remain accessible to the Major Superior and his successors.

R4. The Institute must document that a one-time review of the personnel files of all living current Members for any possible allegations of sexual abuse of a minor has been accomplished.

Clarifications:

C1. Documentation may be submitted by designated Members or by third-party contractors of the Institute.

C2. Documentation of allegations and investigations are confidential.

C3. Access to these materials will be available on a "need-to-know-basis," or as required by civil law.

C4. Access to these materials will be prohibited as required by canon law.

C5. For the purposes of this standard, except R4, "Member" includes current, former and deceased Members of the Institute.

C6. Action on any information discovered in the implementation of R4 is subject to the policies of the Institute.

Standard 17. The Institute will utilize a Review Board for the purpose of providing consultation to the Major Superior on the response to all reports and allegations of sexual abuse of minors.

Rationale: *The Member Institutes of CMSM have publicly recognized the need for "more accountability and transparency in how we . . . handle*

allegations of sexual abuse and follow-up outreach to victims . . .”[40] *Allowing an external, objective body to review the Institute’s efforts demonstrates transparency and provides leadership with critical “advice on all aspects of responses required in connection with these cases.*[41] *Many organizations that serve minors have bodies that function similarly.*

Requirements for accreditation:

R1. Review Boards are to meet at least annually. Review Boards consist of at least five members, with no more than two Members of the Institute.

R2. Review Boards must provide recommendations regarding the response to reports and allegations of sexual abuse of a minor by a Member that have come forward since June of 2002, or since the date of the last Accreditation site visit.

R3. When considering allegations of sexual abuse of a minor against a Member, Review Board members must be provided with the following: a) the original report or allegation of sexual abuse of a minor by a Member that was submitted to the Institute, b) the final report of an investigation, c) all other allegations of sexual abuse by that Member, and d) any relevant disciplinary actions that have been taken in the past in regard to that Member and the reasons for the actions.

R4. In cases where alleged sexual abuse of a minor by a Member cannot be investigated or established, the Review Board must provide consultation regarding the disposition of the case.

R5. Review Board members must be familiar with the following documents: the *Charter for the Protection of Children and Young People*, the *Essential Norms for Diocesan/Eparchical Policies Dealing with Allegations of Sexual Abuse of Minors by Priests or Deacons*, the 2002 CMSM *Statement of the Assembly*, the Institute’s Policies, and the CMSM *Accreditation Standards*.

R6. Review Boards will have policies and standardized operating procedures which address the following: confidentiality, constitution of

[40] From the CMSM Statement, “Improving Pastoral Care and Accountability in Response to the Tragedy of Sexual Abuse,” which was voted upon and unanimously approved by CMSM membership at the August 2002 Assembly.

[41] From the *Essential Norms for Diocesan/Eparchial Policies Dealing with Allegations of Sexual Abuse of Minors by Priests or*

the Review Board, terms of membership, records retention, how information will be disseminated to Review Board members, agreed-upon standards of operation that are considered under its procedures, and possible alternatives for the disposition of cases.

R7. The Institute must document that all allegations and reports of the sexual abuse of minors have been presented to the Review Board.

Clarifications:

C1. The Institute will provide both initial and on-ongoing training for members of the Review Board.

C2. Where appropriate, the Review Board provides consultation to the Major Superior regarding the reporting of cases to the authorities when such reporting is not required by law.

C3. Review Board meetings may be conducted in person, by conference call, or web conferencing.

Standard 18. In cases where an allegation of sexual abuse of a minor committed by a Member has been established, the Institute will inform the leadership of any organization or ministry in which the Member has admitted to, or is suspected of, having sexually abused a minor, to the extent possible.

Rationale: *Notifying organizations where sexual abuse of a minor has occurred demonstrates transparency, enables that organization to address any additional potential risk, and echoes the Institute's commitment to assist all victims/survivors heal and seek justice.*

Requirements for accreditation:

R1. The Institute will inform the leadership of any organization or ministry in which the Member has admitted to the sexual abuse of a minor, or in which the Member has an established allegation of the sexual abuse a minor.

R2. The Institute will maintain documentation concerning the Institute's communication with the leadership of the organizations and ministries in

which the Member has admitted to, or has an established allegation of, the sexual abuse of a minor, including any reasons why this communication was not possible or that the communication was deemed not feasible, if such was the case.

Clarification:

C1. The duty to report to organizations and ministries does not necessarily apply to all organizations and ministries in which the Member has served. It applies only to those organizations and ministries where the Member has admitted to, or is suspected of, having sexually abused a minor.

Standards for Supervision — Standards 19 – 25

Standard 19. The Institute will maintain a written, individualized Safety Plan to guide the supervision of any Member against whom an allegation of sexual abuse of a minor has been established.

Rationale: *Safety Plans allow the Institute to articulate and demonstrate diligence in managing the risk of Members who have sexually abused minors in the past. They often formalize and increase the consistency of risk reduction plans that are already in place. Safety Plans improve consistency during the transitions of Local and Major Superiors and provide a formal plan to which a Review Board is able to respond.*

Requirements for accreditation:

R1. The Safety Plan must include:

a. a summary of the problem behaviors, which at a minimum will detail the number of victims, and the age and gender of the victim(s),

b. information about how the Member spends the majority of his time,

c. any applicable sex offender registry requirements, including parole and probation,

d. a summary of the Member's risk assessment and the risk-reduction strategies, including as appropriate 1) limitations on the Member's access to minors and how any such access is supervised, 2) issues of personal relationships with friends and family, to ensure that the Member does not have unsupervised access to minors, 3) monitoring of the Member's use of electronic communications, social media and internet access, and 4) issues of financial accountability.

e. the person responsible for the implementation of each risk-reduction strategy,

f. consequences for non-compliance with the Safety Plan,

g. dates on which the Safety Plan has been reviewed by the Review Board.

R2. The Safety Plan will be signed by the Member, the Major Superior and at least one individual who is directly involved in the supervision of the individual.

R3. The Safety Plan is implemented by the Institute and the Member understands the consequences for non-compliance with the Safety Plan.

R4. Within thirty (30) days of implementation, the accrediting agency must be informed of a new Safety Plan for a Member who is determined to be a "High Risk" offender.

Clarifications:

C1. If the Member chooses not to sign the Safety Plan, this should be documented.

C2. Distributing, downloading, or intentionally viewing child pornography of any kind is sexual abuse of a minor according to both civil and canon law. Any individual who has engaged in these behaviors must have an individualized Safety Plan.

C3. Due regard must be given to the need for any Member who has a Safety Plan to authorize the release of any confidential information to the members of the Review Board.

C4. All Members who have an established allegation of sexual abuse a minor, including men who are in a residential treatment center or who are on parole/probation, are required to have a Safety Plan.

20. When the sexual abuse of a minor by a Member has been established, the Member will not be permitted to work in any position which allows access to minors, or in any ecclesiastical ministry, in accordance with the *Essential Norms for Diocesan/Eparchical Policies Dealing with Allegations of Sexual Abuse of Minors by Priests or Deacons.*

> **Rationale**: *As stated above, this standard comes from the Essential Norms for Diocesan/Eparchical Policies Dealing with Allegations of Sexual Abuse of Minors by Priests or Deacons and the Charter for the Protection of Children and Young People, which CMSM membership voted unanimously in August 2002 to recognize.*[42] *The Essential Norms state that "When even a single act of sexual abuse of a minor by a priest or deacon is admitted to or is established after an appropriate process in accordance with canon law, the offending priest or deacon will be removed permanently from ecclesiastical ministry . . ."*[43]

Requirements for accreditation:

R1. Appropriate work for a Member who has sexually abused a minor must be determined in consultation with the Review Board and, when appropriate, the local bishop.

R2. Appropriate work, and the specific assignment, for a Member who has sexually abused a minor must be documented in the Safety Plan of the Member.

Clarifications:

C1. For the purposes of Accreditation, "ecclesiastical ministry" is defined as any ministry under the authority of the diocesan bishop.

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[42] From the CMSM Statement, "Improving Pastoral Care and Accountability in Response to the Tragedy of Sexual Abuse," which was voted upon and unanimously approved by CMSM membership at the August 2002 Assembly.

[43] From the *Essential Norms for Diocesan/Eparchial Policies Dealing with Allegations of Sexual Abuse of Minors by Priests or Deacons*, 2006 revision.

C2. A Member who has sexually abused a minor will not be permitted to work in a parish or school.

21. The Review Board will review each Safety Plan at least annually and offer recommendations to the Major Superior.

Rationale: *The Member Institutes of CMSM have publicly recognized the need for "more accountability and transparency in how we . . . handle . . . supervision of our Members charged with abuse."[44] Annual consideration by the Review Board of Safety Plans is a critical function of the Board, as it demonstrates transparency with regard to how the Institute is managing the risk of its Members who have sexually abused minors. Reviewing all existing Safety Plans at least annually also creates a venue for considering the appropriateness of current risk management strategies and the overall effectiveness of each Safety Plan.*

Requirements for accreditation:

R1. The Review Board must review each new Safety Plan in a timely manner after the Safety Plan's development.

R2. The Review Board must review each existing Safety Plan at least once each year.

R3. The Review Board must receive a report of compliance annually. The report must include the Member's overall response to the Safety Plan and information about any violations of the Safety Plan.

R4. The Member, his Local Superior and the Safety Plan Supervisor must be given timely notice of the Review Board meeting and invited to submit information for consideration and requests for modifications of the Safety Plan.

R5. The Review Board must document any recommendations offered to the Major Superior, either in their annual report or in some other memo/minutes.

[44] From the CMSM Statement, "Improving Pastoral Care and Accountability in Response to the Tragedy of Sexual Abuse," which was voted upon and unanimously approved by CMSM membership at the August 2002 Assembly.

22. Individuals who supervise Members who have Safety Plans will be physically and emotionally capable, and adequately trained to perform the duties involved in supervision.

> **Rationale**: *Careful consideration should be made with regard to who can be most effective in the role of supervisor. Supervisors need clarity about the expectations of the role, including how to manage non-compliance. Due regard should be given to the level of risk posed by the Member under supervision and the ability and availability of the supervisor to effectively fulfill the role.*

Requirements for accreditation:

R1. Individuals who supervise must receive written guidelines regarding their role and procedures for supervision, including how to respond if the supervised Member violates his Safety Plan.

R2. Individuals who supervise must be provided with training regarding their responsibilities.

R3. Individuals who supervise must not have physical or emotional disabilities that prohibit their fulfillment of the function of supervision.

Clarification:

C1. Supervision of Members who have Safety Plans may be conducted by qualified Members, employees, or third-party contractors of the Institute.

C2. When the supervision of a Member on a Safety Plan is managed primarily by a Member of the Institute, the other assignments of the Supervisor must not interfere with the responsibility of supervision.

23. Those who supervise Members who have Safety Plans will have access to all pertinent information about the Member that is not otherwise privileged.

> **Rationale**: *A supervisor can only be effective if s/he has a comprehensive understanding of the history of the Member's problem behaviors, is aware of the budding signs of the Member's "red-flag" behaviors, and knows the circumstances under which the Member has acted out in the past.*

Requirements for accreditation:

R1. Individuals who supervise must have adequate information to fulfill their duties to supervise, which may include the following:

a. Relevant history of sexual abuse of a minor

b. All allegations of sexual misconduct, including those with adults

c. History of compliance with Safety Plans

d. Current progress in treatment, if applicable, or information about treatment completion

e. History of substance use and/or abuse, if applicable

R2. Individuals who supervise must be provided with written instructions regarding documentation that must be maintained to verify compliance.

Clarifications:

C1. Due regard must also be given to the Member's civil and canonical rights regarding the authorization of the release of any confidential information to individuals involved in supervision

C2. Pertinent information may also include treatment records or summaries, evaluation results, psychological evaluations or personal histories, with appropriate limited waivers of release.

24. The Major Superior or his delegate will annually evaluate compliance with all Safety Plans.

Rationale: *The Safety Plan should be a living document. Reviewing it at least annually creates a venue for considering the appropriateness of current risk management strategies and the overall effectiveness of the Safety Plan.*

Requirements for accreditation:

R1. The Major Superior or his delegate must evaluate and document compliance with Safety Plans at least once each year.

R2. Institutes must develop protocols for routine documentation of compliance with Safety Plans.

R3. If a Member who is currently on a Safety Plan experiences any significant change in behavior, or a new allegation surfaces, his Safety Plan must be reviewed as soon as possible by the Major Superior. Any adjustments made to the Safety Plan for managing risk must be communicated to the Supervisor and Review Board immediately.

25. Communities that house "high-risk" Members will be visited by outside auditors on an unannounced basis to ensure consistent implementation of Safety Plan protocols.

Rationale: *This standard publicly demonstrates the Institute's commitment to the protection and safety of minors and the supervision of high-risk Members.*

Requirements for accreditation:

R1. The Institute must determine the level of risk for each of its Members who have an established allegation of the sexual abuse of a minor and are on a safety plan.

R2. Communities that house high-risk Members must be visited by outside auditors on an unannounced basis at least once a year.

Clarifications:

C1. The Institute, in cooperation with its own treatment providers or other experts, will be responsible for identifying its High-Risk Members. The level of risk should be determined either through a professional risk assessment or through a review of behaviorally-based indicators.

C2. Visits will be documented by auditors.

C3. Institutes who are found to be out of compliance with the Safety Plan for a high risk individual must be re-visited within the next 30 days.

C4. Continued non-compliance with Safety Plans will result in the loss of Accreditation.

GLOSSARY OF TERMS

Allegation. A first-person accusation of sexual abuse of a minor brought against a current Member, former Member, or deceased Member which is reported to the Institute through any form of communication, including any that are anonymous.

Candidate. An individual who is applying for membership in an Institute.

Child Pornography. Any activity which involves a graphic depiction of a minor that is sexually explicit.[45]

Confidential. Private information which shall be kept restricted from others and only be disclosed to an authorized person for legitimate reasons of the Institute or because the disclosure is legally required.

Confidential Documents. Documents which are given confidential status as defined by the Institute in its policies and procedures and as required by canon and civil law and whose confidential status has been communicated to the Members of the Institute.

Established Allegation. Based upon the facts and the circumstances, there is objective certainty that the accusation is true and that an incident of sexual abuse of a minor has occurred.

[This is a definition which keeps it in line with the concept of moral certainty required by canon law. The judgment of the Major Superior must be objective, i.e. based upon facts and circumstances discovered in the course of the investigation. It is not based upon a percentage of the evidence, i.e. *most likely true* or *most likely occurred*, which implies 50 + 1% of the evidence. It allows for the canonical principle within moral certitude which states that the judgment of the Major Superior admits that the contrary (the falsity of the accusation) is indeed possible but highly unlikely or improbable, to the extent that the Major Superior has no fear that the contrary (the falsity of the accusation) may be true.]

High-Risk Member. A Member who has sexually abused a minor in the past and is likely to sexually abuse a minor again if left untreated and/or unsupervised.

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[45] From a presentation given at the USCCB **Promise to Protect** seminar on September 13, 2007 by Kenneth V. Lansing, which was adapted from his work, *Cyber "Pedophiles": A Behavioral Perspective*, Chapter 4 of **Prosecuting Internet Child Exploitation Cases** (James S. Peters ed., US Department of Justice, USA Book): "The legal definition of the term "child pornography" varies from state to state and under Federal law. Under most legal definitions, child pornography involves a **visual depiction** of a **child** that is **sexually explicit**. The Federal child pornography law defines a child (minor) as someone who has not yet reached his or her 18th birthday."

Institute. The individual religious province, association, monastery, abbey, congregation, society or order that is seeking Accreditation.

Major Superior. The responsible leader according to the proper law of the Institute that is seeking Accreditation.

Member. A person for whom an Institute is responsible according to canon law and the proper law of the Institute.

Ministry:

Ecclesiastical Ministry. Any ministry that is under the authority of a diocesan bishop.

Public Ministry. Any ministry that is under the authority of a diocesan bishop and/or under the sponsorship of a religious institute, and/or with the permission of the Major Superior.

Minor. Anyone under the age of 18.[46]

Report. A third-party accusation of sexual abuse of a minor brought against a current Member, former Member, or deceased Member which is conveyed to the Institute through any form of communication, including any that are anonymous.

Review Board. An advisory group of individuals not employed by the Institute with unique knowledge, expertise and experience, who provide counsel and recommendations to the Major Superior in situations involving the sexual abuse of a minor.

[46] This definition of a minor reflects the stipulation of the USCCB *Charter for the Protection of Children and Young People* (revised June 2011), which states that "for purposes of this *Charter*, the offense of sexual abuse of a minor will be understood in accord with the provisions of *Sacramentorum sanctitatis tutela* (SST), article 6, which reads:

> §1. The more grave delicts against morals which are reserved to the Congregation for the Doctrine of the Faith are: 1o the delict against the sixth commandment of the Decalogue committed by a cleric with a minor below the age of eighteen years; in this case, a person who habitually lacks the use of reason is to be considered equivalent to a minor."

Risk Assessment. The prediction of the degree of possibility of re-offense for someone with a known history of sex offenses.[47]

Safety Plan. A formal, written supervision program for an individual who, it has been established, has sexually abused a minor.

Sexual Abuse of a Minor. Contact or interaction between a minor and an adult when the minor is being used for sexual stimulation of the adult. This occurs when an adult engages a minor in any sexual activity, including direct sexual contact as well as sexual non-contact, such as frottage, exhibitionism, and the distribution, downloading, and/or intentional viewing of child pornography.

[47] According to Association for the Treatment of Sexual Abusers (ATSA), risk assessment is "concerned with predicting the degree of possibility of a sexual re-offense for someone with a known history of sex offending . . . the task of risk assessment is to strike a scientific and ethical balance among the identification of offenders, while optimizing public safety."

Appendix VII: Sex Abuse Policy

Sexual Abuse Policy of the

Missionary Servants of the Most Holy Trinity

1. The Missionary Servants of the Most Holy Trinity (the Institute), a religious institute of men within the Roman Catholic Church, are men dedicated to proclaiming God kingdom through outreach to the poor and the promotion of spiritual and religious leadership roles among lay Catholic men and women, especially in their evangelizing the materially and spiritually abandoned.

2. Accordingly, with the gospel of Jesus Christ and the authentic tradition developing from it as the foundational guidelines for the behavior of the Institute's members, sexual abuse of any kind, but especially of minors, is not condoned or tolerated in any degree. Moreover, every effort should be made at every level within the Institute to prevent such abuse.

3. Sexual abuse is defined as any sexual contact, or threat of such contact, with a minor, or any nonconsensual sexual contact with a person of any age.

4. All accusations of sexual abuse will be taken seriously, will be investigated, and will be reported to civil authorities, according to the requirements of each civil jurisdiction. When an accusation is made in the context of diocesan sponsored work, parochial or non-parochial, diocesan authorities will also be informed and, when deemed appropriate, their participation in the investigation will be sought. Even when the accusation is made independent of diocesan work (e.g. in an institutional residence), diocesan authorities will ordinarily be informed of the situation.

5. When any accusation of sexual abuse is deemed initially credible, even before a fuller investigation by civil and/or Institutional authority, immediate concern – pastoral, psychological, and personal -- will be shown to the victim of the accusation, especially when such a victim is minor.

6. Initial credibility of itself ordinarily will be sufficient for the dismissal of those in candidacy programs and novices. In cases involving a member in temporary vows, initial credibility will ordinarily be sufficient for not allowing the accused to proceed to perpetual vows.

7. The General Custodian (superior general) is primarily responsible for the investigation of all accusations, though he may at any stage of the process, delegate the responsibility to any member or members of the Institute.

8. A consultative board, made up of non-members of the Institute, will be in place for consultation on the matter when this is deemed appropriate.

9. A member who has been accused of sexual abuse of a minor will immediately be removed from duties that, in cases where a minor is involved, would put him in any proximity to minors. He will be forbidden all association with all minors or with adult victim accusers until the matter is resolved. In all of this, fraternal charity will be observed.

10. The civil and ecclesiastical rights of both parties, the accusing victim and the accused, will be respected in this entire process, as well as the right to privacy, to the extent that the circumstances and the law allow.

11. In cases where an investigation has determined there is a lack of credibility to the accusation, the member shall be reinstated to his former position where this is feasible. Both accuser and accused shall be treated with charity, and efforts shall be made to promote forgiveness and reconciliation.

12. When an investigation, by civil and/or Institutional authority, has determined that the accusation of sexual abuse is valid:

    a. The victim and the perpetrator shall be immediately informed of the finding.

    b. After consultation with the victim and his/her parents, and with other appropriate persons (e.g., above mentioned consultative board, legal advisors), steps shall be taken toward healing the victim's wounds and, if possible, toward reconciliation. The General Custodian or his delegate should follow up, though appropriate inquiry and action, with concern and care for the victim.

    c. Besides whatever civil penalties may be imposed, the perpetrator, in cases of abuse of minors, shall be permanently removed from responsibilities within the Institute that involve working with or proximity to minors. He shall be provided with counseling/treatment for whatever rehabilitation is considered possible, though no rehabilitation will be considered sufficient

for reassignment to work with minors. If the perpetrator is not yet in permanent vows, he will not be allowed to renew his vows.

d. A record of the case, including the investigation, the conclusion, a record of civil procedures, and the final disposition, shall be kept as a part of the member's personnel record. It shall be kept private, except as and to the extent that public law demands publication, but shall be used in all future consideration of assignments within the Institute. The General Custodian or his delegate should review the matter at appropriate intervals to be assured that the requirements of civil law and the determination of the Institute in the matter are being observed.

September 2002

Appendix VIII: Internet Policy

Internet Policy

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. It is criminal to post, download, upload, store, or pass on material, remarks, proposals or comments that contain or relate to child pornography.

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 (see note below) and other norms of international law.

Note: See, http://www.fcc.gov/cgb/consumerfacts/cipa.html, The Children's Internet Protection Act (CIPA) is a federal law enacted by Congress in December 2000 to address concerns about access to offensive content over the Internet on school and library computers. CIPA imposes certain types of requirements on any school or library that receives funding support for Internet access or internal connections from the "E-rate" program – a program that makes certain technology more affordable for eligible schools and libraries. In early 2001, the Federal Communications Commission (FCC) issued rules implementing CIPA.

Appendix IX: 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 X: 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. TRANSITORY 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 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.

3. 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.

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.

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 Director of the Vocational Development Council 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 VDC Director or by his delegate.

4. The newly ordained will concelebrate their First Mass the day after their Ordination in the place where the priestly Ordination was celebrated.

5. 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.

6. 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.

7. 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.

8. 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.

General Council, June 2012

Appendix XI: 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 XII: Departure Form

Departure from Formation Program

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: _____

Place and Date: _____

This document is placed in the student file. If the departure takes place during the 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 XIII: 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.