

FORMATION OF WOMEN RELIGIOUS DURING THE PERIOD OF TEMPORARY VOWS WITH PARTICULAR
REFERENCE TO THE RELIGIOUS INSTITUTE OF THE BLESSED VIRGIN MARY (LORETO SISTERS)

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ABSTRACT

The Church instructs that the formation of religious after first profession, already begun in the novitiate, is to be perfected so that they may acquire the necessary maturity to lead the life of the institute more fully and to carry out its mission more effectively, mindful of the needs of the Church, mission of the institute and condition of people and times (c. 659 § 1).

Formation after first profession for non-clerical religious is an innovation of Vatican II. The document *Renovationis causam* recognizes the necessity and significance of post-novitiate formation in helping the temporarily professed religious attain the required growth towards maturity necessary for permanent commitment. With the promulgation of the 1983 Code of Canon Law, post-novitiate formation is accorded formal legislation and recognized as an intrinsic aspect of religious life. The Code specifies its aims, dimensions and pedagogy, leaving its structure and duration to be designed by individual institutes. The Church requires that each institute draw up a *ratio* which is structured according to the provisions of universal norms at the same time allowing some latitude for necessary adaptations of aspects which may require revision.

Despite the provisions specified in the universal law, together with further directives given in subsequent Holy See documents, formation of religious continues to be a constant challenge to the Church as well as religious institutes. This is due to the constant and rapid changes in human society, in the Church and within religious life itself which create new realities and new needs. This call on the Church to continuously issue new directives which can respond to the challenges in formation brought about by the new realities. For religious institutes, a major concern is the need to update the formation programme.

This study seeks to establish the extent of conformity in the implementation of proper law

to the universal principles on formation during the period of temporary vows in one particular apostolic women's religious institute and the norms and their adaptations in view of changing circumstances and new realities in the Church and in the Institute.

Chapter One traces the evolution of the legislation on formation of lay religious from the 1917 Code, through the Vatican II documents, to the revision and promulgation of the 1983 Code in the context of consecrated life, its identity and role in the Church. Chapter Two gives an analysis of the norms on formation during the period of temporary vows as presented in the 1983 Code and subsequent magisterial documents. Chapter Three treats the principles and structure of formation in the Institute of the Blessed Virgin Mary. Chapter Four focuses on the aspects of the formation programme which demonstrate lack of conformity in their practical application with the principles of universal norms and those norms which require updating as a result of new realities and needs in the Institute, the Church and the world. The chapter offers suggestions for an improved legislation on formation during temporary vows in universal law such as the possibility of revision of certain canons on temporary vows and legislation on a feminine model of formation.

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ABBREVIATIONS

<i>AA</i>	SECOND VATICAN COUNCIL, Decree on the Apostolate of Lay People <i>Apostolicam actuositatem</i>
<i>AAS</i>	<i>Acta Apostolicae Sedis, Commentarium officiale</i>
<i>AG</i>	SECOND VATICAN COUNCIL, Decree on the Church's Missionary Activity <i>Ad gentes</i>
<i>ASS</i>	<i>Acta Sanctae Sedis</i>
CAID	Central Archives, Institute of the Blessed Virgin Mary, Dublin
c.	canon
cc.	canons
CCCCB	Canadian Conference of Catholic Bishops
<i>CCEO</i>	<i>Codex canonum Ecclesiarum orientalium, auctoritate Ioannis Pauli PP. II promulgatus, fontium annotatione actus</i>
<i>CCLA</i>	E. CAPARROS et al. (eds.), <i>Code of Canon Law Annotated</i>
<i>CD</i>	SECOND VATICAN COUNCIL, Decree on the Pastoral Office of Bishops in the Church <i>Christus Dominus</i>
<i>CIC/17</i>	<i>Codex iuris canonici, Pii X Pontificis Maximi iussu digestus</i>
<i>CIC</i>	<i>Codex iuris canonici, auctoritate Ioannis Pauli PP. II promulgatus</i>
CICLSAL	Congregation for Institutes of Consecrated Life and Societies of Apostolic Life
<i>CLD</i>	<i>Canon Law Digest</i>
CLSA	Canon Law Society of America
<i>CLSA Comm1</i>	J.A. CORIDEN, T.J. GREEN, and D.E. HEINTSCHEL (eds.), <i>The Code of Canon Law: A Text and Commentary</i>
<i>CLSA Comm2</i>	J.P. BEAL, J.A. CORIDEN, and T.J. GREEN (eds.), <i>New Commentary on the Code of Canon Law</i>

CLSANZ	Canon Law Society of Australia and New Zealand
<i>CLSAP</i>	<i>Canon Law Society of America Proceedings</i>
CLSGBI	Canon Law Society of Great Britain and Ireland
<i>CLSGBI Comm</i>	G. SHEEHY et al. (eds.), <i>The Canon Law: Letter & Spirit</i>
CPAT	Canadian Provincial Archives, Toronto.
<i>DH</i>	SECOND VATICAN COUNCIL, Declaration on Religious Liberty <i>Dignitatis humanae</i>
<i>DV</i>	SECOND VATICAN COUNCIL, Dogmatic Constitution on Divine Revelation <i>Dei Verbum</i>
<i>Exegetical Comm</i>	A. MARZOA, J. MIRAS, R. RODRÍGUEZ-OCAÑA (eds.) and E. CAPARROS [gen. ed. of English translation], <i>Exegetical Commentary</i>
<i>ES</i>	PAUL VI, letter <i>Ecclesiae Sanctae</i> Implementing the Decrees <i>Christus Dominus, Presbyterorum ordinis</i> and <i>Perfectae caritatis</i>
<i>FLANNERY1</i>	A. FLANNERY (gen. ed.), <i>Vatican Council II: The Conciliar and Post- Conciliar Documents</i> , vol. 1
<i>FLANNERY2</i>	A. FLANNERY (gen. ed.), <i>Vatican Council II: More Post-Conciliar Documents</i> , vol. 2
<i>GS</i>	SECOND VATICAN COUNCIL, Pastoral Constitution on the Church in the Modern World <i>Gaudium et spes</i>
GC	General Congregation [Chapter]
IBVM	Institute of the Blessed Virgin Mary
<i>LG</i>	SECOND VATICAN COUNCIL, Dogmatic Constitution on the Church <i>Lumen gentium</i>
NCCB	National Conference of Catholic Bishops (of the USA – prior to 1 July 2001)
<i>OE</i>	SECOND VATICAN COUNCIL, Decree on the Catholic Eastern Churches <i>Orientalium Ecclesiarum</i>
<i>OT</i>	SECOND VATICAN COUNCIL, Decree on the Training of Priests <i>Optatam totius</i>

<i>PB</i>	JOHN PAUL II, Apostolic Constitution on the Roman Curia <i>Pastor bonus</i>
<i>PI</i>	CONGREGATION FOR INSTITUTES OF CONSECRATED LIFE AND SOCIETIES OF APOSTOLIC LIFE, Directives on Formation in Religious Institutes <i>Potissimum institutioni</i>
<i>PC</i>	SECOND VATICAN COUNCIL, Decree on the Up-to-date Renewal of Religious Life <i>Perfectae caritatis</i>
<i>PO</i>	SECOND VATICAN COUNCIL, Decree on the Ministry and Life of Priests <i>Presbyterorum ordinis</i>
<i>RFIS</i>	CONGREGATION FOR CATHOLIC EDUCATION, <i>Ratio fundamentalis institutionis sacerdotalis</i>
<i>RfR</i>	<i>Review for Religious</i>
<i>RLR</i>	<i>Religious Life Review</i>
<i>RC</i>	CONGREGATION FOR RELIGIOUS AND SECULAR INSTITUTES, Instruction on the Renewal and Adaptation of Formation for Living the Religious Life <i>Renovationis causam</i>
<i>SC</i>	SECOND VATICAN COUNCIL, Constitution on the Sacred Liturgy <i>Sacrosanctum concilium</i>
Sr.	Sister
St.	Saint
<i>UR</i>	SECOND VATICAN COUNCIL, Decree on Ecumenism <i>Unitatis redintegratio</i>
USCC	United States Catholic Conference (prior to 1 July 2001)
USCCB	United States Conference of Catholic Bishops (since 1 July 2001)

GENERAL INTRODUCTION

For institutes of consecrated life to fully accomplish their mission in the Church, formation of the members is paramount. Fidelity and commitment to one's vocation depend largely on well-grounded formation which is systematic, integral and harmonized.

The topic of formation of non-clerical members of religious institutes (the thesis will limit its scope of consideration to formation of lay religious) has remained a constant concern of the Church. The conciliar documents clearly highlight the norms required for suitable renewal of formation in religious institutes and the need for religious institutes to define in their proper law the goals, methodology, programme and organization of the different stages of formation, keeping in mind the particular circumstances of place and time, and the specific needs of persons. In particular, the formation of religious during the period of temporary vows is addressed, taking into account its significance in deepening the novitiate formation and its probationary nature leading towards perpetual commitment. Moreover, the needs of religious institutes on matters related to formation of members are addressed by clarifying the requirements of the universal law on formation with consideration given to the present day reality of life of the Church and the world.

Especially in the post-conciliar period, the Church demonstrated an on-going quest for self-renewal in response to the call of the conciliar Fathers. This concern is clearly demonstrated by the promulgation of the norms on the formation phase after the first profession, in canons 659-661 of the 1983 Code and the numerous documents the Church has issued after the Second Vatican Council to explain the theological, doctrinal and canonical principles on formation, including those related to the meaning, purpose and requirements of the different stages of formation. Among more recent ecclesiastical documents of particular importance in this regard

one counts the Directives on Formation in Religious Institutes *Potissimum institutioni*, issued by the Congregation for Institutes of Consecrated Life and Societies of Apostolic Life on February 2, 1990, the post-synodal apostolic exhortation *Vita consecrata*, of Pope St. John Paul II, of March 25, 1996, the Instruction on Inter-Institute Collaboration for Formation *Attenta alla condizioni*, of December 8, 1998, or the Instruction on Consecrated Life in the Third Millennium *Starting Afresh from Christ*, of May 19, 2002. Indeed, special emphasis has been placed on the “pedagogy” of integral and systematic formation, with particular focus on harmonizing its different stages.

Universal law requires that after first profession formation of religious that already had begun in earlier stages be perfected, so that they may be able to lead the life of the institute more fully and carry out its mission more effectively (cf. c. 659 § 1). To this end, the Church further requires that individual institutes draw up a *ratio* or programme for this formation which specifies its structure and duration. This *ratio* is to be updated in accord with emerging needs and realities as *Vita consecrata*, no. 68 concurs:

The Synod Fathers earnestly asked all institutes of consecrated life and societies of apostolic life to draw up as soon as possible a *ratio institutionis*, that is, a formation programme inspired by their particular charism, presenting clearly and in all its stages the course to be followed in order to assimilate fully the spirituality of the respective institute. The *ratio* responds to a pressing need today. On the one hand, it shows how to pass on the institute's spirit so that it will be lived in its integrity by future generations, in different cultures and geographical regions; on the other hand, it explains to consecrated persons how to live that spirit in the different stages of life on the way to full maturity of faith in Christ.¹

Universal law requires that the *ratio* is to be drawn up in such a way that it prepares members in formation to meet the needs of the present times according to the nature and character of the institute. The formation programme is also to articulate and imprint on the members in formation the charism and spirituality of the institute, so that they may be able to

¹ JOHN PAUL II, post-synodal apostolic exhortation *Vita consecrata*, March 25, 1996 (=VC), no. 68 in AAS, 88 (1996), 443-444, English translation in *L'Osservatore Romano*, English ed., April 3, 1996, supplement, 13.

live the life of the institute with fidelity, in the circumstances of different cultures, times and places. Also, as has already been noted, the universal norms on post-novitiate formation of religious are supplemented with successive documents of the Holy See which give further specifications on the application of law and which respond to particular requirements of formation. Formulation and application of norms on post-novitiate formation by religious institutes, therefore, are to take into consideration not only the norms of universal law but also the directives found in related official Church documents.

The Institute of the Blessed Virgin Mary has specific provisions on formation during the period of temporary vows in its proper law. These provisions outline the aims, content and methodology of formation during temporary vows. However, the constantly changing circumstances, like social organization, culture, place, or time create new challenges for religious life and for the Church, and, consequently, require that the *ratio* of post-novitiate formation of the Institute be periodically re-evaluated and updated. This is in view of achieving the proper end of this stage of formation, which is the growth in the necessary maturity and readiness of a candidate for perpetual commitment, and consequently, the quality of life and effectiveness in the external apostolate/witness of members of the Institute.

In light of the above observations, the following questions are asked: how does the proper law of the Institute of the Blessed Virgin Mary (Loreto Sisters) on formation and its application actually respond to the purpose of formation during temporary vows specified in universal law? To what extent does the *ratio* for formation during the period of temporary vows create the appropriate structure and content to adequately prepare the members in formation to meet the demands of the present realities of the Institute and of the Church without compromising the requirements of universal legislation, while taking into account the cultural settings of concrete

application of the norms?

The study intends to analyze, critically and systematically, the universal canonical norms and those of the Institute of the Blessed Virgin Mary (Loreto Sisters) on post-novitiate formation. This is to help identify if there are discrepancies in the application of the norms by the Institute with the provisions of universal law and those aspects of the *ratio* which require further considerations. We will then propose some ways of how the Institute can better adapt these norms in view of the demands of present realities of life, so that members are formed and trained to meet the challenges and needs of the Institute more effectively and to live out their religious call more fully.

Some major academic studies have already been carried out in the area of our interest. They touch on specific aspects of formation, are undertaken from different perspectives and relate to various historical periods. Some authors have concentrated their attention specifically on formation of clerics,² while others have treated the overall formation process in religious institutes³ or have limited their research to novitiate formation.⁴ Again, certain authors carried

² See M. BARTCHAK, *Responsibility for Providing Spiritual Formation in Diocesan Seminaries According to the 1983 Code of Canon Law with Special Reference to the United States*, Canon Law Studies, no. 540, Washington, DC, Catholic University of America, 1992; P. KENDALL, *Intellectual Formation in the Major Seminary Curriculum: Principles and Considerations*, Canon Law Studies, no. 468, Washington, DC, Catholic University of America, 1970; A. LENDAKAVADAVIL, *Candidates for Priesthood: A Study of Their Suitability According to the New Code of Canon Law*, Shillong, Vendrame Institute of Publications, 1989; T. PURCELL, *The Training of Members of Religious Institutes for Ordained Ministry According to the Current Law of the Church*, Canon Law Studies, no. 557, Washington, DC, Catholic University of America, 2001.

³ See J. KOWAL, *Uscita definitiva dall'istituto religioso dei professi di voti perpetui: evoluzione storica e disciplina attuale*, Rome, Editrice Pontificia Università Gregoriana, 1997; N. MCFARLAND, *Religious Vocation: Its Juridic Concept*, Canon Law Studies, no. 328, Washington, DC, Catholic University of America, 1953; L. VOEGTLE, *Canonical Reasons for the Rejection of Candidates to Final Vows*, Canon Law Studies, no. 435, Washington, DC, Catholic University of America, 1963; T.T. AHN, *The Continuity and Dynamism of Religious Formation in the Consecrated Life in Relation to Christian Initiation*, Rome, Pontificia Studiorum Universitas a S. Thoma Aquinate. in Urbe, 2001; V.B. GROGAN, *The Canonical Implementation of the Renewal of Religious Formation, Government and Internal Discipline Since the Second Vatican Council in the Order of Friars Minor in the United States*, Canon Law Studies, no. 483, Washington, DC, Catholic University of America, 1974.

⁴ D.J. RILEY, *The Religious Novitiate and Diocesan Propaedeutic Period*, Rome, Pontificia Studiorum Universitas a S. Thoma Aquinate in Urbe, 1991.

out their task before the promulgation of the present Code, therefore their research and analyses relate to the norms of the 1917 Code which differ strikingly from the present legislation on formation of religious. The present study differs from the above works in its precise focus - since none of them addresses specifically the topic of formation of religious during the period of temporary vows - and in the time period to be considered. Additionally, the novelty and originality of the present work is further accentuated by its particular reference to the Institute of the Blessed Virgin Mary.

The matter of formation of religious is treated by numerous official documents of the Church, explaining the doctrinal, theological and canonical principles. The complexity of the subject matter called for a multifaceted and nuanced method to be employed in research and the presentation of its results. The main sources of the study consist, therefore, of the conciliar and magisterial teaching of the Church. Further, the relevant documents of the Roman Curia and its jurisprudence, the documents issued by conferences of bishops and religious institutes, and especially various texts referring to the organization and internal discipline of the Institute of the Blessed Virgin Mary will be taken into account. The scope of research is, however, limited to the canonical discipline of the Latin Church, due to the particular geographical and ecclesiastical setting of the Institute of the Blessed Virgin Mary. References to the Code of Canons of Eastern Churches will, nevertheless, be made when it is deemed necessary or particularly relevant from the point of view of the recently stressed need for studies in comparative law. While the proper legislation of the IBVM is, in principle, obtainable and no empirical (statistical or otherwise) research is included, the verification of the results of the thesis is expected to be fully attainable to the reader.

The specific application of the method of research finds its exemplification in the

following processes. Chapter One will treat the notion of formation in religious institutes, with particular focus on the period of temporary vows. The evolution of the legislation on formation of religious from the 1917 Code, through the Vatican II documents, to the revision and promulgation of the 1983 Code will be analyzed in order to provide for a broader ecclesial and historical-canonical context of the subsequent analysis of the current legislation on formation of religious.

Chapter Two will address, in their ecclesial, theological and canonical aspects, the juridical principles of formation of religious during the period of temporary vows as prescribed in the 1983 Code of Canon Law and further specified in subsequent official Church documents on formation, so as to establish the challenges which emerge from the understanding of norms on formation and their implementation.

Chapter Three will examine, predominantly from the canonical point of view, the organization of formation during temporary vows within the Institute of the Blessed Virgin Mary (Loreto Sisters). This will provide the foundation for answering the main questions of the thesis about the compatibility of the *ratio* for formation during the period of temporary vows with what the Church's authority demands and what is expected of the IBVM in the context of ecclesial life.

Chapter Four will offer an assessment of conformity in the implementation of proper law of the Institute of the Blessed Virgin Mary (Loreto Sisters) to the universal principles on formation during the period of temporary vows. Through comparing and cross-analyzing the particular norms, it will evaluate the fidelity of the Institute to the universal norms of the Church. The chapter will also propose some recommendations on how the legislation could be better adapted to the present situation of the Institute, and also of other institutes of consecrated life

facing similar challenges.

CHAPTER ONE: FORMATION DURING THE PERIOD OF TEMPORARY VOWS IN RELIGIOUS INSTITUTES IN THE CANONICAL TRADITION

Introduction

Formation in the understanding of the Church is a process of training and preparing certain persons to assume specific roles, status and offices. It is a practice as old as the Church itself. In the Gospels, there are references to Jesus training his disciples for their work of evangelization. He involved them in his ministry (Mt 14: 12-21) and sent them on mission (Lk 10:1-23). Jesus also prepared his disciples for the challenges of discipleship (Jn 15: 18-27, 16: 1-3; Lk 12: 12). He instructed them on the vigilance and faithfulness required of their life and ministry (Lk 12: 35- 47, 17: 7-10). Jesus taught his disciples by word and deed (Jn 13:1-17). He taught them how to pray (Mt 6: 5-15; Lk 11: 1-11); He taught them on forgiveness (Mt 18 15-22), and on the attitude of discipleship (Mt 5: 1-17).

The early Christian community initiated the new converts before baptizing them (Acts 8: 26-40). With the growth and evolution of the Church, various functions, roles and offices emerged which required specific formation (1Tim 3). Formation was always characterized by some form of apprenticeship, testing and assessment. The Church has always deemed it necessary to scrutinize the persons who assumed a certain approved way of life in the Church for suitability. Religious life is one of the states of life which requires a structured and well-defined formation.¹ Therefore, the first chapter which treats formation of lay religious in the canonical tradition is divided into five parts: 1) the state of consecrated life in the life of the Church, 2) the state of consecrated life as lived within religious institutes, 3) the notion of formation of women

¹ See D.F. O'CONNOR, *Witness and Service: Questions about Religious Life Today*, New York, Paulist Press, 1990, 63-64.

religious according to the 1917 Code, 4) the impact of Vatican II on consecrated life, and 5) the process of the revision of Canon Law on consecrated life.

1.1. The State of Consecrated Life in the Church

As a prelude to understanding the evolution of formation of lay religious during temporary vows in the canonical tradition, some background on the meaning, place and role of consecrated life in the Church as lived in religious institutes is of great significance.

1.1.1. Formation of Religious as a Constant Concern for the Church

The state of religious life has its basis in a divine call which has to be discerned and tested for authenticity. Persons who embrace religious life also assume serious obligations in the Church. Since the lives and actions of such persons directly affect the witness and fulfillment of the mission of the Church, they therefore require proper training and formation to equip them with the correct understanding of their identity and role in the Church, to achieve the maturity required for lifelong commitment, and to provide them with the necessary skills for apostolic work. The Church therefore proceeds with great discretion and prudence, accompanied by lengthy testing and assessment in admitting persons to religious institutes.² The Church obliges also that formation of religious be continued throughout life for greater personal integration, maturity and deeper configuration to the person of Christ.³

Formation of religious, especially women, has undergone a process of evolution in the period between the promulgation of the 1917 Code and the post-conciliar reform, with major

² See *ibid.*, 64.

³ See *ibid.*, 61.

innovation in the formation of religious during temporary vows. Changes in the structure and pedagogy of formation of religious have been necessitated by the ever-changing circumstances in the Church and in the world.

The 1917 Code⁴ and its commentators⁵ address exclusively the formation after the novitiate for candidates for sacred orders. Formation of lay religious, configured to a monastic religious lifestyle, was limited to postulancy and novitiate. Formation for women religious during temporary vows was totally lacking, perhaps because it was not deemed necessary.⁶ However, with the emerging new realities requiring active apostolic endeavours, the religious way of life shifted from cloister to active apostolic life.⁷ This required more direct contact with the world which was something new for women religious and for which they were not prepared. Such changes created the need for new preparation and training of members.⁸ This called for a thorough human formation, including psychological aspects, and a specialized training which

⁴ *Codex iuris canonici, Pii X Pontificis Maximii iussu digestus, Benedicti Papae XV auctoritate promulgatus*, Typis polyglottis Vaticanis, 1917 (=CIC/17), English translation E.N. PETERS, *The 1917 Pio-Benedictine Code of Canon Law*, San Francisco, Ignatius Press, 2000. This translation is used for all subsequent citations of the canons of the 1917 Code. The 1917 Code devotes cc. 539-552 to postulancy, cc. 553-571 to novitiate and cc. 572-586 to religious profession. The next immediate canons, 587-591 treat on formation of clerical religious.

⁵ See T. BOUSCAREN et al., *Canon Law: A Text and Commentary*, 4th rev. ed., Milwaukee, WI, Bruce Publishing Co., 1966, 289-293; F.X. WERNZ and P. VIDAL, *De religiosis*, Rome, Gregorian University Press, 1933, 320; S. WOYWOD and C. SMITH, *A Practical Commentary on the Code of Canon Law*, St. Louis, MO, B. Herder, 1948, 270-280; D.L. LANSLOTS, *Handbook of Canon Law for Congregations of Women under Simple Vows*, 4th enlarged ed., New York, F. Pustet, 1910, 102-116; A.C. BACHOFEN, *A Commentary on the New Code of Canon Law*, vol. 3, St. Louis, MO, B. Herder, 1931, 292-297; P. TRUDEL, *A Dictionary of Canon Law*, St. Louis, MO, B. Herder, 1920, 215; B. VAN ACKEN, *A Handbook for Sisters*, St. Louis, MO, B. Herder, 1930, 371.

⁶ See M. MULLINS, "God in Search of Humanity," in F. NADINE, *Journey in Faith and Fidelity: Women Shaping Religious Life for a Renewed Church*, New York, Continuum Publishing Company, 1999, 20-24. See also VOEGTLE, *Canonical Reasons for the Rejection of Candidates to Final Vows*, xi, where the author states, "temporary vows as such are of relatively recent origin in the Church [...]. The discussion of rejection of candidates will necessarily be limited to the period of novitiate since at its completion, final solemn profession was made."

⁷ See B. MEYERS, *The Education of Sisters: A Plan for Integrating the Religious, Cultural, Social and Professional Training of Sisters*, New York, Sheed & Ward, 1941, 10.

⁸ See O'CONNOR, *Witness and Service*, 71; See also G. SCHNER, "Formation: A Search for Rules," in *The Way Supplement*, 56 (1986), 71-84.

might not have been a significant necessity before.

Due to rapid changes in human society⁹ and the demands for professional skills of those entrusted with apostolic work, the necessity for continued formation of lay religious after first profession was evident long before Vatican II. As Dries points out, “prior to 1950s, most women religious had little formal spiritual preparation and almost no educational background for teaching, nursing or other ministerial tasks. These were learned ‘on job.’”¹⁰ The sisters generally lacked the required professional skills to match the professional standards required for the apostolates they were to carry out. Nadine adds, “the study of scripture and theology had not been a primary emphasis for most women religious in their formation and preparation for ministry.”¹¹

This led to the launching of the Sisters’ Formation Conference of women religious congregations in North America.¹² The Church was also becoming increasingly aware of the need for professional formation for sisters as was evident in the call of Pope Pius XII to women religious institutes to provide professional training and on-going formation after the novitiate.¹³

⁹ See SECOND VATICAN COUNCIL, Pastoral Constitution on the Church in the Modern World *Gaudium et spes*, December 7, 1965 (=GS), nos. 4-10, in *AAS*, 58 (1966), 1027-1033, English translation in *FLANNERY I*, 905-911.

¹⁰ A. DRIES, “Living in Ambiguity: A Paradigm Shift Experienced by the Sisters’ Formation Movement,” in *The Catholic Historical Review*, vol. 79, no. 3 (1993), 478.

¹¹ F. NADINE, “Introduction,” in F. NADINE (ed.), *Journey in Faith and Fidelity*, 13.

¹² For details, see R. BRADLEY (ed.), *The Mind of the Church in the Formation of Sisters: Proceedings for the Sister Formation Conference for 1954-1955*, New York, Fordham University Press, 1956; ID., *Planning for the Formation of Sisters: Proceedings for the Sister Formation Conference for 1956-1957*, New York, Fordham University Press, 1958; ID., *Spiritual and Intellectual Elements in the Formation of Sisters: Proceedings for the Sister Formation Conference for 1955-1956*, New York, Fordham University Press, 1957. See also E. GAMBARI, *The Religious Adult in Christ: Religious Formation before Perpetual Profession, Juniorate Years of Studies Scholasticate*, Boston, St. Paul Editions, 1971; E. ANN, “Apostolic Formation through the Curriculum,” in *Sisters Formation Bulletin*, vol. 4, no. 3 (1958), 1-7; M.T. AQUINAS, “Education of Sisters in Extension Courses,” in *Sisters Formation Bulletin*, vol. 5, no. 3 (1959), 4-9.

¹³ See PIUS XII, Address to Delegates of Orders, Congregations, Societies of Apostolic Life and Secular Institutes, December 8, 1950, in *AAS*, 43 (1951), 27, English translation in *CLD*, vol. 3, 120; ID., apostolic letter

The Pope also erected a theological institute for women religious in Rome.¹⁴

At Vatican II, formation of religious was treated as a major concern for renewal. Besides the conciliar documents which addressed the renewal of religious life,¹⁵ on February 1, 1969, the Sacred Congregation for Religious and Secular Institutes issued an instruction dedicated in its entirety to formation of religious and, for the first time, with a focus on formation during temporary vows.¹⁶ The document was a response to the request of many congregations on how to implement the desired renewal on formation.¹⁷ The content of the document together with other conciliar documents eventually became part of the norms on formation during temporary vows in the 1983 Code. The Code, in view of the conciliar documents, substantially reordered the norms on formation of religious, including a new section on formation during temporary vows.¹⁸ Canon

Sedes sapientiae, May 31, 1956, in *AAS*, 48 (1956), 354-365, English translation in *CLD*, vol. 4, 169-182. See also CONGREGATION FOR RELIGIOUS, Instruction on Careful Selection and Training of Candidates for the State of Perfection and Sacred Orders *Religiosorum institutioni*, February 2, 1961, in *CLD*, vol. 5, 452-486. The instruction, at nos. 1-2, emphasizes the grave responsibility of institutes in careful selection, training and investigation prior to profession and ordination (453). At no. 4, it specifies the recipients as including superiors of religious communities, of societies of common life and of secular institutes (especially if the last incorporated clerics) (455).

¹⁴ See PIUS XII, Motu Proprio on the Institute “Regina mundi” *Nihil Ecclesiae antiquius*, February 11, 1956, in *AAS*, 48 (1956), 189-192, English translation in *CLD*, vol. 4, 185-189. The institute, affiliated to the Gregorian Pontifical University, was to offer a three-year long theological course to women religious in order to equip them with necessary skills and training for their apostolic work.

¹⁵ See SECOND VATICAN COUNCIL, Decree on the Up-to-date Renewal of Religious Life *Perfectae caritatis*, October 28, 1965 (=PC), in *AAS*, 58 (1966), 702-712, English translation in *FLANNERY I*, 611-623; ID., Dogmatic Constitution on the Church *Lumen gentium*, November 21, 1964 (=LG), nos. 43-47, in *AAS*, 57 (1965), 49-53, English translation in *FLANNERY I*, 402-407; PAUL VI, Norms for Implementing the Decree on the Adaptation and Renewal of Religious Life *Ecclesiae Sanctae, II*, August 6, 1966 (=ES II), in *AAS*, 58 (1966), 775-782, English translation in *FLANNERY I*, 624-633.

¹⁶ See CONGREGATION FOR RELIGIOUS AND FOR SECULAR INSTITUTES, Instruction on the Renewal and Adaptation of Formation for Living the Religious Life *Renovationis causam*, January 6, 1969 (=RC), in *AAS*, 61 (1969), 103-120, English translation in *FLANNERY I*, 634-655.

¹⁷ Elio Gambari observes that, “the conciliar norms did not find unprepared soil. For quite some time Institutes had been faced with the problem created by an increasingly urgent need for their apostolic activities and an inadequate preparation of their members. Various Institutes realized that the basic problem [of formation of members] could only be resolved with a prolonged period of preparation” (GAMBARI, *The Religious Adult in Christ*, 24-25).

¹⁸ *CIC/17*, cc. 587-591 were replaced with cc. 659-661, with parallel c. 471 in *CCEO*. Smith acknowledges that the legislation on formation of religious is an innovation of the present Code. The Church now understands that

659 § 2¹⁹ offers a twofold purpose of the formation of religious during temporary vows: first, to enable them to lead more fully the proper life of the institute and secondly, to carry out its mission more fully. Since the state of consecrated life is intrinsically linked to the life and mission of the Church, the mission of the institute, which the members are to fulfill, is the mission of the Church. Persons consecrated in the Church by means of the profession of the three evangelical counsels have a mandate deriving from their consecration, as c. 573 § 1 puts it, “to the building up of the Church, and to the salvation of the world, they strive for perfection of charity [...] having been made an outstanding sign in the Church, foretell the heavenly glory.”²⁰

Formation of religious has remained a constant concern for the Church even in the post-conciliar period. The Church has continued to address the subject of formation of religious through her documents intended to give directives on newly emerging issues.²¹ Indeed, formation of religious has remained an indispensable topic in most recent documents on consecrated life.²²

formation is a right and obligation for all religious and a life-long process. See R. SMITH, “Commentary on the Formation of Religious (cc. 659-661),” in *CLSA Comm2*, 826. Formation of clerical religious prescribed in c. 659 § 3 is outside the scope of this study.

¹⁹ *Codex iuris canonici, auctoritate Ioannis Pauli II promulgatus*, Libreria editrice Vaticana, 1983, English translation *Code of Canon Law, Latin-English Edition, New English Translation*, prepared under the auspices of the Canon Law Society of America, Washington, DC, Canon Law Society of America, 2012. This translation is used for all citations of the canons of the 1983 Code.

²⁰ Cf. *LG*, no. 44, in *AAS*, 57 (1965), 50-51, in *FLANNERY I*, 403.

²¹ See CONGREGATION FOR INSTITUTES OF CONSECRATED LIFE AND SOCIETIES OF APOSTOLIC LIFE, Directives on Formation in Religious Institutes *Potissimum institutioni*, February 2, 1990, in *AAS*, 82 (1990), 470-532, English translation in *Origins*, 19 (1989-1990), 677, 679-699; ID., Instruction on Inter-institute Collaboration for Formation *Attenta alla condizioni*, December 8, 1998, in *Enchiridion Vaticanum*, vol. 17, 1339-1373, in *CLD*, vol. 14, 591-623.

²² See JOHN PAUL II, Post-synodal Apostolic Exhortation to Men and Women Religious on Their Consecration in the Light of the Mystery of the Redemption *Redemptionis donum*, March 25, 1984 (=RD), in *AAS*, 76 (1984), 513-546, English translation in *Origins*, 13 (1983-1984), 721, 723-731; ID., post-synodal apostolic exhortation *Vita consecrata*, March 25, 1996 (=VC), in *AAS*, 88 (1996), 377-486, English translation in *L'Osservatore Romano* English ed., April 3, 1996, supplement, 1-24; CONGREGATION OF INSTITUTES OF CONSECRATED LIFE AND SOCIETIES OF APOSTOLIC LIFE, Essential Elements in the Church's Teachings on Religious Life as Applied to Institutes Dedicated to Works of Apostolates, May 31, 1983, in *Origins*, 13 (1983), 133-142; ID., Instruction on Consecrated Life in the Third Millennium *Starting Afresh from Christ*, May 19, in *Origins*, 32 (2002-2003), 131-149.

Conscious of the fact that effective renewal and fruitful apostolic endeavours depend on proper formation of members, the Church continuously urges religious institutes to pay serious attention to formation.²³ Besides being faithful to the nature, spirit and purpose of the particular institute, formation of members is to be adapted to the needs of the world, of the Church and the cultural background of the candidates.²⁴

Religious life is lived by members within the context of life in the Church. Religious therefore acquire their status and identity according to the prescription of the Church. Formation of religious as a process is to be, therefore, situated firmly within the ecclesial context.²⁵

1.1.2. The State of Consecrated Life in the Life and Holiness of the Church

This section treats the place and role of the state of consecrated life in the context of the hierarchical organization of the Church and the Church's canonical order. At a glance, the subject matter may appear to have no relationship with formation of religious during temporary vows. However, by recalling the description of consecrated life in c. 573 § 1 which locates consecrated life firmly in the ecclesial context, such a consideration is indispensable and necessary. It is very much a subject of formation, as apostolic ministry of those in temporary vows may entail a direct involvement with the organizational structures of a particular Church.

The constant and consistent teaching of the Church is that consecrated life does not belong to the hierarchical structure of the Church but it belongs to her life and holiness

²³ See *PI*, no. 1, in *AAS*, 82 (1990), 472, in *Origins*, 19 (1989-1990), 678.

²⁴ See *ibid.*, no. 67, in *AAS*, 82 (1990), 511, in *Origins*, 19 (1989-1990), 692.

²⁵ See F.G. MORRISEY, "Introduction," in J.S. HITE, S. HOLLAND, and D. WARD (eds.), *A Handbook on Canons 573-746*, Collegeville, MN, Liturgical Press, 1983, 22.

(c. 207).²⁶ Throughout her history, the Church has always acknowledged the presence and special and unique role of the state of consecrated life. Evidence of some form of religious life can be traced from the time of the early Christian community where some members embraced the evangelical perfection exhorted by Christ (1Cor 7:32-35).

From the third century, significant movements taking on some form of organized religious life emerged. The earliest of these groups are associated with Antony (251-356), Pachomius (290-346) and Augustine of Hippo (354-430).²⁷ They embraced asceticism and stressed a life of holiness and solitude. From then on, religious life passed through a succession of different phases with each phase having its own dominant image of religious life.²⁸ In the

²⁶ JOHN PAUL II recalls the words of *LG*, no. 44 when he firmly asserts, “the state of consecrated life belongs undeniably to the life and holiness of the Church” (JOHN PAUL II, Discourses on the Occasion of the Synod on Consecrated Life, September 29-December 15, 1999, in *Consecrated Life*, vol. 20, no. 2 (1999), 17. Note the adverb, “undeniably” which implies an inextinguishable link. On another occasion, the Pope states: “The Council after the call to holiness, has opportunely spoken about religious [...] explaining the profession of the evangelical counsels in the Church and the nature, importance and greatness of religious consecration. I therefore wish to here recall specifically the place which men and women religious, the members of the secular institutes have in my heart, even though they have been included in many of the subjects treated up to now. In fact, they are part of the people of God, they are deeply a part of the sacramental economy of the Church since religious life is the visible manifestation of the extreme logical consequence of the grace communicated by God to men especially with Baptism and with the Eucharist. They are the backbone of missionary action, they are present in the world of the apostolate and of culture, they are the sign of the perfect following of Christ and the presence of the eschatological reality of the ‘already’ and ‘not yet’ of the pilgrim Church here below” (ID., Address to the Staffs of the Roman Curia, in *L’Osservatore Romano*, English ed., July 26, 1982, 6). Wulf notes: “The religious state is a state within the Church, not just in the sense that it operates within the Church, receives grace from the Church and is legally sanctioned by the Church, but in the sense that it shares in a special way in the mystery of the Church. The religious state is one of her organs through which the Church perfects her own life” (F. WULF, “Decree on the Appropriate Renewal of the Religious Life,” in H. VORGRIMLER [ed.], *Commentary on the Documents of Vatican II*, vol. 2, Freiburg, Herder and Herder, 1968, 329). See also M.E. SOMALO, “Consecrated Life in the Mystery of the Church,” in *UISG Bulletin*, no. 100 (1996), 3-11.

²⁷ See L. CADA et al. (eds.), *Shaping the Coming Age of Religious Life*, New York, Seabury Press 1979, 26.

²⁸ These dominant images as Cada et al. point out, were characterized by four phases: 1] the growth phase when religious communities flourish, 2] the decline phase when religious communities lose their sense of purpose and gradually their identity become invisible, 3] the change-over phase when new images emerge as transformation of the old ones and, lastly, 4] the new image phase when the new images of the preceding phase become formalized as the new dominant image ushering the new age of religious life. See L. CADA et al. (eds.), *Shaping the Coming Age of Religious Life*, 2nd ed., Whitinsville, MA, Affirmation Books, 1985, 12. Cada et al. divide these phases into five main different ages of religious life. The first phase is the desert age (200-500). The religious life in this phase was characterized by a life of asceticism and pursuit of perfection in solitude. Formation of new members involved drawing to the desert and being trained into ascetic life under a master. The second phase was the age of monasticism (500-1200) marked by life in the monastery (like Monte Casino founded by St. Benedict) under the

course of history, these early forms of religious life evolved from the predominantly monastic way of life to the rise of apostolic communities. The shift in the image of religious life was mainly influenced by the major social developments and changes both in the Church and in the secular society.

Presently, the Church recognizes five forms of consecrated life.²⁹ Each form according to its nature, spirit and character contributes to the life and holiness of the Church. The forms of consecrated life are not homogenous, though. The Church, therefore, has prescribed norms which regulate their common characteristics but, at the same time, has left some latitude for legislation which respects their distinctiveness.

The link between the state of consecrated life and the life and holiness of the Church is demonstrated by the charism of the founder, the consecration and personal witness of the members, and the proper works of the institutes. It is worth noting that the notion of a life of holiness does not imply a distinguished category of the faithful who would claim a monopoly

discipline of a rule. Formation into the life involved following a structured rhythm of life, prayer and work. The third phase is the age of the mendicant orders (1200-1500). The image of religious life was marked with begging of alms with emphasis on evangelical poverty. This age is associated with St. Francis and St. Dominic. The fourth phase (1500-1800) was marked by the rise and rapid growth of apostolic congregations which deviated from the monastic way of life to respond to the apostolic needs of the world due to the social changes, especially in continental Europe. This phase saw the rise of congregations like the Society of Jesus and the Ursulines. The last phase is the age of the teaching congregations (1800). The dominant image of religious life of this period is characterized by a blend of pursuit of personal holiness and active apostolic service offered in established institutions, mainly schools and medical centres. From the 19th century, religious life has however been marked with challenging realities of loss of identity, decline in numbers due to massive departures and lack of vocations mainly in western countries, with the hope of survival of religious life largely in the developing countries. See *ibid.*, 11- 44.

²⁹ Religious institutes are governed by general norms on consecrated life (cc. 573-602) and their particular norms (cc.607-709); secular institutes (cc. 710-730); societies of apostolic life (cc. 731-746); hermits (c. 603); and the order of virgins (c. 604). For further commentary, see E. GAMBARI, *Renewal in Religious Life: General Principles, Constitutions, Formation*, Boston, St. Paul Edition, 1967, 57; J. BEYER "Religious Life or Secular Institutes," in *The Way Supplement*, 7 (1969), 112-132. See also E. McDONOUGH, "Categories of Consecrated Life," in *RfR*, 50 (1991), 301, where the author notes: "From a technical perspective, the canons list only four forms of consecrated life strictly so called and add the separate category of societies of apostolic life. However, the initial canon describing these societies compares them immediately to the institutes of consecrated life treated in the previous canons. Thus, for all practical purposes, there are really five identifiable and juridically specified forms under the umbrella category of 'consecrated life' in the revised Code."

over it.³⁰

The founder's charism is a means of witness of holiness for consecrated persons by virtue of its divine origin. The conciliar documents recognize the founding charism as a gift of the Holy Spirit to the Church.³¹ By means of this founding charism, the Church verifies the existence of a religious institute. Institutes of consecrated life have, throughout the history of the Church, participated in furthering the mission of the Church as a way of witnessing to the gospel message.³²

Charisms of religious communities are gifts approved by the Church to foster the life and the apostolic service of these communities.³³ Lived out genuinely by members, the founder's charism is a powerful means of witnessing to the holiness of the Church by the religious

³⁰ See R.F. Smith, "Theology of Religious Life," in *New Catholic Encyclopedia*, vol. 12, Washington, DC, Catholic University of America, 2003, 293 where the author distinguishes the fundamental call to holiness which is a universal Christian vocation from the functional vocation of the state of religious life. The author refers to the state of religious life as functional vocation whose state of holiness is functionally superior. However, the religious should not be considered superior to other Christians since Christian perfection is based in love and not in function. Those who have embraced religious life are not necessarily themselves holy but the vocation they have chosen under the divine motivation ascribes them to a distinct state of holiness. See also *LG*, no. 41 which affirms that "holiness is one" while the "forms and tasks of life are many" and each person attains the perfection of charity according to their gifts and duties (in *AAS*, 57 [1965], 45-47, in *FLANNERY I*, 398-400). *LG*, no. 42, clarifies that in striving for holiness those "undertaking poverty [...] and renouncing their own will" go "beyond what is of precept in the matter of perfection so as to conform themselves more fully to the obedient Christ" (in *AAS*, 57 [1965], 47-49, in *FLANNERY I*, 400-402).

³¹ *LG*, no. 45 states: "the hierarchy, following with docility the prompting of the Holy Spirit, accepts the rules presented by outstanding men and women and authentically approves these rules after further adjustments. It also aids by its vigilant and safeguarding authority of those institutes variously established for the building up of Christ's Body in order that these same institutes may grow and flourish according to the spirit of the founders" (in *AAS*, 57 [1965], 51-52, in *FLANNERY I*, 405); *PC*, no. 2 (b) states: "It is for the good of the Church that institutes have their own proper characters and functions. Therefore the spirit and aims of each founder should be faithfully accepted and retained, as indeed should each institute's sound traditions, for all of these constitute the patrimony of an institute" (in *AAS*, 58 [1966], 703, in *FLANNERY I*, 612); *ES II*, no. 16 (3) states: "To achieve the good of the Church, the institutes should strive for a genuine knowledge of their original spirit, so that faithfully preserving this spirit in determining adaptations, their religious life may thus be purified of alien elements and freed from those which are obsolete" (in *AAS*, 58 [1966], 778, *FLANNERY I*, 627).

³² See E.L. AYUBAN, "Charism and Foundation: Canonical Aspects in the Establishment of Institutes of Consecrated Life," in *Philippine Canonical Forum*, 9 (2007), 30.

³³ See *Redemptionis donum*, no. 15, in *AAS*, 76 (1984), 541-543, English translation in *Origins*, 13 (1983-1984), 730.

communities who collectively contribute to the salvation of the world by transforming it through their works. The charism is an effective way of contributing to the common good, transcending all political, social, economic and religious boundaries in order to serve humanity selflessly.³⁴

The consecration and personal witness of religious is another means of fostering the holiness of the Church.³⁵ The act of consecration by means of public profession of the evangelical counsels is a special witness of holiness in itself by virtue of religion and a means of worship and service to God.³⁶ The consecration implies a total self-giving of the person and a commitment to a life of constantly seeking God with an undivided heart, a life focused on God who is supremely loved.³⁷ The seeking of perfect charity and the splendid sign of the heavenly glory which constitute the witness of consecrated life are essentially a witness to the sanctity of the Church (c. 574 § 1).³⁸ Smith explains that the evangelical counsels professed and lived by the religious are means of challenging the values of the world which are anti-gospel. Smith further explains that the vow of chastity as lived by religious is a witness to true and perfect love which

³⁴ See E. McDONOUGH, "Charisms and Religious Life," in *R/R*, 52 (1993), 648.

³⁵ See *VC*, no. 39 where John Paul II states: "Consecrated persons, 'at the deepest level of their being [...] are caught up in the dynamism of the Church's life, which is thirsty for the divine Absolute and called to holiness. It is to this holiness that they bear witness. 'The fact that all are called to become saints cannot fail to inspire more and more those who by their very choice of life, have the mission of reminding others of that call' (in *AAS*, 88 [1996], 413, in *L'Osservatore Romano*, English ed., April 3, 1996, supplement, 7). Van Acken, in referring to religious life, calls it "a nursery for saints" because 80 percent of all the canonized saints in the Church were members of religious orders. He adds, "religious life is a great defense of the Catholic faith as members protect and uphold the faith by their constant prayer and practice of virtues." He further states that "their mere presence and witness is a constant and mighty protest to worldly values" (VAN ACKEN, *A Handbook for Sisters*, 57).

³⁶ Thomas Aquinas explains that, "Religion is the virtue by which we perform the service and worship of God. Hence, religious are so called because they dedicate themselves totally to the service of God, as if offering God a whole-burnt sacrifice" (*Summa theologiae*, II-II, q. 186, art. 1, English translation FATHERS OF THE ENGLISH DOMINICAN PROVINCE, *The Summa Theologica of St. Thomas Aquinas*, vol. 4, III-1, New York, Casimo Classics, 2013, 1964).

³⁷ See *PC*, no. 5, in *AAS*, 58 (1966), 704-705, in *FLANNERY I*, 610.

³⁸ See JOHN PAUL II, Message on the 4th World Day of Consecrated Life "The Prophetic Value of Consecrated Life to All Christians," February 2, 2000, in *L'Osservatore Romano*, English ed., February 9, 2000, 2. See also G. BATTELI, *Religious Life in the Light of the New Canon Law*, Nairobi, St. Paul Publications - Africa, 1996, 56.

is total surrender to God who is absolute love. Obedience, which is submission to God's will through human agents, is a sign of a great act of faith to allow other human beings to communicate the will of God. Poverty, which is surrender of self-satisfaction and fulfillment, is a sign of total dependence on God's providence. The three vows are in imitation of Christ who was chaste, poor and obedient to the will of the Father (Phil 2: 5-11).³⁹

The apostolic works carried out by religious communities are also powerful means of witnessing to the holiness of the Church. The present Code mentions personal witness by means of continuous conversion, bringing healing, hope, and forgiveness to the world (c. 673).⁴⁰ The apostolates are also powerful expressions of sharing the institute's charism with others and of corporate witness to the love of God whose power is continuously at work in the world.⁴¹

1.1.3. The State of Consecrated Life and the Hierarchical Organization of the Church

Canons 589-595 of the 1983 Code address the relationship between religious institutes and the hierarchy of the Church. The Church acknowledges the divine origin of the state of consecrated life by means of the founder's charism but to be part of the life of the Church, it has

³⁹ See R.F. SMITH, "Theology of Religious Life," 293. See also JOHN PAUL II, Message on the 11th World Day of Consecrated Life "Call to Radical Evangelical Fidelity," February 2, 2007, in *L'Osservatore Romano*, English ed., February 7, 2007, 2-3. See also SMITH, "Theology of Religious Life," 293.

⁴⁰ See *LG*, no. 46 (in *AAS*, 57 [1965], 52 in *FLANNERY I*, 406-407) which recalls the message of Pius XII in his encyclical letter, *Mystici corporis* where he affirms the significance of consecrated life in the Church when he states: "[...] Ecclesia praeterea, dum evangelica consilia amplectitur, Redemptoris paupertatem, obedientiam, virginitatemque in se refert. Ipsa per multiplicia variaque instituta, quibus veluti monilibus ornatur, Christum quodammodo commonstrat, vel in monte contemplantem, vel concionantem ad populos, vel sanantem aegros et saucios, ac peccatores ad frugem bonam convertentem, vel denique bene facientem omnibus" (When she embraces the evangelical counsels, the Church reproduces in herself poverty, obedience and virginity of the redeemer. Through the multiple and diverse institutes adorning her like so many jewels, in a certain sense show forth Christ in contemplation on the mountain, preaching to the poor, healing the sick and wounded, calling sinners back to the right way and doing good to all [PIUS XII, encyclical letter *Mystici corporis*, June 29, 1943, in *AAS*, 35 [1943], 214-215, English translation in C. CARLEN [ed.], *The Papal Encyclicals: 1939-1958*, vol. 4, Raleigh, NC, McGrath, 1981, 46]).

⁴¹ See McDONOUGH, "Charisms and Religious Life," 648.

to be given canonical approval by the competent ecclesiastical authority (c. 579).⁴² It is the prerogative of the ecclesiastical authority to determine the stable manner of living it, promote its life and growth, defend it from abuses and elements which impede its growth and protect the autonomy of communities where it is lived (c. 576).

Lumen gentium, no. 18 describes the relationship between the state of consecrated life and the hierarchy in the context of the concept of the Church as *communio*. The Church, in the conciliar understanding, is a structure with both mystical and social dimensions that fuses together many diverse realities.⁴³ At the mystical level, the Church is the body of Christ of which Christ himself is the head (c. 205).⁴⁴ At the social level, the Church is a communion of Christian faithful who, under the motivation of the Holy Spirit, are committed to the common mission in accordance with the fundamental equality and dignity which all enjoy by virtue of baptism (c. 208).⁴⁵ Within the Church, there are two categories of the faithful, the laity and the clergy. According to canon 204, all are called by Christ to further the mission of the Church, each according to their status and condition.⁴⁶

By divine institution, members of the hierarchy of the Church are those who by virtue of sacred powers flowing from their ordination are part of the Christian faithful that is entrusted with the task of teaching, sanctifying, and ruling. They comprise the supreme pontiff, bishops,

⁴² See P. DOYLE, "The Canonical Status of Religious Institutes," in *Studia canonica*, 18 (1984), 348. See also O'CONNOR, *Witness and Service*, 27.

⁴³ See *LG*, no. 18, in *AAS*, 57 (1965), 21-22, in *FLANNERY I*, 370.

⁴⁴ See *ibid.*, no. 7, in *AAS*, 57 (1965), 9-11, in *FLANNERY I*, 355.

⁴⁵ See *ibid.*, no. 33, in *AAS*, 57 (1965), 39, in *FLANNERY I*, 390.

⁴⁶ See *ibid.*

priests and deacons.⁴⁷ The lay faithful are to collaborate with the hierarchy in fulfilling these tasks (cc. 209-210). On the other hand, canon 207 clarifies that membership in consecrated life; is drawn from both the lay and the clerical members of Christ's faithful. Consecrated life as a state of life therefore, does not exist on its own but it subsists within these two categories of members of the Church. The confusion, which may arise from the above explanation, is addressed by canon 588 which makes the distinction between lay and clerical institutes,⁴⁸ on the occasion of stating that the state of consecrated life is *per se* neither clerical nor lay (c. 588 § 1). In the 1983 Code, consecrated life does not form a third category of state of life, unlike specified in the Eastern Code which delineates three states of Christian vocation as clerical (*CCEO*, cc. 323-398), lay (*CCEO*, cc. 399-409) and religious (*CCEO*, cc. 504-572).⁴⁹

Influenced by the spirit of Vatican II, canon 573 § 1 of the 1983 Code describes consecrated life as:

The life consecrated through the profession of the evangelical counsels is a stable form of living by which the faithful, following Christ more closely under the action of the Holy Spirit, are totally dedicated to God who is loved most of all, so that, having been dedicated by a new and special title to His honour, to the building up of the Church, and to the salvation of the world, they strive for the perfection of charity in the service of the kingdom of God and, having been made an outstanding sign in the Church, foretell the heavenly glory.

⁴⁷ See *ibid.*, no. 23, in *AAS*, 57 (1965), 27-29, in *FLANNERY I*, 376.

⁴⁸ See O'CONNOR, *Witness and Service*, 27.

⁴⁹ *Codex canonum Ecclesiarum orientalium, auctoritate Ioannis Pauli II promulgatus*, Typis polyglottis Vaticanis, 1990, English translation *Code of Canons of the Eastern Churches, Latin-English Edition, New English Translation*, prepared under the auspices of the Canon Law Society of America, Washington, DC, Canon Law Society of America, 2001. This translation is used for all citations of the canons of the 1990 Code. See also R. McDERMOTT, "Two Approaches to Consecrated Life: The Code of Canons of Eastern Churches and the Code of Canon Law," in *Studia canonica*, 29 (1995), 198. Canon 207 presents two groupings of Christian faithful deriving from the hierarchical constitution of the Church, clergy and laity. The canon however recognizes that the state of consecrated life has a distinct place in the spiritual mission of the Church. In a more practical sense, the definition given by *CCEO* appears to be more compelling as the state of consecrated life in the Church a stable form of life. It is not deniable that consecrated persons, by means of their consecration, the evangelical witness of their lives and works, and the unique charisms of their founders which they embrace, place them in a unique role and identity in the Church. The uniqueness of this state of life cannot be equated by the status of the laity *per se*, a fact attested by the legal system of the Church which accords it its own norms (cc. 573-746).

This canon presents a blend of juridical, theological and pastoral elements of the notion of consecrated life. This concept of consecrated life is the fruit of a long struggle in search of an appropriate terminology by the subcommission entrusted with the revision of the Code in its section concerning religious.⁵⁰ There was need for a vocabulary that would accommodate the theological and canonical elements which distinguish religious life from other forms of consecration and, at the same time, recognize its many diverse forms in their uniqueness and peculiarity.⁵¹

The Church has the duty, through her hierarchy, to exercise her supervisory authority of authenticating the gift of consecrated life and to ensure that it is ordered toward the mission of the Church according to the spirit of the founder (c. 576). As part of the body, the Church, members of institutes consecrated life as individuals are corporately joined to the Church by the bond of profession of faith, sacraments and ecclesial governance (c. 205). They are also joined in communion with the visible structure of the Church of Christ, governed by the Supreme Pontiff and the college of bishops.⁵² This submission to the authority of the Church is further reinforced

⁵⁰ See *Communicationes*, 1 (1969), 101-113.

⁵¹ The title which finally became "Consecrated Life" underwent several changes in various *schemas*. The title in the first *schema* was "De religiosis" but this included the members of secular institutes which the definition of *Perfectae caritatis* had declared as non-religious. See *Communicationes*, 2 (1970), 170-173. The title was then changed to "De institutis perfectionis" but this too contradicted the spirit of *Lumen gentium* (no. 40, in *AAS*, 57 [1965], 44-45 in *FLANNERY I*, 396-398) which had declared that the call to perfection was a common Christian calling binding on all. See *Communicationes*, 2 (1970), 174. The title changed again in respect to *Lumen gentium* which had limited the title 'religious' to consecration by profession of evangelical counsels (no. 45, in *AAS*, 57 [1965], 51-52, in *FLANNERY I*, 405-406). It then became "De institutis vitae consecratae per professionem consiliorum evangelicorum" which was abbreviated to "De institutis vitae consecratae." See *Communicationes*, 7 (1975), 63. This title was used generically to refer to all forms of consecrated life, which as Morrissey notes, unfairly included societies of apostolic life which do not possess all the elements qualified by the title. See F.G. MORRISSEY, "Introduction," in HITE, HOLLAND, and WARD (eds.), *A Handbook on Canons* 573-746, 22. See also ID., "The Spirit of the Proposed New Law for Institutes of Consecrated Life," in *Studia canonica*, 9 (1975), 79; J. BEYER, "Institutes of Perfection in the New Code," in *The Way Supplement*, 13 (1971), 90-9; B. PENNINGTON, "The Structure of the Section Concerning Religious Life in the Revised Code," in *The Jurist*, 25 (1965), 273-275; M. SAID, "The Present State of the Reform of the Code Concerning the Section *De institutis perfectionis*," in *Studia canonica*, 8 (1974), 228.

⁵² See *LG*, nos. 18-29, in *AAS*, 57 [1965], 21-36, in *FLANNERY I*, 369-387.

in canon 590 on the specific obligation of obedience to the Holy Father by virtue of the vow of obedience. The relationship between the state of consecrated life and the hierarchy is therefore that of submission and service on the part of the former vis-à-vis the approval and protection by the latter.⁵³

Both the hierarchy and the members of consecrated life strive toward a common goal which is the mission of the Church. While the institutes of consecrated life present to the Church the richness of their charismatic gifts, the hierarchy on its part is to coordinate and align apostolic activities arising from these gifts with the overall life of the Church (c. 675 § 3).⁵⁴ They are however part of the Church which is a complex, divine and human reality, animated by the Holy Spirit yet burdened with defects and weaknesses of its human members. To accomplish the mission of the Church effectively, the relationship between the institutes and the hierarchy, as Örsy explains, “[...] is to be characterized with respect, wisdom and mutual understanding.”⁵⁵ The hierarchy and the state of consecrated life do not exist in abstract. This relationship, therefore, has its practical expression in the actual manner of exercising authority, the virtue of obedience, the roles of particular agents, boundaries, all working towards the harmony which is to exist between the two sides for the effective accomplishment of the common good of the Church.⁵⁶

⁵³ See SYNOD OF BISHOPS, 9TH GENERAL ORDINARY ASSEMBLY, *De vita consecrata deque eius munere in Ecclesia et in mundo: instrumentum laboris*, Libreria editrice Vaticana, 1992, 86-87, English translation in *Origins*, 24 (1994-1995), 123. In no. 72 the document stresses that the relationship with the hierarchy is based on the Petrine ministry, that is, submission and obedience to the hierarchy. The document further explains that “The rejection of ecclesiastical discipline and dissent from the statements of the Magisterium in matters of faith and morals are damaging to the institute as well as to its individual members because they go against the Gospel which they are to give within the people of God, a witness essential to the consecrated life as such.”

⁵⁴ See O’CONNOR, *Witness and Service*, 12.

⁵⁵ L. ÖRSY, “The Hierarchy and Religious,” in *The Way Supplement*, 33 (1978), 117.

⁵⁶ See *ibid.*

Seen in the historical context, the relationship between the religious communities and the hierarchy has always been a complex one. At certain times, it has been one of great harmony, with both groups working together for the common good of the Church and, at other times, it has been marked with tensions and suspicions which, in some cases, resulted in negative witness and jeopardy of the mission the Church.⁵⁷ The search for the equilibrium of the relationship between the hierarchy and the institutes of consecrated life can be characterized as an on-going journey towards the ideal. On her part, the Church has continuously explored some more practical ways for searching of common grounds. The conciliar document, *Mutuae relationes*, published in 1979, aimed at providing some pastorally oriented norms to promote better understanding between the hierarchy and the religious, can serve as an example.⁵⁸ Efforts towards establishing closer ties and collaboration between the religious and the hierarchy of the Church have continued in the postconciliar period.⁵⁹

1.1.4. The Canonical Structuring of the State of Consecrated Life in the Latin Church

By virtue of its role and place in the life of the Church, the state of consecrated life requires firmness and stability so that it may effectively fulfill its mission in the Church. It

⁵⁷ See *ibid.*, 117-118.

⁵⁸ See CONGREGATION FOR BISHOPS AND CONGREGATION FOR RELIGIOUS AND SECULAR INSTITUTES, Directives for Mutual Relations between Bishops and Religious in the Church *Mutuae relationes*, May 14, 1978 (=MR), in *AAS*, 70 (1978), 473-506, English translation in *FLANNERY*2, 209-243.

⁵⁹ See JOHN PAUL II, Letter to US Bishops “Criteria for Relationships between Bishops and Religious,” April 3, 1983, in *CLD*, vol. 10, 91-97. See also CONGREGATION FOR INSTITUTES OF CONSECRATED LIFE AND SOCIETIES OF APOSTOLIC LIFE, *Final Report on Apostolic Visitation of Institutes of Women Religious in US*, December 16, 2014, Libreria editrice Vaticana, 2014. See also M.C. MCCARTHY and A.M. ZOLLMAN (eds.), *Power of Sisterhood: Women Religious Tell the Story of the Apostolic Visitation*, Lanham, MD, University Press of America, 2014; M.D. HYNOS, *The Relationship Between Religious and the Hierarchy since the Second Vatican Council*, Rome, Pontificia Studiorum Universitas a S. Thoma Aquinate in Urbe, 1969; P. HANNAN, *The Apostolate of Women Religious in the Particular Church since the Second Vatican Council: Juridical Relationships with Bishops according to the 1983 Code of Canon Law*, JCD thesis, Ottawa, Saint Paul University, 1989.

therefore needs the necessary protection from the Church by means of being granted canonical status.⁶⁰

The canonical structuring of the state of consecrated life is based on a long-standing principle of the Church of granting official approval and canonical status to physical and juridic persons (cc. 803 § 3, 117; *CCEO*, c. 632, 922).⁶¹ Schneiders refers to it as “ecclesiastical licensing to minister in the local Church.”⁶² Canonical status, as Doyle explains, “is the recognition given by the Church through its competent authority that a person, a group of persons or even a thing has a role, duty, responsibility or function in the life of the Church.”⁶³ Once granted, Doyle adds, “a person or a thing is qualified to operate in a certain way in the Church within certain rights and obligations.”⁶⁴

The right of conferring canonical status is exclusively vested in the competent ecclesiastical authority (cf. c.114)⁶⁵ who may grant the status after all the requirements and conditions are fulfilled.⁶⁶ According to c. 114 § 1, canonical status is granted to aggregate of persons or things either by law or by concession by competent Church authority, through a decree.⁶⁷ Institutes of consecrated life form part of the public groups within the Church, the

⁶⁰ See MORRISEY, “Introduction,” 22.

⁶¹ See R. HILL, “The Community and the Option of Non-Canonical Status,” in *RfR*, 41 (1983), 542. See also J. DE LOURDES LEONARD, “Temporal Goods,” in HOLLAND, and WARD (eds.), *A Handbook on Canons* 573-746, 100.

⁶² S. SCHNEIDERS, *Finding the Treasure: Locating Catholic Religious Life in a New Ecclesial and Cultural Context*, New York/Mahwah, NJ, Paulist Press, 2000, 260.

⁶³ DOYLE, “The Canonical Status of Religious Institutes,” 347.

⁶⁴ *Ibid.*, 348.

⁶⁵ See *LG*, no. 45, in *AAS*, 57 (1965), 51-52, in *FLANNERY I*, 405-406.

⁶⁶ See for example, canons on admission to orders (cc. 1024-1052), admission and formation of religious (cc. 641-658), erection and suppression of religious houses (cc. 608-612).

⁶⁷ See DOYLE, “The Canonical Status of Religious Institutes,” 348.

Church therefore constitutes them as public juridical persons by the law itself. Once granted canonical approval, which entails official recognition of its existence (c. 589) and of its proper law (c. 587), an institute is recognized as an ecclesial institution and acquires public juridic personality. It no longer exists as a private independent group but as one whose life and works are dedicated to the mission of the Church.⁶⁸

Canonical status, as Schneiders explains benefits institutes in many ways. First, it creates structures for coordination of apostolic works and opportunity for collective witness with other institutes. Secondly, it fosters smoother juridical relations between institutes and the hierarchy. Thirdly, it provides protection against abuses by authority and creates channels for recourse if necessary. Lastly, it helps keep religious conscious of their rootedness in the ecclesial identity.⁶⁹

Lumen gentium, no. 45 presents consecrated life as a stable form of life. This notion is reinforced by norms which safeguard the stable manner of living for members, and for institutes (cc. 573 § 1; 607 § 2). The institutes, as public juridical persons, and also their individual members enjoy protection of law (cc. 641; 220; 662-672; 695 § 2). In particular, the Church safeguards the patrimony of each institute (c. 576) and empowers institutes to acquire, administrate and alienate temporal goods (cc. 634-640). The universal law authorizes the internal authority of institutes to regulate matters of internal discipline (c. 586), while the ecclesiastical authority of the particular churches regulates and fosters the apostolic endeavours of institutes (cc. 678-683).

While canonical approval contributes in many ways to strengthening its ecclesial identity, Schneiders notes that it may sometimes jeopardize the true distinctiveness and the lived

⁶⁸ See O'CONNOR, *Witness and Service*, 5.

⁶⁹ See SCHNEIDERS, *Finding the Treasure*, 261.

experience of a community. She cites the directive of Vatican II which required religious congregations to revise their constitutions. Some institutes had to change significant portions of their proposed constitutions to avoid non-approval and consequently lost part of their lived experience.⁷⁰ Schneiders concludes that the identity of a religious community reaches beyond its canonical status and members should strive towards witnessing their spiritual patrimony in other ways than being preoccupied with canonical or non-canonical approval.⁷¹

Granting canonical status to an institute of consecrated life, however, is not an absolute vested right. It can be lost or modified for certain reasons and by various means.⁷² It is the prerogative of the competent authority to approve the modification or loss of canonical status (cc. 608-616; 583; 700)⁷³ and such changes have consequences in both canon (c. 701) and civil law (c. 1672).⁷⁴

The canonical structure bears also on the relationship between the institutes and their members and the Apostolic See. In this regard, the legislator has specified areas of competence of the internal authority of an institute (cc. 617-630) and of the external ecclesiastical authority (cc. 678, 594). The universal legislation has also recognized the diversity of the various forms of consecrated life (c. 605). The law of exemption as an extended protection of institutes is still in force in the common law with the right to invoke it if there is a need for that (c. 591). The Church fosters close relationship between the Holy See and institutes of consecrated life by

⁷⁰ See *ibid.*

⁷¹ See *ibid.*, 262.

⁷² See DOYLE, "The Canonical Status of Religious Institutes," 353. The author explains that individual religious may lose their canonical status either by dismissal or by dispensation. Institutes lose their canonical status by an act of the Holy See which can suppress it or approve its merger with another institute (c. 582).

⁷³ See *ibid.*, 348-349. See also O'CONNOR, *Witness and Service*, 10.

⁷⁴ See DOYLE, "The Canonical Status of Religious Institutes," 355-360.

means of the quinquennial report (c. 592). The solicitude of the Church is evident in the frequent magisterial documents which give specific directives on various aspects of religious life. The Roman Curia includes also a dicastery which is specifically dedicated to the matters concerning institutes of consecrated life and societies of apostolic life.⁷⁵

From the viewpoint of membership, admission is legislated as a juridical act which is to respect all the requirements and conditions required by law (cc. 641-645; 597). It is a state of life which members of the faithful assume freely (cc. 219; 573 § 2) but in a canonically approved institute. Consequently, those who embrace this state of life acquire a number of fundamental rights and essential obligations (cc. 662-672).⁷⁶ The Church is cautious in admission of members, obliges the competent superiors to admit only suitable persons (c. 642) and insists on prolonged formation before incorporation (c. 597 § 2).

The Holy See may intervene directly in matters which concern the status of members (cc. 686 § 3; 700). Members are consecrated in the name of the Church and thus acquire a new and special title which constitutes them as consecrated persons in the Church (c. 573 § 2). Schneiders remarks that canonical status establishes the religious as publicly recognized persons in the Church and this demands of them faithful and responsible witness of their consecrated

⁷⁵The Congregation for Institutes of Consecrated Life and Societies of Apostolic Life was first called Sacred Congregation for Consultations about Regulars, founded by Pope Sixtus V on May 27, 1586 and confirmed by the apostolic constitution *Immensa* (January 22, 1588). In 1601, it became Congregation for Bishops and Regulars. Its name changed twice in 1908; first, it was called Congregation of the Affairs of Religious and then Sacred Congregation for Religious (apostolic constitution of Pius X, *Sapienti Consilio*, June 29, 1908). The name again changed to Sacred Congregation for Religious and Secular Institutes (apostolic constitution *Regimini Ecclesiae Universae* of Paul VI, August 15, 1967). John Paul II renamed it to Congregation for Institutes of Consecrated Life and Societies of Apostolic Life (apostolic constitution *Pastor bonus*, June 28, 1988). See JOHN PAUL II, Apostolic Constitution on the Roman Curia *Pastor bonus*, June 28, 1988, in *AAS*, 80 (1988), 841-930, English translation *Apostolic Constitution "Pastor bonus,"* 28 June 1988, translated into English by F.C.C.F. KELLY, J.H. PROVOST, and M. THÉRIAULT, 2nd, revised, bilingual and annotated Latin-English edition prepared by M. THÉRIAULT, Ottawa, Faculty of Canon Law, Saint Paul University, 2000, art. 105-110.

⁷⁶ See E. McDONOUGH, "Understanding Obligations and Rights in Church Law," in *R/R*, 49 (1990), 779-780.

state in the Church. The Church has also legislated norms which specify invalid acts performed contrary to the demands flowing from the vows (c. 1088),⁷⁷ impose or prohibit certain acts (c. 672), and penalize acts contrary to the obligations flowing from the vows of evangelical counsels (c. 694 § 1, 1°; 696 § 1). Vows are professed, even if temporally, with the intention of making them permanent pursuant to canon 603 § 2.

The preceding discussion on the concept of consecrated life and its place and role in the Church serves as a background for the discussion of formation of religious in temporary vows. In their formation, religious in temporary vows are to be orientated toward a deeper understanding and appreciation of their identity: firstly, as consecrated persons, secondly, as religious with specific roles within the ecclesial context and, lastly, as persons facing the challenges which may arise from the relationship which exists between the hierarchy and the religious institutes. This understanding can be of great help to new members and contribute to a healthier mutual relationship between the religious and the hierarchy with regard to the roles, authority and boundaries of each part of the equation.

1.2. Consecrated Life in Religious Institutes

The following section focuses on consecrated life as it is lived in religious institutes. Canon 659 § 1 prescribes that formation of religious is to be configured to the individual institute since various institutes differ in their nature, spirit, character and purpose. Therefore, a description of the essential elements of religious life which, undoubtedly, are objectives of

⁷⁷ See c. 1088 which renders invalid an attempted marriage of a religious bound by a public perpetual bond of chastity. See also MCDONOUGH, "Separation of Members from the Institute," in HITE, HOLLAND, and WARD (eds.), *A Handbook on Canons 573-746*, 253. The author clarifies the juridical effects of canon c. 694 § 1, 2°. She explains that marriage of a religious in a public perpetual bond of chastity would only be referred to as "attempted" since it does not produce any juridical effects, that is, an act with no efficacy while a religious in temporary vows would contract a valid marriage even though unlawfully.

formation and the basis for assessment of readiness for perpetual commitment of a religious in temporary vows, is in order.

1.2.1. Religious Life and Religious Institutes within the Organizational Structure of Consecrated Life in the Church

The Church recognizes religious life as one of the oldest officially approved forms of consecrated life. The term “religious,” however, underwent several changes in its usage before the legislation of the 1917 Code as a result of the evolution of the concept of religious life itself. “Religious” referred only to those who professed solemn vows while those in simple vows “in the canonical language were not *religiosi* (religious) but *sodales*.”⁷⁸ The 1917 Code tried to settle the matter by qualifying those in simple vows as truly religious by detaching the meaning of the term from the nature of vows but retained the distinction which still carried with it some gradation (*CIC/17*, c. 488, 1°).⁷⁹ On the other hand, Pope Pius XII used the term “religious” to distinguish between members of orders and congregations.⁸⁰

During the revision of the Code, the typology of the term “religious” became the topic of one of the earliest discussions. To arrive at a common title which would include as many elements of this state of life as possible, given its diverse species and forms, was an uphill task during the revision of the 1917 Code.⁸¹ The 1983 Code, however, to some extent solved the

⁷⁸ F. WOLFGANG, *The Act of Religious Profession*, Canon Law Studies, no. 63, Washington, DC, Catholic University of America, 1931, 50.

⁷⁹ See *ibid.*

⁸⁰ See PIUS XII, apostolic constitution *Provida Mater Ecclesia*, February 2, 1947, in *AAS*, 39 (1947), 114-124, English translation in *CLD*, vol. 3, 135-146.

⁸¹ See footnote no. 51.

problem of terminology by restricting its usage to those institutes which exemplify the notion “religious” in the strict sense.⁸² The problem was not fully solved since the issue of the societies of apostolic life still appeared to be ill-fitted and misplaced under the section of institutes of consecrated life.⁸³

The present Code identifies religious life and religious institutes by the distinguishing elements stated in canon 607. Canon 607 § 1 presents a theological notion of religious life which recalls canon 573:

As a consecration of the whole person, religious life manifests in the Church a wonderful marriage brought about by God, a sign of the future age. Thus, the religious brings to perfection a total self-giving as a sacrifice offered to God, through which his or her whole existence becomes a continuous worship of God in charity.

Religious life is described as total consecration to God, a symbol of nuptial union likened to the marriage of Christ to the Church and perfection of the baptismal consecration.⁸⁴ Total consecration, according to *Redemptionis donum*, is an individual’s initiative. It states that, “it is a free and conscious giving of self to God.”⁸⁵ In the document issued by the Congregation for Institutes of Consecrated Life and Societies of Apostolic Life, ‘Essential Elements in the Church’s Teachings on Religious Life as Applied to Institutes Dedicated to Works of Apostolates,’ the stress is placed, however, on the divine initiative. The total consecration is presented as a divine gift freely given by God.⁸⁶ John Paul II further explains that the gift, though

⁸² See O’CONNOR, *Witness and Service*, 2

⁸³ See MORRISSEY, “Introduction,” 22.

⁸⁴ Cf. *CCEO*, c. 410. See *LG*, no. 44, in *AAS*, 57 (1965), 50-51, in *FLANNERY I*, 403-405. See also *PC*, no. 5, in *AAS*, 58 (1966), 704-705, in *FLANNERY I*, 614.

⁸⁵ *Redemptionis donum*, no. 7, in *AAS*, 76 (1984), 513-546, in *Origins*, 13 (1983-1984), 721, 723-731.

⁸⁶ See CONGREGATION FOR INSTITUTES OF CONSECRATED LIFE AND SOCIETIES OF APOSTOLIC LIFE, Essential Elements in the Church’s Teachings on Religious Life as Applied to Institutes Dedicated to Works of

given by divine action, is not a gift given to all. He states, “there is need to understand that not everyone can understand it [total consecration to God] in the sense that not everyone is able to grasp its meaning, to accept it, to practice it. [...], it is only granted to some. Those who do not understand it [...] are not attracted to it.”⁸⁷

Domingo J. Andrés considers the total consecration of the whole person as the highest form of gift that one can offer to God. He points out that “the practice of the evangelical counsels which is the extension of vows of religious also represents the highest form of worship.”⁸⁸ Elizabeth McDonough perceives the total consecration in a theological and juridical sense. According to her, total consecration to God is a life orientated toward the ideal in the context of rights and obligations and therefore it has legal implications.⁸⁹ Rose McDermott emphasizes, however, the ecclesial aspect of the consecration. She sees it as an ecclesial act by which the Church imparts on the religious a unique and a new status by means of public profession of the evangelical counsels within the context of liturgical celebration.⁹⁰

Sandra Schneiders concentrates her reflection on the juridical nature of total consecration. She views the act of total consecration as a serious juridical act which creates a new status of permanence and stability. She explains, “religious life is not something that a person casually enters but one which one becomes. It is,” she adds, “a permanent, stable and public form of life,

Apostolates, May 31, 1983, no. 5, in *Origins*, 32 (2002-2003), 134.

⁸⁷ JOHN PAUL II, Discourse on consecrated chastity, November 17, 1994, in *Consecrated Life*, vol. 20, no. 2 (1999), 43.

⁸⁸ D.J. ANDRÉS, “Commentary on Religious Institutes (cc. 607-709),” in *Exegetical Comm*, vol. 2/2, 1579.

⁸⁹ See E. McDONOUGH, *Religious in the 1983 Code: New Approaches to the New Law*, Chicago, IL, Franciscan Herald Press, 1985, 36.

⁹⁰ See MCDERMOTT, “Commentary on Religious Institutes (cc. 607-709),” 771.

[...] not a drop-in drop-out.”⁹¹ Prior to profession of vows, one undertakes a period of lengthy formation and testing which is accompanied by mature meditation and discernment followed by a definitive decision. The profession as a juridical act is placed in accord with all the required formalities and solemnities⁹² which brings about certain acquired rights, obligations and the change of the person’s status. That is, one who is not religious and not consecrated becomes consecrated and a religious.⁹³ Public profession of evangelical counsels as a distinguishing element of religious life, therefore implies an ecclesial form of commitment whereby members represent the Church in her public life by becoming a visible witness to a deep personal experience of Christ.⁹⁴ McDonough views the aspect of total consecration as a yardstick for assessment for suitability of candidates for admission and profession. “Total consecration,” she explains, “is the ideal which demands assessment of the whole person regarding age, health, disposition and maturity [...]”⁹⁵

While canon 607 § 1 defines the state of religious life as consecration of the whole person, § 2 and § 3 specify the distinctive characteristics of religious life as: 1) consecration by means of profession of public vows of evangelical counsels of chastity (c. 599), poverty (c. 600) and obedience (c. 601), 2) fraternal life in common (c. 602), and 3) public witness which entails separation from the world (c. 673).⁹⁶ These distinctive elements are employed by the canon not

⁹¹ SCHNEIDERS, *Finding the Treasure*, 127.

⁹² See c. 124. See also J. KUZIONA, *The Nature and Application of Juridical Acts According to Canon 124 of the Code of Canon Law*, JCD thesis, Ottawa, Saint Paul University, 1998, 153-163.

⁹³ See SCHNEIDERS, *Finding the Treasure*, 127.

⁹⁴ See O’CONNOR, *Witness and Service*, 5.

⁹⁵ MCDONOUGH, *Religious in the 1983 Code*, 36.

⁹⁶ See E.J. BEYER, “Religious Life or Secular Institutes,” in *The Way Supplement*, 7 (1969), 113. See also E. MCDONOUGH, “Categories of Consecrated Life,” in *R/R*, 50 (1991), 303, where the author further explains that “[r]eligious institutes are supposed to be generally and somewhat externally identifiable through such characteristics

only to define both religious life and religious institutes but also to make the distinction of this form of consecrated life from others. The above-mentioned elements, according to Kallumkal, constitute the *sine qua non* of religious life. He asserts that, “[...] without their practice [of public vows], fraternal life in common and separation from the world, no institute may be called religious, because they are the essential elements that characterize a religious institute.”⁹⁷

Canon 607 § 2 presents the concept of religious institutes, which repeats canon 488, 1° of the 1917 Code:⁹⁸

A religious institute is a society in which members, according to proper law, pronounce public vows, either perpetual or temporary which are to be renewed, however, when the period of time has elapsed, and lead a life of brothers or sisters in common.

The Concise Oxford Dictionary defines a society as “a large group of people who live together in an organized way, making decisions about how to do things and sharing the work that needs to be done.”⁹⁹ This definition highlights aspects of a group with organized life, planned works and target goals. Andrés defines the terms “institute” and “society” separately. He defines “institute” etymologically as derived from *instatuo* which means to “plant,” to “establish,” to “institute.” The definition implies the firmness and stability of the religious state. Similarly, he

as: observance of community life (cc. 608, 665), exercise of particular apostolates (cc. 674-675), governance structures with superiors and councils and general chapters (cc. 617-633), or recognizable exterior indications of membership (c. 669).” See also CONGREGATION FOR RELIGIOUS AND FOR SECULAR INSTITUTES, Norms for Religious Life, May 31, 1983, in *CLD*, vol. 10, 45. Besides the distinguishing elements in canon 607, the document mentions additional elements essential to religious life: corporate apostolate faithful to the founding charism, prayer, lifelong formation and some form of government founded on authority based on faith.

⁹⁷ J. KALLUMKAL, *The Patrimony of an Institute according to the Code of Canon Law*, Rome, Pontificia Università Lateranense, 1989, 139.

⁹⁸ The parallel canon in the Eastern Code equates the concept of society with orders or congregations (*CCEO*, c. 504). The canon however emphasizes approbation by competent ecclesiastical authority and the public nature of the vows as the qualifying elements of a religious institute. See McDERMOTT, “Two Approaches to Consecrated Life,” 207.

⁹⁹ J. PEARSAL (ed.), *The Concise Oxford Dictionary*, New York, Oxford University Press, Inc., 2001, 1369.

defines the concept of society. He takes recourse to its root meaning in Latin words *sequor*, *socius* which means “to follow,” “walk together,” “to be accompanied.”¹⁰⁰ A religious institute, therefore, can be described as an association of members sharing the same goals and the same way of life. This association is constituted by the profession of public vows, fraternal life in common and public witness, which entails separation from the world according to the character and purpose of each institute.

In the canonical system, the term society has its operational dimension in the concept of juridical persons.¹⁰¹ As O’Connor puts it, “a religious institute [...] is a juridical person in the Church with canonical status and a legal entity with rights and obligations.”¹⁰² He adds, “[...] membership in religious institutes alters the canonical status of members.”¹⁰³

Ultimately, the Code categorizes the religious institutes in view of five criteria, namely according to: 1) the nature of approbation – they are either pontifical or diocesan (c. 589)¹⁰⁴; 2) the canonical status of members - they are either lay or clerical (c. 588)¹⁰⁵; 3) gender - they are

¹⁰⁰ See ANDRÉS, “Commentary on Religious Institutes (cc. 607-709),” 1579. See also, for instance, G. BATTELI, *Religious Life in the Light of the New Canon Law*, Nairobi, St. Paul Publications - Africa, 1996, 73, where the author demonstrates the connection between the concept of society and fraternal life in common in a religious institute. He explains that life in fraternal communion demands the union of minds and hearts among the members of the same community for the attainment of the common and personal goals which form the essence of every society.

¹⁰¹ See cc. 113-123. See also KUZIONA, *The Nature and Application of Juridical Acts*, 128-135.

¹⁰² O’CONNOR, *Witness and Service*, 27.

¹⁰³ Ibid.

¹⁰⁴ For discussion on approbation, see F.G. MORRISEY, “The Restructuring of Provinces in a Religious Institute,” in *The Jurist*, 62 (2002), 114-130.

¹⁰⁵ *CIC/17*, c. 488, 4° implied that the distinction was based on the number of clerics in the institute. The present Code in c. 606 departs from such determination as it qualifies as a clerical institute one that fulfils the following conditions: it was the intention of the founder to create such an institute, it assumes the exercise of sacred orders, is under the supervision of clerics and is recognized as such by the ecclesiastical authority. See McDERMOTT, “Commentary on Religious Institutes (cc. 607-709),” 770.

either masculine or feminine (c. 606)¹⁰⁶ ; 4) character of their activity - they are either contemplative or apostolic (c. 577),¹⁰⁷ and 5) the authority they depend on - exempt or non-exempt institutes (c. 591),¹⁰⁸ though, in the present Code, the status of exempt or non-exempt institutes has ceased to be so much a category in the practical sense but survives more as a principle whose normative force the Church still recognizes.¹⁰⁹

¹⁰⁶ The canon, as Rincón-Peréz notes, intends to bring legislative unification between institutes for men and for women. The canon corrects an apparently discriminatory character of *CIC/17*, c. 490, which manifests notable differences in the canonical treatment of men and women religious. See, for instance, the discipline on confessors for women religious (*CIC/17*, cc. 520-521) and on the expulsion of perpetually professed religious women (*CIC/17*, c. 651). The new Code has abrogated all the disciplinary differences except in cases which the nature of things dictates. The Code, however, still retains norms which regulate the monasteries of nuns – this, however, is under current review. See T. RINCÓN-PÉREZ, “Commentary on Legislative Unification between Institutes for Men and Institutes for Women (c. 606),” in *Exegetical Comm*, vol. 2/2, 1575-1576.

¹⁰⁷ Having its origin in *LG*, no. 46, the canon departs from the criterion of distinction of institutes by type of vows (institutes of solemn or simple vows), introducing instead the manner of following Christ. While the contemplative institutes follow Christ more closely by praying, the apostolic institutes follow Christ more closely by their apostolic works of charity. See *ibid.*, 1477.

¹⁰⁸ See L.G. FANFANI and K.D. O’ROURKE, *Canon Law for Religious Women*, Dubuque, IA, Priory Press, 1961, 8-10.

¹⁰⁹ Historically, the principle of exemption arose for the purpose of regulating the relationships between institutes and local ordinaries which sometimes was characterized by excessive interference and control of apostolic works and the life of an institute. See LEO XIII, apostolic constitution *Romanos pontifices*, May 8, 1881, in *AAS*, 13 (1880-1881), 483. From the Council of Trent to the 1917 Code, the principle of exemption continued to be in force particularly for religious institutes of solemn vows. Throughout history, however, exemption did not prove to be an effective solution for ironing out the tensions which existed between the religious institutes and the local ordinaries as the problem was not always one-sided. Sometimes the institutes became independent to the extent that the bishop’s legitimate authority over them was undermined, or, at other times, bishops would be so dominative and even abusive of their authority that the rightful autonomy of the institutes was jeopardized. During Vatican II, the subject of exemption was addressed with the intention of curtailing its extension. Nevertheless, *LG*, no. 45 (in *AAS*, 57 [1965], 51-52, in *FLANNERY I*, 405-406) re-affirmed exemption and *CD*, no. 35, 3 (in *AAS*, 58 [1966], 691, in *FLANNERY I*, 585) supplemented *LG* by explaining its scope; *CD* clarified that exemption while diminishing the jurisdiction of the bishop over religious, confirms his authority over them in concerning their pastoral duties and care of souls. See also cc. 678-680 formulated on the basis of *CD*, no. 35 and *ES I*, nos. 22-44 (in *AAS*, 58 [1966], 769-770, in *FLANNERY I*, 604-605) which spell out norms regarding the relationship between religious and the bishops on matters of apostolate. See also *MR*, no. 22 (in *AAS*, 70 [1978], 487, in *FLANNERY II*, 224-225) which discusses the “pastoral meaning of exemption.” The principle of exemption found its place in the 1983 Code, as c. 591 for the reason of protection of the acquired rights and privileges of the exempt institutes whose status was not revoked at the time of promulgation of the Code. The Code does not expressly determine the scope of exemption in the practical sense but leaves it to the proper law. Even though the practical consequences of exemption appear to be absent in the current legislation due to the complexity of its application, the principle has not been silenced completely, as is evident in *VC*, no. 49 (in *AAS*, 88 [1996], 422-423, in *L’Osservatore Romano*, English ed., April 3, 1996, supplement, 9) where the Pope reaffirms it. See T. RINCÓN-PÉREZ, “Commentary on Canonical Exemption (c. 591),” in *Exegetical Comm*, vol. 2/2, 1520-1529. In conclusion, the principle can be said to be much more historical than practical. See for instance, J.M. HUELS, “The Demise of Religious Exemption,” in *The Jurist*,

1.2.2. Profession of the Evangelical Counsels

The first distinguishing element of religious life is the profession of the evangelical counsels by means of public vows which are perpetual or temporary with the intention of making perpetual vows in the future. Canon 607 § 2 highlights the permanent and public nature of the vows professed by religious. The Church has always emphasized the stable nature of the vows. The vows are always to be lived in firmness and permanency as R. Carpentier rightly states, “the Church does not call the religious to a temporary state but to a complete, perpetual, irrevocable giving of self.”¹¹⁰ In the historical context, the argument about the permanency of vows has been an interesting one. The 1917 Code had distinguished vows professed by religious as simple or solemn, temporary or perpetual, and this would be determined by the institute of ascription. Those who joined orders professed solemn vows, while those who joined congregations professed simple vows (*CIC/17*, c. 488, 1°). Temporary vows were almost synonymous with simple vows and according to some authors, solemn vows held the superiority of firmness and permanence.¹¹¹

54(1994), 40-55; D. KAY, “The Historical Origins of Canon 591 of the Code of Canon Law,” in *Studia canonica*, 25(1991), 451-464.

¹¹⁰ R. CARPENTIER, “Perseverance in the Religious Life,” in *Sister Formation Bulletin*, vol. 7, no. 3 (1961), 15.

¹¹¹ According to Saint Thomas Aquinas, “solemn vow is a more strict, perfect, complete consecration to God. Only solemn vows were religious vows so only those in solemn vows were religious” (*Summa theologiae*, II-II, q. 88; art. 7, English translation FATHERS OF THE ENGLISH DOMINICAN PROVINCE, *The Summa Theologica of St. Thomas Aquinas*, vol. 3, II-II, 1566). Many authors rate the two types of vows in relation to marriage, ownership of property and the effects of their dispensation. Solemn vows invalidate marriage while simple vows only make it unlawful. Solemn vows remove the right to own and acquire property while simple vows do not. A solemn vow is consecration in an absolute manner, a bond between an individual and God, which cannot be dispensed ordinarily while a simple vow, on the contrary, can easily be dispensed. In the event of dispensation, the effects of solemn vows are suspended but their radical obligations remain as opposed to simple vows whose obligations cease with dispensation. See J.A. ABBO and J.D. HANNAN, *The Sacred Canons: A Concise Presentation of the Current Disciplinary Norms of the Church*, vol. 2, St. Louis, Herder, 1960, 596-599. See also F. O’NEILL, *The Dismissal of Religious in Temporary Vows*, Canon Law Studies, no. 166, Washington, DC, Catholic University of America, 1942, 14-16.

The 1983 Code finally settled the matter by declaring all vows pronounced in religious institutes as either temporary or perpetual.¹¹² It is however worth noting that the present Code still recognizes the existence of solemn vows (c. 1019) and, implicitly, indefinitely professed temporary vows (cc. 623, 1019, 1052).¹¹³ With regard to solemn vows, the present Code stipulates no specific juridical obligations arising from them, as was the case in the 1917 Code (*CIC/17*, c. 582). The Church however obliges such institutes of perpetual temporary vows to specify in their proper law the time limit for such vows to qualify a member to be definitively incorporated.

According to current legislation, besides other approved vows in some specific institutes, the Church recognizes the public vows of the three evangelical counsels of chastity, poverty and obedience professed in the context of fraternal life in common and in view of perpetual commitment in case of temporarily professed vows.

On the public nature of the vows, E. McDonough explains that the Church recognizes vows as public when they are made *coram Ecclesiae* in a canonically approved institute according to canon 1191.¹¹⁴ Andrés clarifies that the publicity does not imply that the vows are pronounced before a large number of witnesses but in the sense that they are received by a lawfully designated superior of the institute, in the name of the Church, in the context of liturgical worship and for the purpose of consecration as a religious.¹¹⁵ Public profession of the evangelical counsels produces juridical effects, as they oblige the one who has professed them to

¹¹² See J. BEYER, "Institutes of Apostolic Life," in *The Way Supplement*, 8 (1971), 182.

¹¹³ See J. HITE, "Admission of Candidates," in HITE, HOLLAND, and WARD (eds.), *A Handbook on Canons 573-746*, 154.

¹¹⁴ See McDONOUGH, *Religious in the 1983 Code*, 36.

¹¹⁵ See ANDRÉS, "Commentary on Religious Institutes (cc. 607-709)," 1580.

fulfill obligations required of them by the Church and by the institute (cc. 599-602, 666, 665 § 1, 598, 590 § 2).¹¹⁶ The Church has legislated norms which defend them (cc. 1370 § 3), prescribed penalties for violating them (cc. 697-704), and specified acts which are contrary and incompatible with them.¹¹⁷

1.2.3. Life in Common

Fraternal life in common is presented in canon 607 § 2 not only as a distinguishing element of religious life but also an obligation for members. The obligation of fraternal life in common has its *locus* in a religious community as is described in canon 608. The canon presents the material notion of community as a house lawfully constituted according to canon 609 § 1,¹¹⁸ under the authority of a superior designated according to the norm of law (c. 625 § 1), and has inside it an oratory where Eucharist is celebrated and reserved so that it is truly the center of the community.¹¹⁹ These elements fuse together both the material and spiritual aspects which constitute a religious community. The description above presents the practical manner of living religious life. The Instruction on Fraternal Life in Community *Congregavit nos in unum Christi amor* refers to this as spiritual “fraternity” or “fraternal communion,” which arises from hearts animated by charity and the visible “life in common” or “community life” which consists of

¹¹⁶ See O’CONNOR, *Witness and Service*, 5-12.

¹¹⁷ See footnotes no. 79.

¹¹⁸ See E. O’HARA, “Norms Common to all Institutes of Consecrated Life,” in HITE, HOLLAND, and WARD (eds.), *A Handbook on Canons 573-746*, 65.

¹¹⁹ JOHN PAUL II, Message on the 9th World Day of Consecrated Life “Eucharist the Secret of Spiritual Ardour,” February 2, 2005, in *L’Osservatore Romano*, English ed., February 9, 2005, 7. See also O’CONNOR, *Witness and Service*, 19.

“living in one's own lawfully constituted religious house.”¹²⁰

It is clear that in as much as religious live together physically, an element of fraternal bonding based on unity with Christ is highlighted as a sign of witness to the divine love and as the basis for support and companionship.¹²¹ *Lumen gentium* further emphasizes the fraternal unity which should characterize this common life. It states that: “they [religious] are bound together in brotherly communion [...] thus they are enabled to live securely and to maintain faithfully the religious life to which they have pledged themselves.”¹²² Sandra Schneiders emphasizes the spiritual sense of fraternal life in common. She explains that life in common goes beyond material sharing of residence. It implies bonds of love and friendship, of a group of persons united in a common call who share a life of hope, charity and faith in consecrated celibacy committed to apostolic works with the Church.¹²³ She goes on to explain that community life is a network of affective relationships which extend even to non-members who have embraced the spirituality of that community.¹²⁴

Life in common has juridical implications for the members which include common residence (c. 608), acceptance of a common law of labour (c. 600), common authority (cc. 617-630), common apostolates in the name of the institute (cc. 673-683), common discipline (c. 587), common resources (c. 670), shared patrimony (c. 578), a religious garb or a secular dress

¹²⁰ CONGREGATION FOR INSTITUTES OF CONSECRATED LIFE AND SOCIETIES OF APOSTOLIC LIFE, *Fraternal Life in Community Congregavit nos in unum Christi amor (=Congregavit nos)*, no. 3, February 2, 1994, in *Enchiridion Vaticanum*, vol. 14, 221, February 2, 1994, English translation in *Origins*, 23 (1993-1994), 695.

¹²¹ JOHN PAUL II, Message to the Plenary Session of CICLSAL “The Fruitfulness of Religious Life Depends upon the Quality of the Fraternal Life in Common,” November 20, 1992, in *Consecrated Life*, vol. 18, no. 2 (1995), 17-20. See also O’CONNOR, *Witness and Service*, 19.

¹²² *LG*, no. 43, in *AAS*, 57 (1965), 49- 50, in *FLANNERY I*, 402-403.

¹²³ See SCHNEIDERS, *Selling All*, 7-8.

¹²⁴ *Ibid.*, 9.

appropriate as a sign of consecration and witness of poverty (c. 669). The obligation of fraternal life in common for religious has been accorded much juridical weight, especially the submission to the legitimate superior and continuous residence (c. 665) and the possible dismissal for unlawful prolonged absence (c. 696 § 1). Formation with regard to fraternal life in common should expose the religious in temporary vows to practical experiences of different community situations, complemented with theological input in both canonical and spiritual aspects of community life.

Life in common, as an aspect of religious life, has not been without challenges especially in the post-conciliar period as is attested by *Congregavit nos in unum Christi amor*.¹²⁵ While the present legislation provides no alternatives for life in common, the innovations brought by the Council, the changing realities of religious in terms of needs of apostolates and the diminishing numbers of members, have led to the transformation of the traditional structures of common life to other forms of life by the religious. Life in common as traditionally lived in community is becoming more and more challenged with modifications and variations ranging from, as Schneiders puts it, “inter-congregation living, mixed living (living with lay or mixed sex religious) or a religious living alone.”¹²⁶ She concludes that, “while community life remains a ‘non-negotiable’ element of religious life as such,”¹²⁷ for it to be meaningful in the present times, she adds, “members are to be formed into its meaning in the wider perspective so that they are able to live its diverse realities.”¹²⁸

¹²⁵ See *Congregavit nos*, no. 1, in *Enchiridion Vaticanum*, vol. 14, 220, in *Origins*, 23 (1993-1994), 693.

¹²⁶ S. SCHNEIDERS, “Formation for New Forms of Religious Community Life,” in *The Way Supplement*, 62 (1988), 63.

¹²⁷ *Ibid.*, 64.

¹²⁸ *Ibid.*, 75; for more commentary on life in common see, for instance, M. GALLAGHER, *The Common Life: An Element of Apostolic Religious Institutes of Women*, JCD thesis, Ottawa, Saint Paul University, 1995;

1.2.4. Withdrawal from the World

Public witness by means of withdrawal from the world is another essential distinctive element of religious life (c. 602 § 3). Withdrawal from the world (*fuga mundi*) as a tradition has a long history in the Church which goes beyond even the time of Jesus. A good example is the Qumran community which claimed moral superiority over their fellow Jews. According to them, the rest of the Jews had diluted the moral and religious standards of Judaism by accommodating values foreign to it. This caused them to withdraw to the mountains where they lived separately from the rest of the Jewish community.¹²⁹ Jesus also acknowledged the element of flight from the world as a mark of discipleship when he referred to his disciples as being in the world but not of the world (John 12:15-17). With the decline of the age of martyrdom, this practice was aggressively assimilated by the monastic communities which evolved in the Church in the medieval centuries. As such communities continued to evolve, so did stricter versions of the practice of withdrawal from the world (hermits separating themselves from the world and living in the desert).¹³⁰ Religious life, which structured itself from these monastic communities, also adopted the practice and with time, religious life became synonymous with flight from the world. As religious communities began receiving official ecclesial approbation, their rules were based

P. GARCIA, *Religious Community as a Parable of Love*, Quezon City, Claretian Publications, 1995; G. KATHOLIL, *Communion in Community: A Renewal Programme for Religious*, Mumbai, St. Paul's, 2002; A.B. SMITH, "Dialogue: The Path to Community," in *RLR*, 37 (1998), 10-14; G. URIBARRI, "A Reflection on Community Life and Its Demons," in *UISG Bulletin*, no. 120 (2002), 4-12; R. MCDERMOTT, "Community Life Supports Mission - Reflections on *Vita fraterna*," in *Commentarium pro religiosis et missionariis*, 81 (2000), 189-205.

¹²⁹ See R. CANTALAMESSA, "The Ideal Separation from the World," in *Consecrated Life*, vol. 17, no. 1 (1992), 99.

¹³⁰ See CADA, *Shaping the Coming Age of Religious Life*, 15.

on structured and strict monastic life style, especially with the legislation on papal enclosure.¹³¹

The mind of the Church was to preserve the solitariness of the religious and to protect women religious from scandal and from temptations in the world which could harm their consecration.¹³² This reasoning lost its weight with the rise and growth of institutes of simple vows whose life of active apostolic works proved incompatible with the cloistered way of life. It no longer made sense that life of the religious had to separate them from the world.¹³³

The aspect of withdrawal from the world as a means of public witness has continued to be an essential element of religious life. Andrés explains that the motivation of this aspect of religious life is in the pursuit of evangelical radicalism expressed in the eschatological witness of the living of the evangelical counsels which are counter secular values.¹³⁴ Rainero Cantalamessa explains that the manner of expressing the notion of withdrawal from the world may differ in different circumstances and in realities of the present human society.¹³⁵ This however does not mean condemning the world but changing those values which are contrary to the beatitudes and making a positive contribution to the world in all its spheres, be it social, political or economic.¹³⁶

The present ecclesial legislation, which has its roots in *LG*, no. 46, does not require all religious to live in cloister but does oblige all of them to some form of solitude in their life. This aspect of religious life is more intensely expressed in contemplative institutes as stated in canon

¹³¹ See *ibid.*, 20.

¹³² See C. GALLAGHER, "The Church and Institutes of Consecrated Life," in *The Way Supplement*, 50 (1984), 6.

¹³³ See L. VOEGTLE, *Canonical Reasons for the Rejection of Candidates to Final Vows*, Canon Law Studies, no. 435, Washington, DC, Catholic University of America, 1963, 53.

¹³⁴ See ANDRÉS, "Commentary on Religious Institutes (cc. 607-709)," 1582.

¹³⁵ See CANTALAMESSA, "The Ideal Separation from the World," 101.

¹³⁶ See *ibid.*

667 § 2-3. For apostolic institutes, the manner in which members are to witness to the aspect of *fuga mundi* is left to their proper law to determine. Other norms which express public witness by means of separation from the world include the wearing of habit (c. 669), discretion of the use of social means of communication (c. 666), reservation of some part of the religious house for members only (c. 667 § 1) and, apostolic works imbued with the specific charism and spirituality of the institute (c. 675).

The denominator of the norm of withdrawal from the world as means of public witness is to live according to values which are contrary to those of the world. The religious, in living by values contrary to the worldly ones, through the witness of their lives and works, contribute to the transformation of the world (cc. 673-675). The notion of withdrawal from the world is therefore linked directly to the identity of religious and their role in the Church expressed in canon 573. Separation from the world, as Rincón explains, is not to be understood as alienating the religious from humanity but on the contrary, as aiding them as they resort to prayer and solitude, to bring their fellow human beings to Christ and to build human society.¹³⁷ Jordan F. Hite adds that the public witness of common life and communal apostolic efforts carried out by religious tend to separate them from the mentality of the world without however separating them from the people they serve in the world.¹³⁸

1.3. Notion of Formation of Women Religious according to the 1917 Code

Formation for lay religious was orientated towards monastic life and was limited to the stage of postulancy and novitiate. It took the form of assimilation of rules and regulations by the

¹³⁷ See T. RINCÓN, “Commentary on Institutes of Consecrated Life and Societies of Apostolic Life (cc. 573-746),” in *CCLA*, 493.

¹³⁸ See J.F. HITE, “Commentary on Religious Institutes (cc. 607-709),” in *CommI*, 471.

candidates, a life of imitating the older members and simply fitting into the life style of the cloister. The above scenario was based on the understanding of concept of religious life itself by the Church in the period of the 1917 Code which was influenced by magisterial documents and legislation long before the promulgation of the 1917 Code. This section discusses the stages of formation in the 1917 Code from the perspective of the constitution of Leo XIII, *Conditae a Christo* and its impact on the understanding of the identity of women religious during this period. This section also looks at the custom of dowry of women religious and its significance in the formation process.

1.3.1. Canonical Significance of Constitution *Conditae a Christo* of Leo XIII (1900)

This apostolic constitution which has been referred to as the *Magna carta* for congregations of women religious of simple vows¹³⁹ was issued on 8 December 1900 by Pope Leo XIII.¹⁴⁰ This constitution came as a final solution to a long period of debate in the Church concerning the status of women religious who profess simple vows. The understanding of the Church, influenced by the Council of Trent,¹⁴¹ was that religious life for women was synonymous with a life of cloister and solemn vows.¹⁴² This understanding was reinforced by subsequent pontifical legislation most of which discouraged any alternative forms of lifestyle of

¹³⁹ See T. RINCÓN- PÉREZ, "Introduction," in in *Exegetical Comm*, vol. 2/2, 1462.

¹⁴⁰ LEO XIII, apostolic constitution *Conditae a Christo*, December 8, 1900, in *ASS*, 33 (1901), 341-347, English translation in I. LANSLOTS, *Handbook of Canon Law for Women Under Simple Vows*, 9th ed. rev. and enlarged, New York, F. Pustet, 1920, Appendix A, 246-258.

¹⁴¹ "Council of Trent-1545-1563: Session XXV, Decree on Regulars and Nuns," in N.P. TANNER (ed.), *Decrees of the Ecumenical Councils*, vol. 2, Washington, DC, Georgetown University Press, 1990, 776- 784.

¹⁴² See *Sextus* 1, 16, 6 (BONIFACE VIII, constitution *Periculoso*, 1298, in A. FRIEDBERG [ed.], *Corpus iuris canonici*, vol. 2, Leipzig, Tauchnitz, 1888, cols. 1053-1054). With this constitution, as Gallagher states, "the pope imposed the cloister on all religious women [...] in order to safeguard chastity, to avoid scandal and in order to ensure an atmosphere conducive to contemplation" (GALLAGHER, "The Church and Institutes of Consecrated Life," 5).

women religious or of profession of vows other than the cloister and solemn vows.¹⁴³ From the time of the Council of Trent up to the 17th century, as C. Gallagher affirms, “simple vows for religious were rejected and unacceptable [...] and communities without solemn vows were forbidden to admit novices and if they did, profession of such was invalid.”¹⁴⁴

Even though legislation on cloister and solemn vows was so strictly upheld by the Church authority, congregations of simple vows somewhat thrived and flourished. They soon became popular because of the great apostolic works they carried out, and their effective response to the circumstances and needs of the society of the day necessitated by social, economic and political change in Europe and the Western world.¹⁴⁵ Due to the firmness of their apostolic witness, the Church gradually softened her stand on them. At first, they were tolerated with some favours shown to them.¹⁴⁶ Eventually they were accorded official canonical recognition and approval which came in the form of the apostolic constitution *Conditae a Christo*. Jarrel refers to it as, “the long-sought formal, legal recognition of the non-cloistered, apostolic lifestyle for women religious.”¹⁴⁷

¹⁴³ Pius V, constitution *Circa pastoralis*, May 29, 1566, in *Magnum bullarium Romanum, bullarum, privilegiorum ac diplomatum Romanorum Pontificum amplissima collectio, tomus quartus, pars secunda*, Graz, Akademische, Druck-u. Verlagsanstalt, 1965-1966, 292-294. By this constitution, the Pope prohibited the erection of any religious institute of women if they did not take solemn vows and observe papal cloister. See also ID., decree *Decori*, January 24, 1570, in *Magnum bullarium Romanum, tomus quartus, pars tertia*, Graz, Akademische, Druck-u. Verlagsanstalt, 1965-1966, 96-97; P. GASPARRI and I. SERÉDI (eds.), *Codicis iuris canonici fontes*, vol. 1, Typis polyglottis Vaticanis, 1937, no. 112, 201-203.

¹⁴⁴ GALLAGHER, “The Church and Institutes of Consecrated Life,” 5- 6.

¹⁴⁵ See *ibid.*

¹⁴⁶ BENEDICT XIV, apostolic constitution *Quamvis iusto*, April 30, 1749, in *Benedicti XIV Bullarium*, vol. 3, Prati, Typographia Aldina, 1846, 49-61. With this constitution, specifically directed to the group founded by Mary Ward, known at the time as the “English Ladies,” the Pope recognized the group even though he still did not regard them as true religious. He also encouraged the local ordinaries to treat them with kindness. Such recognition was a sign that the Church was finally relaxing her stand on the status of women religious not bound by solemn vows or cloister. The document opened the way for future legislation on the same. See also M. WRIGHT, *Mary Ward’s Institute: The Struggle for Identity*, Sydney, Crossing Press, 1997, 71-72.

¹⁴⁷ L. JARRELL, *The Development of Legal Structures for Women Religious Between 1500 and 1900: A*

The Constitution is divided into three parts. The first part is the introduction. Part two addresses diocesan institutes and part three is on institutes of pontifical right. The introduction begins by recognizing the existence of the two categories of congregations of simple vows.¹⁴⁸ It then proceeds to define and distinguish them and to clarify the limits of power of their internal authority and that of the ecclesial authority over them. The last part of the introduction gives the motivation of the Constitution as is well summarized by Kelly Connors, “to clarify the limits of the bishops’ jurisdiction over the congregations, making distinction of pontifical and diocesan congregation, and give general guidelines of authority to be entrusted to each kind of institute.”¹⁴⁹

Part two, which consists of twelve points, is referred to as the first chapter and addresses the congregations of diocesan right. It specifies the areas and limits of the internal authority of these institutes and that of the bishops over them. It discusses the limits of the bishops’ authority with regard to the establishment of the congregations (nos.1-3), the expansion and spread to other dioceses (nos. 4-6), the canonical examination of candidates for admission and for profession (no. 7), and the dismissal of members (no. 8). It also outlines the role of bishops in the election of superiors (no. 9), spiritual matters and administration of sacraments (no. 10) and the auditing of financial accounts by the local bishop (no. 11). On the part of internal authority, the Constitution empowers major superiors to elect to offices, to receive and admit new members, to admit to profession and to regulate matters within their competence, in accord with the constitutions.

Study of Selected Institutes of Religious Life for Women, Canon Law Studies, no. 513, Washington, DC, Catholic University of America, 1985, 280.

¹⁴⁸ See *Conditae a Christo*, in *ASS*, 33 (1901), 341, in LANSLOTS, *Handbook of Canon Law for Women*, 246.

¹⁴⁹ K. CONNORS, *The Role of the Major Superior with Particular Reference to Apostolic Women’s Religious Institutes in the United States*, JCD thesis, Ottawa, Saint Paul University, 2011, 48.

The third part, which is chapter two, addresses congregations of pontifical right. It specifies the limits of the authority of the Holy See, that of the local bishop, and the internal authority of these congregations. The Holy See retains the power over matter reserved to it by law and by the virtue of the nature of the congregations. As the immediate external authority over such congregations, the Holy See presides over the chapter through the local bishop as its delegate (no.1). To approve the constitutions and to dispense from all vows is reserved to the Holy See (no. 2).

The jurisdiction of the local bishop over these congregations includes canonical examination of candidates for admission, regulation of spiritual matters, supervision and regulation of matters concerning public worship, faith and morals, and the supervision of the law of cloister. The internal authority regulates internal discipline of the houses, members, appointment to offices, administration of goods of the congregation, admission and dismissal of members (no. 1). The Constitution concludes with a cautionary note to the local bishops against infringing on the powers of the Holy See and those of the internal authority of both categories of the congregations in tribunal matters (no. 2).

The Constitution does not treat the subject of formation of religious women directly. There is only a brief mention of one aspect of formation, that is, the canonical examination by the local bishop prior to admission or to profession. The Constitution however presents a significant historical moment in the canonical evolution of the identity and acceptance of women religious of simple vows in the Church. For the first time in the history of the Church, a new version of an alternative way of religious life was officially recognized and approved and the Church finally came to a deeper understanding of religious vows.¹⁵⁰ The rapid changes in social,

¹⁵⁰ See GALLAGHER, "The Church and Institutes of Consecrated Life," 6.

economic and political systems especially in continental Europe motivated the rise of these apostolic congregations. The effects of civil wars and the revolution created the needs for works of mercy such as care for the sick and education, to which these congregations effectively responded. Performing such works of charity rendered the traditional monastic way of religious life impossible and yet the Church could not deny the commendable tasks carried out by these groups.¹⁵¹ The phenomenon of their growth presents to the Church a great insight of divine inspiration among the faithful and the recognition of evolution of new forms of religious life which the Church has the task to discern and approve.

The Constitution therefore can rightly be called a foreshadowing of the spirit of *aggiornamento* of Vatican II. It can also be seen as a foundational document of reference for clarifying the nature of the relationship between the religious and the hierarchy which became a major subject at Vatican II. Most of all, the document also laid the foundation for the canonical identity and place of religious life as it is understood today. The Constitution sheds great light on the treatment of women religious in the 1917 Code and it significantly influenced the legislation of this Code.

1.3.2. Stages of Formation

The 1917 Code prescribes the postulancy and the novitiate as the formal structured stages of initial formation of women religious. The Code dedicates eleven canons of the second part of Book Two, entitled “Persons,” to admission into religious institutes. This title has three chapters which cover postulancy (*CIC/17*, cc. 539-552), novitiate (*CIC/17*, cc. 553-571) and religious

¹⁵¹ See *ibid.* where the author remarks: “Leo XIII acknowledged that the circumstances of the times had called out new congregations, bound by simple vows, and dedicated to works of mercy.”

profession (*CIC/17*, cc. 572-586).¹⁵²

1.3.2.1. Postulancy¹⁵³

The 1917 Code presents postulancy as the first formal step an aspirant to religious life makes with the religious community of desire, and as a period of transition from secular to religious life.¹⁵⁴ This contact can be residential in a house of the institute (*CIC/17*, c. 540 § 1) or by means of structured series of activities aimed at deepening the interaction between the institute and the aspirant.¹⁵⁵ Even as residents in a religious house, postulants have no canonical status. They are best treated as guests waiting admission with no distinct garb required for them (*CIC/17*, c. 540 § 1).¹⁵⁶ While the 1917 Code did not prescribe any formal juridical status for postulants, the omission of postulancy invalidated admission to the novitiate (*CIC/17*, c. 539 § 1).¹⁵⁷

The period of postulancy, which lasted between six months to one year, was to help the postulants to be gradually initiated into religious life and to test their readiness and capacity to undertake novitiate formation.¹⁵⁸ The applicant had to fulfill certain requirements before being

¹⁵² See footnote no. 4.

¹⁵³ For commentary on postulancy, see J. MCGUIRE, *The Postulancy*, Canon Law Studies, no. 386, Washington, DC, Catholic University of America, 1959.

¹⁵⁴ See B. VAN ACKEN, *A Handbook for Sisters*, St. Louis, MO, B. Herder, 1930, 99.

¹⁵⁵ See G. FINTAN, *The Canon Law Governing Communities of Sisters*, St. Louis, MO, B. Herder, 1950, 191.

¹⁵⁶ See ABBO and HANNAN, *The Sacred Canons*, 541. The authors recommend a garb which is distinct from that of the novices but one which is decent and not too secular.

¹⁵⁷ See FANFANI and O'ROURKE, *Canon Law for Religious Women*, 163.

¹⁵⁸ See J. CREUSEN and A.C. ELLIS, *Religious Men and Women in Church Law*, 6th ed., Milwaukee, WI, The Bruce Publishing Co., 1958, 129.

welcomed by a religious institute as a postulant. The period of postulancy was marked by a series of acts, such as the canonical examination by the local Ordinary (*CIC/17*, c. 552), the remission of the dowry (*CIC/17*, c. 547 § 1), the observance of rules and discipline of the institute, for instance the obligation of vows and observance of the law of cloister for those ascribed to such institutes (*CIC/17*, c. 540). Despite the many juridical acts which carried canonical implications during postulancy, it created no juridical bond between the candidate and the institute. Nevertheless, it is credited for providing the necessary preparation and transition for new members as they entered religious life.

1.3.2.2. Novitiate¹⁵⁹

The second stage of formation prescribed in the *CIC/17* is the novitiate. It is a stage of formation presented in a structured manner, with detailed prescriptions on conditions and requirements for validity (*CIC/17*, cc. 542, 1°) and lawfulness (*CIC/17*, cc. 542 2°). According to *CIC/17*, c. 553, the novitiate commenced by the taking of the habit or in another manner prescribed in the constitutions. Thomas F. Purcell refers to it as the formal entry into an institute and the beginning of membership.¹⁶⁰

The purpose of the novitiate was to help the candidates familiarize themselves with religious life in the context of the institute they were ascribed to. It was, according to Purcell, “the time when novices are helped to form their mind according to the nature, character and

¹⁵⁹ For commentary on novitiate in the period of 1917 Code, see R. BALZER, *The Computation of Time in a Canonical Novitiate*, Canon Law Studies, no. 212, Washington, DC, Catholic University of America, 1945; L. VAZQUEZ, *The Common Law on the Novitiate in the Western Church from the Council of Trent to the Present*, Canon Law Studies, no. 486, Washington, DC, Catholic University of America, 1975; J. LOVER, *The Master of Novices*, Canon Law Studies, no. 254, Washington, DC, Catholic University of America, 1947.

¹⁶⁰ See T.F. PURCELL, *The Training of Members*, 12.

purpose of the institute so as to identify with it and eventually resolve to embrace it.”¹⁶¹

The novitiate programme was presented by the novice director whose qualifications fulfilled the conditions required by law (*CIC/17*, c. 559).¹⁶² Canon 559 § 2 permits the appointment of assistants if deemed necessary. The work of formation was however strictly entrusted to the director (*CIC/17*, c. 561 § 1).¹⁶³ The director carried out his or her duties under the supervision of the major superior (*CIC/17*, c. 561 § 1). The director during the novitiate year is to give a report on the progress of each novice to the major superior or the chapter according to the constitutions.

The novitiate programme which was to be delivered by the director according to the constitutions included the study of the constitutions, rules, prayer, instructions on vows and suitable exercises to root out vices and to build virtues (*CIC/17*, c. 565). As Van Acken adds, “the novitiate was [...] to test the character of the candidate, that is, inclinations and faults, and see if he is capable of practicing virtues and making sacrifices required by the institute.”¹⁶⁴ Even though not yet professed, the novices were to observe the vows (*CIC/17*, c. 561 § 2).

The 1917 Code prescribed other specifications on novitiate formation, like formation according to classes of novices (*CIC/17*, c. 558), the place of the novitiate (*CIC/17*, c. 564), and manner of erection of the novitiate house (*CIC/17*, c. 554). Other norms prescribed further requirements for validity (*CIC/17*, c. 555), specification on absences from novitiate and their implications (*CIC/17*, c. 556). The Code also had legislation on the spiritual benefits and

¹⁶¹ See *ibid.*, 11.

¹⁶² See WERNZ-VIDAL, *De religiosis*, 243.

¹⁶³ See B. VAN ACKEN, *A Handbook for Sisters*, St. Louis, MO, B. Herder, 1930, 99. See also P. TRUDEL, *A Dictionary of Canon Law*, St. Louis, MO, B. Herder, 1920, 134.

¹⁶⁴ VAN ACKEN, *A Handbook for Sisters*, 106.

privileges enjoyed by novices (*CIC/17*, cc. 556-567), on personal property (*CIC/17*, c. 568-569), right to terminate the novitiate either by the novice or the institute (*CIC/17*, c. 571 § 1), and tasks during the novitiate, especially of lay brothers (*CIC/17*, c. 565 §§2, 3).

The Code specified four ways of conclusion of the novitiate: free departure, dismissal, admission to profession, or extension of probation for a period not beyond six months (*CIC/17*, c. 571 § 2). For those admitted to first profession, they would begin the immediate preparation for profession which required at least an eight days retreat. Those who departed or were dismissed, had their dowry and any other personal property not yet used, restored to them. They were not liable to any expenses incurred during their stay in the institute.

1.3.2.3. Religious Profession¹⁶⁵

The 1917 Code presents religious profession as an elaborate juridical act preceded by a series of other external acts required for its validity and lawfulness. Admission to vows was qualified by the presence of all the necessary conditions and requirements for validity (*CIC/17*, cc. 572-574). The vows which were public, included the three evangelical counsels, which were permanent in nature and were professed in approved institutes in the name of the Church according to the prescription of law.¹⁶⁶ Vows professed were distinguished according to the nature of the institute of ascription (*CIC/17*, c. 488 2°).¹⁶⁷ Vows would either be simple or solemn, professed as temporary and then in a definitive fashion after the elapse of the required

¹⁶⁵ For commentary on religious profession, see, for instance, F. WOLFGANG, *The Act of Religious Profession*, Canon Law Studies, no. 63, Washington, DC, Catholic University of America, 1931; V. MUZZARELLI, *De professione religiosa a primordiis ad saeculum XII*, Rome, Apud Piam Societatem Sancti Pauli, 1938; P.D. JOHNSON, *Equal in Monastic Profession: Religious Women in Medieval France*, Chicago, IL, University of Chicago Press, 1991.

¹⁶⁶ O'NEILL, *The Dismissal of Religious in Temporary Vows*, 1-2.

¹⁶⁷ See LANSLOTS, *Handbook of Canon Law for Women*, 75.

time and with proof of suitability of the candidate by the institute (*CIC/17*, c. 575).

The Code required that the profession take place in the novitiate house. The profession was made according to the prescription of the rite of profession prescribed in the constitutions (*CIC/17*, c. 576).¹⁶⁸ It was to be made expressly before the Church and in the hands of the competent major superior who receives the commitment on behalf of the institute.

The act of profession resulted in a series of privileges, mutual rights and obligations for both the religious and the institute (*CIC/17*, cc. 592).¹⁶⁹ The Code made distinction between effects of simple (*CIC/17*, cc. 578-581, 583) and solemn vows (*CIC/17*, c. 579, 582).¹⁷⁰ A prescription on causes and manner of sanation of invalid profession is given in canon 586. After profession either temporary or definitive, of solemn or simple vows, the religious was expected to observe the rules and obligations arising from the commitment. For women religious, the first profession marked the end of formal formation. Qualification for final commitment would be based on the assessment by the competent superior on the suitability of a candidate for undertaking the lifelong obligations of religious life.¹⁷¹

1.3.3. The Custom of Dowry of Women Religious

Dowry of women religious refers to the capital entrusted to the institute by a new member so that the revenue may serve for her support and the capital sum as her security and

¹⁶⁸ See LANSLOTS, *Handbook of Canon Law for Women*, 79. See also ABBO and HANNAN, *The Sacred Canons*, 591; E. FOLEY, *Rites of Religious Profession: Pastoral Introduction and Complete Text*, Chicago, Liturgy Training Publications, 1989.

¹⁶⁹ See ABBO and HANNAN, *The Sacred Canons*, 590.

¹⁷⁰ See VAN ACKEN, *A Handbook for Sisters*, 228.

¹⁷¹ See L. VOEGTLE, *Canonical Reasons for the Rejection of Candidates to Final Vows*, 62. See also O'NEILL, *The Dismissal of Religious in Temporary Vows*, 86.

guarantee of material support in the event that she leaves after admission.¹⁷² The dowry was not however a payment to buy entry into a monastery such that those who were unable to pay it would not be admitted. Bachofen clarifies, “it was not a donation or offering to gain entrance but only a means of guaranteeing necessary support to a new member.”¹⁷³ Thomas M. Kealy adds, “the dowry served as a dependable financial income for economic stability for the monastery and it was an emergency fund in case the member left [...] for her temporary support as she is in transition.”¹⁷⁴

The custom of dowry of women religious came into canonical legislation in the 16th century as a practice which specifically concerned women religious even though some monasteries for men accepted some form of voluntary donations from the members.¹⁷⁵ The practice evolved due to three main reasons. The first reason is that some monasteries admitted more members than they could support so the dowry served as means of such required support.¹⁷⁶ The second reason is that some monasteries had become so poor and so could not adequately sustain the members. Lastly, payment of the dowry was necessitated by abuses which had crept into the admission of members.¹⁷⁷

¹⁷² See BACHOFEN, *A Commentary on the New Code of Canon Law*, 224-225.

¹⁷³ Ibid., 225.

¹⁷⁴ T.M. KEALY, “Dowry,” in *New Catholic Encyclopedia*, 2nd ed., vol. 4, Washington, DC, Catholic University of America, 2003, 889; see also F.X. WERNZ and P. VIDAL, *De religiosis*, Rome, Gregorian University Press, 1933, 221.

¹⁷⁵ KEALY, *Dowry of Women Religious*, 8.

¹⁷⁶ Joseph Francis O’Neill explains that those who were admitted into the monastery within the limits of the required number were referred to as the numerary candidates and they were to pay only the required amount. Those who were admitted beyond the required number were called the supernumerary candidates and were required to pay double the amount of dowry. This distinction also applied to three siblings admitted to the same monastery. The first two would be admitted as either numerary or supernumerary candidates depending on the availability of space in the monastery but the third sister would be admitted as a supernumerary. See O’NEILL, *The Dismissal of Religious in Temporary Vows*, 21.

¹⁷⁷ See *ibid.*, 3.

Out of the fourteen canons on postulancy, the 1917 Code dedicates six canons on the custom of dowry (*CIC/17*, cc. 547-552). This shows a rather striking canonical weight given to the custom in the legislation of admission of members into religious institutes. The canons discuss the time and manner of administration and the alienation of the dowry. It is prescribed as a prerequisite for admission into the novitiate and to first profession.¹⁷⁸ For institutes of simple vows its amount was to be determined by lawful constitutions (*CIC/17*, c. 547 § 3) and by lawful constitutions or lawful customs in monasteries of nuns (*CIC/17*, c. 547 § 1).¹⁷⁹ The amount fixed in either monasteries of nuns or institutes of simple vows could not be raised or waived in part or in full without permission from the Holy See for institutes of pontifical right or by the local bishop for diocesan institutes (*CIC/17*, c. 547 § 4).¹⁸⁰

On the administration of the dowry, the common law required that it was to be invested in a safe and productive form valid according to civil law (*CIC/17*, c. 547 § 2).¹⁸¹ The investment was to be done by the superiors with their councils and with the consent of the local ordinary (*CIC/17*, c. 547 § 9). The recommended place for safe keeping was the residence of the general or provincial superior (*CIC/17*, c. 550 § 1). The dowry was to be strictly preserved and before the death of the sister, its use was prohibited. The Code mentioned prohibitions even for justified reasons like building houses or payment of debts (*CIC/17*, c. 549). The local Ordinaries were empowered by law to supervise the preservation of the dowry by institutes and, on their

¹⁷⁸ PAUL VI, apostolic letter *Pastorale munus*, November 30, 1963, no. 37, in *AAS*, 56 (1964), 1- 11, English translation in *CLD*, vol. 6, 370-378.

¹⁷⁹ Kealy explains that institutes of simple vows had the freedom of determining if they needed the dowry and of what amount, as they were assured of material support from the income generated by their active apostolic works, unlike the monasteries of nuns which depended on it for their livelihood. See KEALY, "Dowry," 869.

¹⁸⁰ See BACHOFEN, *A Commentary on the New Code of Canon Law*, 225.

¹⁸¹ Bachofen explains that this required a notary and a public witness. See *ibid.*

visitation, superiors were required to present the accountings of the dowry (*CIC/17*, c. 549 § 2).

On alienation of the dowry, the Code presented three situations under which this could happen. First, at the death of the sister, the institute acquired the dowry irrevocably (*CIC/17*, c. 548). Secondly, if the sister left the institute, the dowry was restored back to her without the interest which has accrued from it (*CIC/17*, c. 551 § 1). Thirdly, if the religious, by apostolic indult, transferred to a new institute at the time of profession, the dowry was also transferred to the new institute. However, if she transferred to another monastery of the same order, the dowry went to the new monastery from the day she transferred (*CIC/17*, c. 551 § 2).¹⁸²

The underlying principle in the practice of payment of dowry of women religious is the foreseen care and support for both the individual religious and the institute for the time the member belongs to an institute and for the occasions of separation from the institute in whatever manner and whatever motivation. This principle gradually evolved as canon 702 in the 1983 Code which urges charity and equity for a separated member of the Institute. Analysis of the principle in the light of the status of women religious shows that the Church was very cautious about the welfare of the religious in case they separated from the institute. It is a principle which protected the members as well as the institute. It took care of unfortunate situations which might arise if members returned to secular life and became destitute. It also safeguarded the institute from abuses of those who only wanted to enjoy life in the monasteries. It demonstrated responsibility and seriousness on the part of the members and a positive contribution to the welfare of all.

1.4. The Impact of Vatican II on Consecrated Life

¹⁸² See KEALY, "Dowry," 889. See also ABBO and HANNAN, *The Sacred Canons*, 548.

The spirit of Vatican II, as Pope John XXIII rightly states, was that of *aggiornamento*, a time of renewal and of new thinking by the Church.¹⁸³ The Church embarked on the huge project of renewing herself in all aspects including religious life. The Council issued several documents which facilitated the implementation of the renewal process. The chief documents with regard to renewal of religious life are: the Dogmatic Constitution on the Church *Lumen gentium*, the Decree on the Up-to-date Renewal of Religious Life *Perfectae caritatis*, Norms for Implementing the Decree on the Adaptation and Renewal of Religious Life, *Ecclesiae Sanctae*, II, and the Instruction on the Renewal and Adaptation of Formation for Living the Religious Life *Renovationis causam*. These documents had great impact on religious life. During the celebration of the Council, as E. Gambari notes, “they presented [...] a period and a school of formation for the entire Church.”¹⁸⁴

1.4.1. Dogmatic Constitution *Lumen gentium*

Promulgated on November 21, 1964, as a constitution,¹⁸⁵ it is one of the principal documents of the Second Vatican Council. The document presents a novelty to the understanding

¹⁸³ See McDONOUGH, *Religious in the 1983 Code*, 36. For more commentary on Vatican II and its impact on consecrated life, see, for instance, G.S. GIBSON, “*Called by the Lord*,” *The Theme of Vocation in Lumen gentium*, Rome, Pontificia Studiorum Universitas a S. Thoma Aquinate in Urbe, 1990; D. HOFFMAN, *Consecrated Life: Contribution of Vatican II*, Bandra, St. Pauls, 2006; E.R. MASTERMAN (ed.), *Religious Life: A Mystery in Christ and the Church. A Collated Study according to Vatican Council II and Subsequent Papal and Ecclesial Documents*, New York, Alba House, 1975; M.R. WILTGEN (ed.), *The Religious Life Defined: An Official Commentary on the Deliberations of the Second Vatican Council*, Techny, IL, Divine Word Publications, 1970; J. CASTELLANO, “*Lumen gentium – Perfectae caritatis – Vita consecrata*: Dynamic Accord and Innovation in Three Texts of the Magisterium on Consecrated Life,” in *Consecrated Life*, vol. 22, no. 1 (2000), 161-181.

¹⁸⁴ GAMBARI, *The Religious Adult in Christ*, 1971, 21.

¹⁸⁵ Morrissey remarks that it is not clear why Vatican II documents, which had legislative content and which to date have profound impact on the entire Church, were published in categories of constitutions, decrees, declarations and messages. He however refers to the constitutions, especially the pastoral and dogmatic ones, as fundamental documents addressed to the universal Church. See F.G. MORRISEY, *Papal and Curial Pronouncements: Their Canonical Significance in Light of the 1983 Code Canon Law*, 2nd ed., revised and updated by M. THÉRIAULT, Ottawa, Faculty of Canon Law, Saint Paul University, 2001, 21.

of ecclesiology by describing the Church as the people of God bonded together in communion and called to holiness (*LG*, nos. 39-42). The Church is a complex social reality of persons with diverse status and conditions who possess a variety of charismatic gifts which are at the service of the Church (*LG*, no. 1). This document is divided into eight chapters which discuss the hierarchical structure of the Church, the nature of the people of God and the universal call to holiness.

Chapter six which covers numbers forty-three to forty-seven, deals with religious life. The Chapter is placed after the description of the Church as the people of God founded on Christ, followed by the titles: Hierarchical Structure of the Church (*LG*, nos. 18-29), Laity (*LG*, nos. 30-38) and Universal Call to Holiness (*LG*, nos. 30-38). It appears to be placed last in the order of the structure of the visible Church because what follow is the concept of the mystical Church and the role of Mary. The conciliar text seemed to be conscious of identifying religious life as the state which has its own source from the already described structures within the Church. It is a state of life which operates within the Church but is not a structure of the Church itself.¹⁸⁶

Chapter seven describes the pilgrim nature of the Church and explains the mystical union between the visible and the invisible Church. The last chapter is dedicated to the Virgin Mary as the Mother of God and the Mother of the Church. Her immaculate conception presents her role in redemption and her continuous intercession for the Church.

Lumen gentium no. 43 presents religious life as a divine gift motivated by the Holy Spirit in the founders' charism.¹⁸⁷ The document emphasizes the role of the hierarchy to protect this gift and those who live it. *Lumen gentium* 44 describes religious life by its essential elements. It

¹⁸⁶ E. McDONOUGH, "Lumen Gentium's Chapter Six: Religious," in *RfR*, 52 (1993), 927.

¹⁸⁷ See *ibid.*, 929, where the author remarks that *LG* does not use the word "charism" but affirms its significance as a means to describe the specific path to holiness to which the religious are called.

emphasizes the nature of the evangelical counsels and the obligations which arise from professing them. *Lumen gentium* 45 addresses the rather delicate subject of the relationship between religious institutes and their hierarchical authority. Presented in the context of divine mandate and a spirit of service, the Church authority has the supervisory role over consecrated life in the Church. In this regard, the document further reaffirms the notion of exemption but explains that its motivation should be on the common good of the Universal Church.

Lumen gentium no. 46 explains the transcendent nature of the evangelical counsels professed and lived by consecrated persons. The document presents these counsels as a perfect imitation of the beatitudes. To those who live them it is a means of perfection of charity in their apostolic works. The vows are presented in their Christo-theological nature. *Lumen gentium* no. 47, which is the conclusion of the document, is an exhortation by the council to members of consecrated life to persevere in their state of life.

Lumen gentium has treated consecrated life in the context of the structure of the Church and the call to holiness. It is a powerful demonstration of the solicitude of the Church in claiming the identity, role and place of consecrated life in the Church in a most solemn way. Through the divine motivation of the Holy Spirit, consecrated life is recognized and respected. The supervisory and pastoral roles of the Church authority are specified and the place and dignity of religious life is re-affirmed.

The document does not address formation of religious directly. Nevertheless, by presenting the identity, the role and place of consecrated life in the Church with utmost clarity, it provides the foundational basis and material for formation. The training and orientation of religious in temporary vows, who undoubtedly are at the stage when apostolic experience may involve interaction with ecclesiastical authority and clarity of their roles, will eliminate obstacles

which may hinder successful and effective service. The document also presents the essential elements of religious life based on the life of Christ himself. Such knowledge, well presented in the context of formation, is bound to help religious in temporary vows to have a deeper understanding and appreciation of their identity and its implication in the life of the Church.

1.4.2. Decree *Perfectae caritatis*

The conciliar decree *Perfectae caritatis* was issued on 28 October 1965, almost one year after *Lumen gentium* as a follow up of chapter six of the latter. It had to undergo several changes in several drafts before it finally reached its final version.¹⁸⁸ *Perfectae caritatis* was especially dedicated to the up-to-date renewal of religious life. Like all other aspects of the Church, religious life had to undergo renewal so that the obsolete and irrelevant aspects which were obstacles to conducive growth into holiness or availability for mission be discarded. There was also need to replace legalism and ritualistic modes of life with newness which could match the present realities of the world.¹⁸⁹

¹⁸⁸ The first draft of *Perfectae caritatis*, prepared by the pre-conciliar Commission entrusted with the task of preparing a document which would present the elements of religious life to be considered for up-to-date renewal, was entitled, *De statibus perfectionis acquirendae*. This *schema* was never given audience at the first conciliar meeting because of its lengthy form, its overly juridical content and the apparent absence of the charismatic nature of religious life. This called for further brevity and modification of the *Schema*. See L.M. GUTIERREZ, "Processus historico-doctrinalis decreti conciliaris de acomodata renovatione vitae religiosae," in *Commentarium pro religiosis*, 45 (1966), 19-20. A second draft, *De religiosis*, was produced and distributed to the council members in April 1963. This second *Schema* was again shortened by the Commission to the essential elements of religious life. It was however criticized for including secular institutes. This called for more changes which resulted in the third *Schema* with the same title as the first, *De statibus perfectionis acquirendae*. See J. BEYER, "Historia decreti 'Perfectae caritatis,'" in *Periodica*, 55 (1966), 436. This draft too met some objections. It was considered by the Commission to over-concentrate on the call to renewal at the expense of losing the essential doctrinal elements of religious life. A fourth *Schema* with the title *De accomodata renovatione vitae religiosae* was then drafted in 1964. This draft underwent some small modifications and was finally passed as the definitive text of the decree *Perfectae caritatis*. See Y. SUGUWARA, *Religious Poverty from Vatican II Council to 1994 Synod*, Rome, Editrice Pontificia Università Gregoriana, 1997, 74-94.

¹⁸⁹ See M.B. CASEY, *The Approval of New Forms of Consecrated Life in the Light of Canon 605*, JCD thesis, Ottawa, Saint Paul University, 200, 69.

The document is divided into twenty-five numbers which treat various aspects of religious life. It has a heavy Christological accent of the tone of *Lumen gentium* (no. 46). It begins by expounding on the concept of religious life and by outlining the criteria for renewal, and the principles drawn by the Commission for the Revision of Canon Law for Religious (*PC*, nos. 1-2). The decree identifies the aspects for renewal as those on which the lives of members are structured, for instance, the constitutions and rules and the rhythm of life (*PC*, no. 3), and calls for the cooperation of all members in the renewal process (*PC*, no. 4). It reaffirms consecration by profession of the evangelical vows as a divine gift, a fuller expression of baptismal consecration and a means of total dedication to God and to his service (*PC*, no. 5). It points to prayer, liturgy, sacramental life and meditation on Scripture as integral aspects of religious life (*PC*, no. 6).

The decree distinguishes the different forms of religious institutes with their distinct apostolates and way of life (*PC*, nos. 7-11) and explains the evangelical counsels and their implications (*PC*, nos. 12-14). It also points out the significance of community life (*PC*, nos. 15-16) and of the religious garb (*PC*, no. 17). The decree stresses the need for ongoing formation characterized by adequate education and meaningful and effective apostolic works (*PC*, no. 18). It also gives directions on issues of unions, of mergers and of founding new institutes (*PC*, nos. 19-22). It urges cooperation among institutes through their conferences of major superiors (*PC*, no. 23) and emphasizes vocation promotion, especially by means of personal witness of the religious (*PC*, no. 24). Lastly, it applauds the ecclesial significance of religious institutes (*PC*, no. 25).

The subject of formation is treated in *Perfectae caritatis*, no. 18. The norms which eventually translated into canons 659-661 of the 1983 Code, have their basis in the opening

words of *Perfectae caritatis*, no. 18 which state:

The up-to-date renewal of institutes depends very much on the training of religious. For this reason, non-clerical religious men and religious women should not be assigned to apostolic works immediately after the novitiate. Their religious, apostolic, doctrinal and technical training should rather, be continued, as is deemed appropriate, in suitable establishments. They should also acquire whatever degrees they need.¹⁹⁰

The decree showed how the Council acknowledged the necessity for a plan for formation for lay religious that would open the way for a more perfect and complete maturity of the personality of the religious. By this decree, the Church, in a formal way, recognized that on-going formation of religious after the novitiate in doctrinal, spiritual and practical aspects with possibilities of appropriate academic qualifications is an intrinsic part of religious life. This formation is to be harmonized and designed according to the nature of the institute, the intellectual capacity of the individual, circumstances, time and place of persons.¹⁹¹ The superiors must, as far as this is possible, provide for them the opportunity, resources and time to do this. Elio Gambari remarks that the character of the text of *Perfectae caritatis*, no. 18 is a juridical norm which has the force of law and, as such, is binding on all institutes. He firmly states, “we are not dealing with simple exhortation, or counsel, or recommendation. Nor is this a simple comment on the necessity of prolonging formation or a general call to the fulfillment of a duty.”¹⁹²

Perfectae caritatis as a whole presents a hallmark in the history of the Church with

¹⁹⁰ In *AAS*, 58 (1966), 710, in *FLANNERY I*, 621.

¹⁹¹ Commenting on the decree, Paul Molinari notes: “an active religious must be fully integrated. The training therefore, should create progressive and organic unity in the religious personality between spiritual life, professional culture, and knowledge of the world” (P. MOLINARI, “*Perfectae caritatis*: The Conciliar Decree on the Renewal of Religious Life,” in *The Way Supplement*, 6 [1966], 58).

¹⁹² GAMBARI, *The Religious Adult in Christ*, 25.

reference to religious life. It provides the criteria for a renewal of religious life in a model of equilibrium between the call to return to the sources and the quest for adapting new ways of responding to the needs of the Church and of the world. As a yardstick for the desired renewal, the document offers to religious communities a firm ground from which to venture into the process. It affirms the identity and the role of religious life in the process of renewal. It also distinguishes the various forms of religious life and respects their uniqueness and peculiarity. By emphasizing the principle of subsidiarity, the Church acknowledges and admits that religious communities best serve the interests of the Church when they carry out their apostolic work according to their special character, purpose, charism and nature.¹⁹³ It is also a call “to return to sources,” a timeless message which even in the post-conciliar period has remained the constant call by the Church to the religious.¹⁹⁴

Edward O’Connor explains that the effectiveness of the adaptation envisioned by *Perfectae caritatis*, no. 2 (d) would only be possible when institutes and their members have the proper understanding of men, of the conditions of the times and of the needs of the Church, coupled with wise decisions, animated by faith and apostolic zeal.¹⁹⁵ Religious persons, as people entrusted with evangelization of the world, must know the world and its circumstances as such affect the mentality of those who become religious and those whom they serve.¹⁹⁶

The force of magisterial authority which accords the decree its juridical nature obliges all religious institutes to renew all aspects of their lives, including formation. The description of the

¹⁹³ See E. O’CONNOR, “Vatican II and the Renewal of Religious Life,” in *RfR*, 26 (1967), 412.

¹⁹⁴ See *VC*, nos. 26 and 33, in *AAS*, 88 (1996), 380-385, 399, 407, in *L’Osservatore Romano*, English ed., April 3, 1996, supplement, 5 and 6, respectively.

¹⁹⁵ O’CONNOR, “Vatican II and the Renewal,” 410.

¹⁹⁶ See *GS*, nos. 1-11, in *AAS*, 58 (1966), 1025-1034, in *FLANNERY I*, 903-912, on the discussion of the solidarity of the Church with the whole human family and the situation of man in the modern world.

identity of religious life with its essential elements provides a valuable resource for a formation programme. Noteworthy is the substantial content of the document which was imported to the 1983 Code of Canon Law. To date no discussion on religious life is complete without mentioning *Perfectae caritatis*.

1.4.3. Decree *Ecclesiae Sanctae*

Decree *Ecclesiae Sanctae*, directed to the whole Church, promulgated by Pope Paul VI as a *motu proprio*¹⁹⁷ on 6 August 1966, had as its objective the implementation of four other conciliar documents. The decree came as a follow up on the recommendations put forward by the commissions which had been established by the Council to apply their expertise to determine, in the best way possible, how the norms of the four other decrees could be applied on a temporary basis awaiting definitive norms to be promulgated in the Code which was under revision. The Holy Father explains this when he states, “we command that they may be observed by way of experiment, that is, until the new Code of Canon Law is promulgated, unless in the meantime some other provision is made by the Apostolic See.”¹⁹⁸

The decree was presented in two titles, referred to as *Ecclesiae Sanctae, I* and *Ecclesiae Sanctae, II*.¹⁹⁹ The second title was intended specifically for implementing *Perfectae caritatis*. It is divided into two parts. Part one, which has five sections, gives the directives on the manner of

¹⁹⁷ *Ecclesiae Sanctae, II* was published as a decree issued in the form of *Motu proprio*. Elizabeth McDonough explains that the canonical weight of canonical documents depend on their source, their precise category and the form in which they are issued. *Motu proprio* is a legislative document from the Roman Pontiff written on his own initiative which specifies the manner in which a more general legislation is to be applied or interpreted. The document was to indicate how the general chapters which had been mandated by *Perfectae caritatis* were to be implemented and being in the category of decree accorded it its legislative nature. See E. McDONOUGH, “Conciliar and Post-conciliar Documents on Consecrated Life,” in *RfR*, 52 (1993), 780.

¹⁹⁸ See *ES I*, Introduction, in *AAS*, 58 (1966), 758, in *FLANNERY I*, 592.

¹⁹⁹ This decree was promulgated for the implementation of *Christus Dominus*, *Presbyterorum ordinis*, *Perfectae caritatis* and *Ad gentes*. See *ibid*.

promoting renewal and adaptation of religious life. Section one places the responsibility for renewal on institutes themselves by means of general chapters or *synaxes*. These chapters are to be facilitated by internal authority and carried out with the due consultation of all members to ensure the participation of all (*ES II*, nos. 1-11).

Section two treats the revision of the constitutions or *typika*. On this, the decree instructs that juridical and theological elements of religious life are to be blended together, the founder's charism preserved and laws not unduly multiplied during the revision of the constitutions (*ES II*, nos. 12-14).

Section three addresses the criteria for renewal and adaptation. The decree directs that for renewal, the norms of *Lumen gentium* and *Perfectae caritatis* are to be applied (*ES II*, no.15). It recommends ongoing spiritual, theological, scriptural formation from the time of novitiate. It also emphasizes in-depth study and analysis of all elements of religious life and a genuine understanding of the founder's charism so that it is preserved and freed from what the Holy Father referred to as "alien elements"(*ES II*, nos. 16-17).

Part two of the decree focuses on some particular points of consideration in the process of renewal. The particular points are specified as, prayer, liturgy of the hours, life in common, formation, poverty, enclosure, reconfiguration of institutes and union of major Superiors. The decree emphasizes mental prayer over devotions and recitation of the liturgy of the hours as means of sharing in the liturgical life of the Church (*ES II*, nos. 21-21). Penance and mortifications are to be undertaken according to the demands of health and modern circumstances (*ES II*, no. 22). On poverty, norms of *Perfectae caritatis* are to be applied and institutes of simple vows are to determine in their particular law how personal property is to be regulated (*ES II*, nos. 23-24). The rhythm of life in community is to be characterized by

flexibility and leadership structures are to promote equality in representation as much as it is possible (*ES II*, nos. 25-26). The law of cloister is to be upheld in both the Latin and Eastern Churches. The manner of separation from the world is left to proper law to determine (*ES II*, nos. 30-31). The decree however abolished all quasi-forms of cloistered life (*ES II*, no. 32). On unification and suppression of institutes, the decree instructs on adequate spiritual, psychological and juridical preparation of all members. The internal authority is to proceed by means of consultation, seeking necessary assistance from competent authority, keeping in mind the good of the Church and of the institute and its members (*ES II*, nos. 39-41). The decree urges cooperation among institutes themselves and with ecclesiastical authority (*ES II*, nos. 42-43).

On formation the decree recalls *Perfectae caritatis*, no. 18. It re-emphasizes that formation is to be configured according to the specific character of the institute and extended with adequate time for experimentation (*ES II*, nos. 33). The decree instructs religious institutes to observe with necessary adaptations, the directives prescribed for priestly formation (*ES II*, nos. 34). It reaffirms the necessity and significance of post-novitiate formation. The decree calls for appropriate formation for the extern sisters in purely contemplative monasteries. In apostolic institutes, there is emphasis on formation throughout the time of temporary vows, given in appropriate centres and with educational value aligned with the character and mission of each institute, aimed at introducing the candidates to the manner of life that is to be theirs later on (*ES II*, nos. 35-36.) The decree encourages inter-institute collaboration in formation motivated by the spirit of fraternal charity, and recognizing the reality of limitations and inadequacy of formation resources and personnel (*ES II*, no. 37). It calls for the revision of the formation programme with necessary prudence and enough time for experimentation (*ES II*, no. 38).

An analysis of the document confirms its faithfulness to the conciliar spirit it endeavours

to express. The decree provides clearer directives on how the implementation was to be carried out. There is clarity on the limits of roles of ecclesiastical and internal authority over institutes and the uniqueness of institutes is recognized. The decree also expresses the need for formation during temporary vows and the programme and structure for this formation. From the document, one can see the making up for the *lacuna* in post-novitiate formation for lay religious that existed in the 1917 Code and the inspiration of canon 660 of the 1983 Code. Even though the content of *Ecclesiae Sanctae, II* did not find direct import into the 1983 Code, the decree had great impact on the understanding of religious life. It served as a powerful call to religious institutes to make necessary renewal of their life, as E. McDonough affirms: “its plan for implementation of [...] *Perfectae caritatis* set the stage for much of what is contained in the current universal law.”²⁰⁰

1.4.4. Instruction on the Renewal and Adaptation of Formation for Living the Religious Life *Renovationis causam*

This document was issued as an instruction²⁰¹ by the then Sacred Congregation for Religious and Secular Institutes on the 1st February 1969. It was published as a response to the requests of religious institutes made through the Union of Superiors General on how best they could implement the desired renewal of the various stages of formation. Difficulties had arisen due to the diversity of institutes and of their apostolates which made it difficult to have common

²⁰⁰ MCDONOUGH, *Religious in the 1983 Code*, 44.

²⁰¹ Instructions, according to c. 34, are directed to those who implement or execute the law. They indicate how a norm[s] in question is [are] to be implemented. They are not laws in themselves and they cannot derogate from the law. See J.M. HUELS, “A Theory of Juridical Documents Based on Canons 29-34,” in *Studia canonica*, 32 (1998), 350. McDonough notes that *Renovationis causam*, though issued as an instruction, made major alterations on the existing legislation on formation of religious, appearing to go beyond the confines of its definition. See MCDONOUGH, “Conciliar and Postconciliar Documents on Consecrated Life,” 783. Morrissey remarks that this type of document is the most difficult to interpret. Since it is not legislative in nature, its application may allow for more leeway than would a decree. See MORRISSEY, *Papal and Curial Pronouncements*, 28.

laws. While the initiatives of implementation of directives of *Ecclesiae Sanctae* and *Perfectae caritatis* were already underway, many institutes felt the need to have practical guidelines on how to go about the renewal of formation, especially in the context of the mentality of young religious and the present day needs. The instruction was issued to give guidelines on implementation of norms on formation on a temporary and experimental basis up to the time of the promulgation of the forthcoming revised Code of Canon Law.²⁰² The document was addressed to religious in the strict sense (*RC*, no. 3).

The instruction is divided into four parts: the introduction, guidelines and principles for application of norms for renewal of formation (*RC*, nos. 1-9), special norms (*RC*, nos. 10-38) and application of special norms.

The introductory part gives a brief background of the motivation of the document. The opening remarks explain the magisterial role of the hierarchy in interpreting the evangelical counsels and of determining the stable manner of living them within religious institutes. It then gives the reasons which justify renewal of formation similar to *Perfectae caritatis*, no. 18.

Part One, entitled Some Guidelines and Principles, gives directives on the manner of formation. It explains that formation is to take into account the nature, character, purpose and spirit of the institute. The document permits institutes to be flexible in adapting methods of formation which best suit individual institutes taking into account their diversities (*RC*, no.1). It empowers institutes to replace temporary vows with some other similar bonds on account of the required maturity of the candidate (*RC*, no. 34).²⁰³ The document emphasizes the significance of

²⁰² *RC*, Introduction, in *AAS*, 61 (1969), 104, in *FLANNERY I*, 635- 636.

²⁰³ The provision for replacing temporary vows with other bonds did not find its way into the revised Code. Even though it appeared in the 1977 draft as canon 93, it was dropped in the 1980 draft. The final draft only talks of temporary vows of the three evangelical counsels. See *Communicationes*, 13 (1981), 170-171. See also CONGREGATION FOR RELIGIOUS AND FOR SECULAR INSTITUTES, decree *Praescriptis canonum*, February 2, 1984, in *AAS*, 76 (1984), 500, English translation in *CLD*, vol. 11, 91-92.

the pre-novitiate as the preparatory stage for novitiate. It addresses special cases in the novitiate formation, like transfer of novitiate, formation of one novice or few novices. It also directs gradual and prolonged formation during temporary vows (*RC*, nos. 4-5).

Part Two of the document, Special Norms, acknowledges the phases of formation: pre-novitiate, novitiate and the period of temporary vows up to the time of perpetual profession (*RC*, no. 10). The Instruction specifies the purpose and the structure of formation in terms of place, the necessary requirements, personnel, the role of internal authority, the programme, duration, assessment and conclusion of each stage of formation. Emphasis is put on the maturity of candidates as the proof for readiness for religious life, as opposed to the 1917 Code which stressed the required age (*RC*, no. 11, 2). The document obliges the competent superior to admit only those with right psychological dispositions and proof of the required maturity for undertaking religious life in the institute (*RC*, no. 14). It grants the competent major superior, while respecting the privacy and reputation of the candidate, the faculty to seek the services of experts in difficult cases (*RC*, no. 11, 3). The significance of the novitiate is recognized as the stage of initiation into religious life (*RC*, no. 13, 1).

Part two also treats of the nature of temporary vows. It gives directives on the manner of replacing temporary vows with other similar bonds, clarifies the object of the vows and the obligations which arise from professing them, and specifies the duration of temporary vows (*RC*, nos. 34-37). Lastly, it gives instructions on the re-admission of those who leave the institute legitimately (*RC*, no. 38).

The last part of the document, Application of Special Norms, affirms the force of the

current common law except in those matters from which the instruction derogates.²⁰⁴ It cautions that the faculties granted may only be executed by the superiors general and those equivalent to them according to the law. In the event that they are impeded, the faculties may be delegated to those who take their place in accordance with the law.

A review of the instruction reveals a great shift in the understanding of the Church with regard to the identity of religious life and the formation of its members.²⁰⁵ It manifests a commendable faithfulness to the conciliar spirit and brings out a beautiful blend of the message of *Perfectae caritatis* and *Ecclesiae Sanctae*. There is undoubtedly the motivation of protecting the concept of religious life so laboriously created by the council when the instruction discusses the topic of formation in relation to other aspects of religious life.²⁰⁶

The document portrays a great spirit of solicitude of the Church in her magisterial role as guide and teacher. The wisdom of the Church is here displayed in discerning the necessity of having experimental principles which are open to suggestions and further modifications before they are finally passed as laws. Even though the norms are temporary and experimental in nature, they retain the force and firmness which could be equated to law. They are, however, only operational before the promulgation of the revised Code. Elio Gambari affirms this when he explains, “the fact that the Holy See has permitted them does not mean it will adopt them.”²⁰⁷

²⁰⁴ Instruction *Renovationis causam*, which was intended to broaden the canonical norms on formation in the context of the ongoing renewal of religious life called for by the Church, did introduce new changes to the existing norms on formation. These innovations did not possess, however, the force of law and were applied only on experimental basis awaiting the promulgation of the revised Code. They included the possibility of other bonds than vows at first profession (*RC*, no. 34) which derogated from the law in force that recognized only vows (simple or solemn) as the bond of religious profession (*CIC/17*, c. 574). Also, *RC*, no. 37 [1] established a longer period (up to nine years) for the period of temporary profession which derogated from what was prescribed in the norm of *CIC/17*, c. 574 which limited the total duration of temporary vows to six years.

²⁰⁵ See E. GAMBARI, *The Updating of Religious Formation*, Boston, Daughters of St. Paul, 196, 47.

²⁰⁶ See *ibid.*

²⁰⁷ See *ibid.*, 49.

The document demonstrates the spirit of flexibility and subsidiarity which the Church empowers the institutes to employ in the process of renewal. It offers a wide range of choices in implementing norms on formation. Compulsory norms are reduced to the minimum in the juridical framework.²⁰⁸ Institutes have the freedom to apply the norms on an experimental basis, fully or in part, depending on what is applicable to them, and several faculties that are granted to the major superiors is a sign of the seriousness with which the Church considers the formation of religious. The document shows the emphasis by the Church on formation which is person-oriented, unified, extended over a period of time and undertaken after sufficient preparation.

For the first time special attention is given to formation of lay religious during the time of temporary vows. The Church in this document gives official recognition of the exigency of formal and structured formation during the period of temporary vows. The nature and object of vows are specified, the probationary character of this formation is highlighted and the equal status of all professed is explained. Formation during temporary vows is to be orientated toward perpetual profession. Directives are given on difficult cases where recourse to experts is necessary. This shows the recognition of the Church that formation of religious also includes assessment of psychological health and maturity which may justify dismissal.²⁰⁹ The directives

²⁰⁸ See *ibid.*, 48.

²⁰⁹ For more commentary on assessment for admission of candidates to religious life, see for instance, J.F. GALLEN "Dismissal of Religious for Health Reasons," in *RfR*, 25 (1966), 616-1105; L. GENDRON, "Some Moral Problems Connected with Psychological Testing of Religious, Seminarists and Candidates," in *Linacre Quarterly*, 46 (1979), 167-177; R. HILL, "Screening Candidates: Need to Know," in *RfR*, 45 (1986), 458-462; G. INGELS, "Protecting the Right to Privacy When Examining Issues Affecting the Life and Ministry of Clerics and Religious," in *Studia canonica*, 34 (2000), 439-466; F.G. MORRISSEY, "Issues of Confidentiality in Religious Life," in *Bulletin on Issues of Religious Life*, 4 (1988), 1-10; E. McDONOUGH, "The Troubling Religious: Further Considerations," in *RfR*, 49 (1990), 618-625; J.W. COVILLE et al., *Assessment of Candidates for Religious Life: Basic Psychological Issues and Procedures*, Washington, DC, Centre for Applied Research in Apostolate, 1968; W.H. WOESTMAN, "Screening Persons Requesting Entrance into a Formation Program for Priesthood and Consecrated Life," in F. PEDONE and J.I. DONLON (eds.), *Roman Replies and CLSA Advisory Opinions 2004*, Washington, DC, CLSA, 2004, 107-108.

of *Renovationis causam* eventually formed part of the content of norms on formation of religious in the revised Code.²¹⁰

1.5. The process of the Revision of Canon Law on Consecrated Life.

This section discusses the immediate process of the revision of the canons on consecrated life within the framework of the revision of the 1917 Code.²¹¹ The work was entrusted to the Pontifical Commission for the Revision of the Code of Canon Law which was established by Pope John XXIII and it served as the central commission which oversaw the process.²¹² This Commission had drawn up ten general principles to guide the process of revision.²¹³

1.5.1. The Principles Governing the Revision of Canon Law on Consecrated Life

There were several subcommissions created to deal with specific parts of the Code. Among them was the subcommission for the revision of the canons on consecrated life.²¹⁴ This subcommission required some principles which would specifically guide the revision of the

²¹⁰ See c. 646 on the significance of novitiate as the formal beginning of religious life affirmed in *RC*, no. 13. The possibility of re-admission after legitimate departure without the obligation of repeating the novitiate found in *RC*, no. 38 formed the content of c. 690. The three-year minimum and nine-year maximum period stated in *RC*, no. 37 formed the content of cc. 665 and 667. The twelve-month period for validity of novitiate with interruption of not more than three months and allowance for apostolic activities during novitiate directed in *RC*, nos. 21-25 translated into cc. 648-649.

²¹¹ See *Communicationes*, 11(1979), 22-26, 296-346; 12 (1980), 130-187; 13(1981), 151-211, 325-407.

²¹² See *Communicationes*, 1 (1969), 55. See also CAPARROS, "Preface," in *CCLA*, 75.

²¹³ See *Communicationes*, 1 (1969), 55-56. See also CAPARROS, "Preface," in *CCLA*, 77-99.

²¹⁴ For further commentary on the revision of canon law for religious, see, for instance, J. BEYER, "Institutes of Perfection in the New Code," in *The Way Supplement*, 13 (1971), 93; M. SAID, "The Present State of the Reform of the Code Concerning the Section *De institutis perfectionis*," in *Studia canonica*, 8 (1974), 213-235; K.D. O'ROURKE, "The New Law for Religious: Principle, Content and Evaluation," in *CLSA Proceedings*, 36 (1974), 45-70; F.G. MORRISEY, "The Revision of the Code of Canon Law," in *Studia canonica*, 12 (1978), 177-198; B. PENNINGTON, "The Structure of the Section Concerning Religious Life in the Revised Code," in *The Jurist*, 25 (1965), 271-290; C. REGAN "The *Schema* of Canons on Institutes of Life Consecrated by Profession of the Evangelical Counsels," in *CLSA Proceedings*, 39 (1977), 98-111.

section of the Code on consecrated life. The subcommission drew up several principles which were relevant to their work from which they singled out four fundamental ones. The remaining principles, though considered less important, also had some significance in the revision of the Code.²¹⁵

The first principle called for harmony between the juridical and spiritual elements of religious life. As Paul Molinari explains, “laws only assist the action of the Spirit in giving protection,” therefore, he further states, “all innovations must be animated by spiritual renewal.”²¹⁶ Morrissey continues that consecrated life should not be some form of outward observance of rules but a life motivated by a deep inner action of the Spirit. Juridical norms are to have their foundations in the spiritual dimension of consecrated life. Morrissey therefore calls for a balance between the recognition of the action of the Holy Spirit and of fidelity to rules in drafting canons for religious law.²¹⁷

The second principle is about the fidelity to the spiritual heritage of the institute or society. As Morrissey notes, “each institute best live and perform their tasks if they do it according to their nature and character.”²¹⁸ Legislation therefore should recognize and protect the spiritual patrimony of the religious communities. In addition, J. Beyer explains that the norms are not only to encourage fidelity to the spiritual heritage of a particular institute but also to

²¹⁵ See F.G. MORRISEY, “The Spirit of the Proposed New Law for Institutes of Consecrated Life,” in *Studia canonica*, 9 (1975), 80-83; ID., “Introduction,” 15-19; SAID, “The Present State of the Reform of the Code Concerning the Section *De institutis perfectionis*,” 224; BEYER, “Institutes of Perfection in the New Code,” 92. The principles governing the revision of canons on institutes of consecrated life were approved by the Synod of Bishops in 1967. See *Communicationes*, 1 (1969), 55-56.

²¹⁶ P. MOLINARI, “*Perfectae caritatis*: The Conciliar Decree on the Renewal of Religious Life,” in *The Way Supplement*, 6 (1966), 16.

²¹⁷ MORRISEY, “Introduction,” 15.

²¹⁸ *Ibid.*, 16.

promote among the members the knowledge of this heritage.²¹⁹ The principle affirms the conciliar spirit of respect for the autonomy of each institute and a conscious effort to avoid what J.F. Hite refers to as “levelling off” of institutes in the revision process. It is also a wakeup call to each institute to rediscover its own genuine spiritual identity.²²⁰

The third principle is on subsidiarity and flexibility of norms. This principle advocates adaptation of general norms to diverse situations and needs.²²¹ According to Morrissey, the norms are to empower the institutes and their particular law to determine details of application of law “so that [...] general law [...] does not enter into endless details.”²²² James Walsh clarifies that the new law is to separate what is common from what is particular to institutes, that is, what is substantial and immutable from what is only an external formulation and can easily be modified.²²³

The fourth principle directs that norms are to foster collaborative participation of all members in the structures and activities of the institute. The leadership organs of each institute are to foster modes of representation and participation of members in the affairs of the institute.²²⁴ In the light of the spirit of *Perfectae caritatis*, the principle calls for creative initiatives of fostering representation and cooperation of the whole body of the institute.²²⁵

²¹⁹ J. WALSH, “Canon Law for Institutes of Consecrated Life: The Draft of the New Law for Institutes of Consecrated Life,” in *The Way Supplement*, 33 (1978),” 16.

²²⁰ J.F. HITE, “Commentary on Institutes of Consecrated Life and Societies of Apostolic Life (cc. 573-746),” in *CLSA Comm1*, 450.

²²¹ See *ibid.*

²²² MORRISSEY, “Introduction,” 17.

²²³ WALSH, “Canon Law for Institutes of Consecrated Life,” 17.

²²⁴ *Ibid.*

²²⁵ See MORRISSEY, “Introduction,” 19. See also BEYER, “Institutes of Perfection in the New Code,” 92.

Besides the four fundamental principles, some authors mention two other principles which, though not considered as equally important, were nevertheless relevant to the revision work.²²⁶ The first of these additional principles is the equality between male and female institutes in the application of the law except for cases where the contrary is apparent from the context of the nature of the matter. This recognition appears as a shift from the discriminatory norms included in the 1917 Code. It also demonstrated the faithfulness by the subcommission to the spirit expressed by the general principles for the revision of the entire Code and to the mind of *Lumen gentium*.²²⁷

The second principle is about respect for the dignity of all persons. In the revision process, norms should, as J.Beyers states, “promote the greatest possible respect for the dignity of the human person, his rights, personal responsibility and his normal development to enable him to achieve physical and psychological maturity.”²²⁸

The above listed principles show a great degree of faithfulness to the conciliar spirit so much desired by the subcommission and by the Holy Father at the commencement of the revision process.²²⁹ The principles advocate for ecclesiastical legislation which recognizes the divine animation as basis of laws, renewal which respects and accommodates peculiarity and

²²⁶ See BEYER, “Institutes of Perfection in the New Code,” 92. See also M. SAID, “The Present State of the Reform of the Code Concerning the Section *De institutis perfectionis*,” 224. The additional principles mentioned by Beyer are recognized by Morrissey (“The Spirit of the Proposed New Law for Institutes of Consecrated Life,” 82).

²²⁷ See BEYER, “Institutes of Perfection in the New Code,” 92. The 1917 Code had legislated some discriminatory norms with regard to women religious. See footnote no. 12. The recognition of the equality between women and men arising from the fundamental call to holiness envisioned in *LG*, no. 32 could be termed as one of the major achievements of the Council. See also R. MCDERMOTT “Women in the New Code,” in *The Way Supplement*, 50 (1984), 27-37; K. SIETMANN, “Assuring Consecrated Women’s Roles in the Church,” in *Origins*, 24 (1994-1995), 348-349; K. MEAGHER, *The Status of Women in the Post-Conciliar Church*, JCD thesis, Ottawa, Saint Paul University, 1976.

²²⁸ BEYER, “Institutes of Perfection in the New Code,” 92.

²²⁹ See CAPARROS, “Preface,” in *CCLA*, 77.

distinctiveness of institutes and the power of particular law to determine details of observance of law. The principles as a whole safeguard the fundamental elements of religious life without prejudice to the autonomy of institutes. They highlight collaboration and equality of human persons, especially of women. The principles are fairly reflected in the 1983 Code and they inform the basis of certain norms. In the context of formation, they provide a good background for the study of religious law and the rationale behind certain norms.

1.5.2. The 1977 *Schema Codicis*²³⁰

The 1977 *schema* presented the first draft of the revised religious law.²³¹ The draft was structured in three sections. The first section, with the title Preliminary Canons, contained the essential elements of consecrated life heavily influenced by *Lumen gentium*, no. 44. Section Two which was the longest, had 82 canons, grouped under the title Norms Common to All Institutes. The last section, which focused on institutes of consecration by means of public profession of the evangelical counsels, had three subsections. The first subsection treated monastic institutes, the second dealt with apostolic institutes and the last looked at the secular institutes.²³²

The draft, when brought to the members of the Commission for discussion provoked several objections. First, it was considered too radical and merely a repetition of the content of the conciliar documents. Secondly, some members of the Commission felt that the draft left too

²³⁰ PONTIFICAL COMMISSION FOR THE REVISION OF THE CODE OF CANON LAW, *Schema canonum de institutis vitae consecratae per professionem consiliorum evangelicorum*, Typis polyglottis Vaticanis, 1977, English translation *Schema of Canons on Institutes of Life Consecrated by Profession of the Evangelical Counsels: Draft*, Washington, DC, Publications Office of the United States Catholic Conference, 1977.

²³¹ See *Communicationes*, 11 (1979), 22-26, 296-346.

²³² See HITE, "Commentary on Institutes of Consecrated Life and Societies of Apostolic Life (cc. 573-746)," in *CLSA CommI*, 450. See also WALSH, "Canon Law for Institutes of Consecrated Life," 27-105; BEYER, "Institutes of Perfection in the New Code," 102; MORRISEY, "The Spirit of the Proposed New Law for Institutes of Consecrated Life," 83-90.

much room for subsidiarity and there was danger that other organs and structures within the Church would soon copy and apply the principle. Thirdly, there was objection on the danger of levelling all institutes on the typology. The objection was that the typology of the draft presented a compromise of the uniqueness and identity of the different species of institutes. Fourthly, some Commission members felt that the aspect of community life was not sufficiently dealt with. Lastly, there was a complaint that the notion of consecration presented in the draft was wrong.²³³ These objections called for the revision of the draft which resulted in the 1980 draft.

1.5.3. The 1980 *Schema Codicis*²³⁴

This *schema* was drawn in response to the objections raised in the 1977 draft. The intention of this draft was to retain what was considered positive by the Commission and to replace what had been opposed.²³⁵ The typology of 1977 was dropped. The priority of common law over particular law was given emphasis but without prejudice to the role of the latter. New sections on general chapters and on apostolates of religious were added. The new draft stressed the significance of the theological and ecclesial aspects of religious life. Another innovation was the issue of readmission of a legitimately departed member. The draft proposed that the competent major Superior with consent of council could readmit such a member and determine the appropriate probation without the member having to repeat the novitiate.²³⁶

The 1980 *Schema* demonstrated a spirit of compromise by retaining substantial content of

²³³ MORRISEY, "Introduction," 25. See also J. BEYER, "Le deuxième projet de droit pour la vie religieuse," in *Studia canonica*, 15 (1980), 12-124.

²³⁴ See E. McDONOUGH, *Ready Reference for the 1980 Schema of Canons on Institutes of Consecrated Life*, Columbus, OH, Springs Press, 1981. See also *Communicationes*, 12 (1980), 130-187.

²³⁵ See MORRISEY, "Introduction," 26.

²³⁶ See *ibid.*

the 1977 draft and, at the same time, inserting innovations in the revised draft. However, with all the hard work of the members of the Commission on the 1980 draft, after a thorough study of it, it was once more subjected to some changes which resulted in the 1982 draft.²³⁷

1.5.4. The 1982 *Schema Codicis*

This *Schema* retained most of what had been proposed in the 1980 draft, with only two major innovations. The first new addition was on personal patrimony of religious. The earlier drafts had proposed incapacity to acquire subsequent property by a religious who had renounced ownership of personal property. The 1982 draft clarified that this only applied to members of institutes whose nature required renunciation of personal property by members.²³⁸ The second innovation was on the canonical status of a member who became insane during temporary vows. According to the new draft, such a member could not be dismissed even if they were incapable of making further professions.²³⁹ These two innovations translated into laws in the revised 1983 Code as canons 668 § 3 and 689, respectively.²⁴⁰ Besides the two additions, the judicial procedure for dismissal of members was also revised. The right to recourse to competent higher authority within ten days of notification was added and this later became canon 700 of the 1983 Code. In cases of mandatory dismissal for delicts related to violation of the sixth commandment of the Decalogue, the competent superiors were empowered to apply pastoral measures and only employ dismissal as the last resort. The superior needed not to proceed with the dismissal if such member reformed. This addition was imported to the revised Code as canon 695.

²³⁷ See *ibid.*

²³⁸ See *ibid.*

²³⁹ See *Communicationes*, 13 (1981), 331-336.

²⁴⁰ See MORRISEY, "Introduction," 26.

In conclusion, the three drafts manifested the great spirit of dedication and commitment of the subcommission to their work. Faithful to the conciliar spirit, in a progressive manner, the subcommission studied, analyzed, and brought in new discoveries to their work to bring forth norms which presented a clear and a refined description of consecrated life.²⁴¹

Conclusion

Situating formation in the context of consecrated life, the chapter has traced the evolution of thought by the Church on formation of the lay religious from the period of the 1917 Code and the Second Vatican Council up to the time of the revision of the Code. The progression on the Church's understanding of religious life itself, together with some of its aspects such as formation, has passed through a long history. Formation of lay religious in the 1917 Code legislation was limited to the novitiate. Formal formation after first profession was prescribed for clerical religious only. This notion however changed towards the time of Vatican II and finally, the Council transformed the understanding of religious life and its place and role in the Church with the promulgation of its documents specifically issued for the renewal of religious life in all its aspects, including formation. Further changes took place during the revision of the Code which saw the legislation on formation after temporary profession (cc. 659-661). The present Code regards lifelong formation as an intrinsic aspect of religious life. It therefore obliges all religious institutes to accord formation to their members not only after novitiate but throughout their lives.

²⁴¹ For the chronology of the drafts for the revision of religious law, see *Communicationes*, 1 (1969), 77-100; 2 (1970), 170-173; 5 (1973), 47-69; 5(1974), 72-93; 7 (1975), 63-92; 9 (1977), 52-61; 10 (1978), 160-179; 11 (1979), 22-66, 296-346; 12 (1980), 130-187; 13 (1981), 151-211, 305-407.

CHAPTER TWO: FORMATION DURING THE PERIOD OF TEMPORARY VOWS

ACCORDING TO THE 1983 CODE AND THE SUBSEQUENT DOCUMENTS

Introduction

Post-novitiate formation for lay religious received new impetus after Vatican II through the instruction *Renovationis causam*, where the necessity and exigency of this formation is recognized and emphasized. The post-novitiate formation acquired its juridical determination in the 1983 Code, in canons 659-661. The Code distinguishes two aspects of post-novitiate formation: formation during temporary vows and ongoing formation which continues throughout the life of a religious. The respective norms have their roots in the Vatican II teachings found in the conciliar documents on the training of candidates for sacred orders. An understanding of the norms on formation of religious therefore is best achieved by studying them alongside the conciliar documents which form the basis of their sources¹ and the post-conciliar documents which have broadened and updated their content.²

This chapter discusses the juridical principles on formation during the period of temporary vows as presented in the 1983 Code and subsequent magisterial documents. The first section presents the formulation and development of the canons on religious formation (cc. 659-

¹ See CONGREGATION FOR CATHOLIC EDUCATION, *Ratio fundamentalis institutionis sacerdotalis*, January 6, 1970, in *AAS*, 62 (1970) 321-384, English translation in *The Pope Speaks*, 15 (1970), 264-314; CONGREGATION FOR RELIGIOUS, Instruction on Careful Selection and Training of Candidates for the State of Perfection and Sacred Orders *Religiosorum institutio*, February 2, 1961, in *CLD*, vol. 5, 452-486. See also *PC*, no. 18, in *AAS*, 58 (1966), 710, in *FLANNERY I*, 621; *CD*, no. 16, in *AAS*, 58 (1966), 680, in *FLANNERY I*, 572; *ES II*, no. 19, in *AAS*, 58 (1966), 778, in *FLANNERY I*, 628; *PO*, no. 19, in *AAS*, 58 (1966), 1019, in *FLANNERY I*, 897; *OT*, no. 22, in *AAS*, 58 (1966), 726, in *FLANNERY I*, 723-724.

² See *RC*, dedicated particularly to formation of religious; *PI*, a follow up of *RC*; *VC*, nos. 63-71, in *AAS*, 88 (1996), 437-447, in *L'Osservatore Romano*, English ed., April 3, 1996, supplement, 12-13; CONGREGATION FOR INSTITUTES OF CONSECRATED LIFE AND SOCIETIES OF APOSTOLIC LIFE, Instruction on Inter-Institute Collaboration for Formation *Attenta alla condizioni*, December 8, 1998, in *Enchiridion Vaticanum*, vol. 17, 1339-1373, in *CLD*, vol. 14, 591-623.

661) and offers an analysis of their content in order to gain a deeper understanding of the teachings and the discipline of the Church regarding the formation of religious. The second part treats the other universal norms on formation during the period of temporary vows which regulate the duration, the tasks of those charged with formation, the rights and obligations of those in temporary vows and the manner in which this formation is concluded. The last section of the chapter considers the magisterial documents issued after the promulgation of the Code to gain insight into the progression of thought in the Church regarding formation of religious in the light of the emerging realities and challenges facing religious life in general, and formation in particular.

2.1. The Norms on Formation during the Period of Temporary Vows in the 1983 Code of Canon Law

This section attempts to expose the deeper meaning of the norms on formation during temporary vows by tracing the roots of these norms, their formulation during the revision of the Code and their final form in the 1983 Code. These norms are then analyzed using the canonical rule of understanding ecclesiastical laws as provided in canon 17.³

2.1.1. Formulation of Canon 659 on Formation of Members of Religious Institutes

This subsection reviews the evolution of canon 659, that is, the exposition of its roots,

³ Merely ecclesiastical laws are human positive laws enacted by the ecclesiastical legislator. They are to be understood as c. 17 states: “in accord with their proper meaning of the words in their text and context.” For more about understanding ecclesiastical laws, one can refer to some recent monographs on c. 17: P.J. BROWN, *Canon 17 CIC 1983 and the Hermeneutical Principles of Bernard Lonergan*, Rome, Editrice Pontificia Università Gregoriana, 1999; C. D’SOUZA, *Approach to the Interpretation of the 1983 Code according to Canon 17 and the Literary Critical Theory*, Rome, Pontificia Universitas Urbaniana, 1994; W. KOWAL, *Understanding Canon 17 of the 1983 Code of Canon Law in Light of Contemporary Hermeneutics*, Lewiston, NY, The Edwin Mellen Press, 2000; P. SANTOSO, *The Rules of Interpretation according to Canon 17: Searching the Will of the Legislator inside the Words of Law*, Rome, Pontificia Studiorum Universitas a S. Thoma Aquinate in Urbe, 1986.

and of the process of its development into its present form in the course of the revision of the Code, and the analysis of the canon's wording; these are essential for gaining a deeper understanding of both its letter and spirit.

2.1.1.1. Sources of Canon 659 § 1 and § 2

Canon 659 § 1 has its sources in the General Statutes on the Religious, Clerical, and Apostolic Training to Be Imparted to Clerics in the States of Perfection to Be Acquired, no. 8 § 2, Decree on the Ministry and Life of Priests *Presbyterorum ordinis*, no. 19, Document on Basic Scheme for Priestly Training *Ratio fundamentalis institutionis sacerdotalis*, no. 100,⁴ Decree on Norms for Implementing the Decree on the Adaptation and Renewal of Religious Life *Ecclesiae Sanctae*, II, no. 3, Instruction on the Renewal and Adaptation of Formation for Living the Religious Life *Renovationis causam*, nos. 4 and 10, and Decree on the Training of Priests *Optatam totius*, no. 22. *Statuta generalia*, no. 8 § 2 stresses continued formation for clerical religious during the period between definitive incorporation and the reception of orders.⁵ *Presbyterorum ordinis*, no. 19 emphasizes continuous formation of priests for spiritual vitality, apostolic effectiveness and solid foundation in their knowledge of the Magisterium and Sacred

⁴ A revised version of this document was published by the Congregation for Catholic Education on March 19, 1985 in the view of the new Code (CONGREGATION FOR CATHOLIC EDUCATION, *Ratio fundamentalis institutionis sacerdotalis*, March 19, 1985, English translation in *Norms for Priestly Formation*, vol. 1, Washington, DC, National Conference of Catholic Bishops, 1993, 15-60). The 1983 Code of Canon Law recognized three dimensions: academic, pastoral, and spiritual in priestly formation. A subsequent document, the Post - synodal Apostolic Exhortation on the Formation of Priests in the Circumstances of the Present Day *Pastores Dabo Vobis* by John Paul II introduced a fourth dimension: human dimension (JOHN PAULL II, Post-synodal Apostolic Exhortation on the Formation of Priests in the Circumstances of the Present Day *Pastores dabo vobis*, March 25, 1992, no. 72 in *AAS*, 84 [1992], 783-787), in *Origins*, 21 (1991-1992), 752-753.

⁵ CONGREGATION FOR RELIGIOUS AND FOR SECULAR INSTITUTES, General Statutes on the Religious, Clerical, and Apostolic Training to Be Imparted to Clerics in the States of Perfection to Be Acquired, July 7, 1956 (= *Statuta generalia*), no. 8 § 2, English translation *The Apostolic Constitution Sedes Sapientiae and the General Statutes Annexed to It, on the Religious, Clerical, and Apostolic Training to Be Imparted to Clerics in the States of Perfection to Be Acquired*, Washington, DC, Catholic University of America, 1957, 23.

Scriptures.⁶ *Ratio fundamentalis institutionis sacerdotalis*, no. 100 points to lifelong training of priests in spiritual, doctrinal and above all, pastoral fields, with specific emphasis on the first year after ordination, for ministerial and pastoral effectiveness.⁷ *Ecclesiae Sanctae, II*, no. 33 emphasizes formation which is experiential and which safeguards the special character of the individual institute.⁸ *Renovationis causam*, no. 4 recommends a gradual and extended period of formation from the time of the novitiate and the years following first temporary commitment.⁹ *Renovationis causam*, no. 10 recognizes the time of temporary vows as a probationary period.¹⁰ *Optatam totius*, no. 22 recommends the continuation of perfection of priestly training in the period after the seminary for ministerial appropriateness and apostolic effectiveness.¹¹

Canon 659 § 2 has its source in: Decree on the Up-to-date Renewal of Religious Life *Perfectae caritatis*, no. 18, *Ratio fundamentalis institutionis sacerdotalis*, no. 101, *Ecclesiae Sanctae, II*, no. 38. *Ratio fundamentalis institutionis sacerdotalis*, no. 101 outlines a scheme recommended to Episcopal conferences for the post-seminary training of priests.¹² This scheme is to include the renewal and updating of pastoral and doctrinal aspects of priestly ministry. In addition, the structure of the scheme is to be such that studies and pastoral ministry are coordinated and harmonized. *Perfectae caritatis*, no. 18 links effective solid adaptation and renewal of religious life to post-novitiate formation. This formation is to be given according to

⁶ *PO*, no. 19, in *AAS*, 58 (1966), 1019-1020, in *FLANNERY I*, 897-898.

⁷ *RFIS*, no. 100, in *AAS*, 62 (1970), 382-383, in *The Pope Speaks*, 15 (1970), 313.

⁸ *ES II*, no. 33, in *AAS*, 58 (1966), 781, in *FLANNERY I*, 631.

⁹ *RC*, no. 4, in *AAS*, 61 (1969), 107-108, in *FLANNERY I*, 639-640.

¹⁰ *RC*, no. 10, in *AAS*, 61 (1969), 112, in *FLANNERY I*, 645.

¹¹ *OP*, no. 22, in *AAS*, 58 (1966), 726-727, in *FLANNERY I*, 723-724.

¹² *RFIS*, no. 101, in *AAS*, 62 (1970), 383-384, in *The Pope Speaks*, 15 (1970), 314.

the capacity of the candidate, mindful of the present times and circumstances of today's society.¹³ *Ecclesiae Sanctae*, II, no. 38 mandates each institute, after adequate experimentation with the directives of *Renovationis causam*, to draw up its own norms on formation.¹⁴

The sources of canon 659 § 1 and § 2 recognize the significance of the post-seminary or post-novitiate formation as a means of perfecting the formation already begun in the seminary for priests or the novitiate for temporarily professed. This formation is to be gradual, adapted to the capacity of the candidate, solid, harmonized and configured to the special character of individual institutes. Each institute or Episcopal conference is to draw up its programme for this formation.

2.1.1.2. Development of Canon 659 § 1 and § 2 in the Drafting Process

The text of the first draft, that of canon 64 of the *Schema canonum de institutis vitae consecratae* of 1977, reads as follows:

§ 1. In singulis Institutis iure proprio definiatur institutionis ratio et duratio quae post primam professionem sodalibus tradenda est.

§ 2. Perdurante tempore huius institutionis sodalibus officia et opera ne committantur quae eam impediunt.¹⁵

The text of the canon underwent some changes in the subsequent *schemas*. In the 1980 draft, printed as canon 585, the word *cooptatio* in § 1 was replaced with *professio*, as the 1980 *Schema* had rejected the option of consecration by means of other bonds as proposed by

¹³ *PC*, no. 18, in *AAS*, 58 (1966), 710, in *FLANNERY I*, 621.

¹⁴ *ES II*, no. 38, in *AAS*, 58 (1966), 781, in *FLANNERY I*, 632.

¹⁵ *Communicationes*, 13 (1981), 175: “§ 1. In individual Institutes the programme and duration of formation which should be given to its members after first profession must be defined by its proper law. § 2. During the time of this formation, offices and tasks which may impede it are not to be entrusted to the members.”

Renovationis causam.¹⁶

Paragraph two also had some changes in the 1980 draft. The word *constitutiones* was replaced with *ius proprium*. This was pursuant to c. 90 of the 1977 *Schema* which recognized that the term “constitutions” does not encompass all the internal legislation of religious institutes, therefore, a broader title, “proper law,” was more appropriate.

The Secretary of the subcommission remarked that the *Schema* placed more emphasis on “the programme of formation,” which had already been treated in the draft on the People of God under the section of “Formation of Clerics” and which had overlooked the necessity of formation of religious. In response to the above observation by the Secretary, the word, *huiusmodi* was replaced with *huius* and the words *durationem et* switched position with *eiusdemque durationis*, to stress that the *Schema* specifically focused on the programme of post-novitiate formation of lay religious and its duration and not formation in general, as was presented in the earlier draft. Paragraph three was moved to canon 586 of the 1980 *Schema*.¹⁷

One consultor pointed out to the committee that paragraphs 1 and 2 of the canon had treated the formation of religious in general while the third paragraph was specifically concerned with religious “who are preparing to receive holy orders.” Another consultor insisted on the necessity and importance of a period of formation after first profession, before the person is directly initiated into apostolic work. However, the secretary preferred canon 64 of the 1977 *Schema* and the others were in agreement with him. They decided that the following amended text be accepted:

§ 1. In singulis Institutis, post primam professionem omnium sodalium institutio perficiatur ad

¹⁶ *RC*, no. 34, in *AAS*, 61 (1969), 118, in *FLANNERY I*, 653.

¹⁷ See Appendix, 271.

vitam Instituti propriam plenius ducendam et ad eius missionem aptius proseguendam.

§ 2. Quapropter ius proprium rationem definire debet huius institutionis eiusdemque durationis, attentis Ecclesiae necessitatibus atque hominum temporumque conditionibus prout a fine et indole Instituti exigitur.¹⁸

The text had no further changes in the subsequent *Schemas* up to its promulgation in the 1983 Code.¹⁹

The text promulgated as canon 659 § 1 and § 2 in the 1983 Code reads as follows:

§ 1. In singulis institutis, post primam professionem omnium sodalium institutio perficiatur ad vitam instituti propriam plenius ducendam et ad eius missionem aptius proseguendam.

§ 2. Quapropter ius proprium rationem definire debet huius institutionis eiusdemque durationis, attentis Ecclesiae necessitatibus atque hominum temporumque condicionibus, prout a fine et indole instituti exigitur.²⁰

2.1.1.3. Analysis of Canon 659 § 1 and § 2

In its first part, c. 659 § 1 reads:

“In individual institutes the formation of all the members is to be continued after first profession so that they lead the proper life of the institute more fully and carry out its mission more suitably.”

The canon directs that after first profession, formation of members is to be perfected for the purpose of the overall end of formation of every institute, which is living its life fully, and

¹⁸ *Communicationes*, 13 (1981), 175-1761: “§ 1. In individual institutes the formation of all members is to be continued after first profession so that they lead the proper life of the institute more fully and carry out its mission more suitably. § 2. Therefore, proper law must define the programme of this formation and its duration, attentive to the needs of the Church and the conditions of people and times, insofar as the purpose and character of the institute require it.”

¹⁹ For a detailed presentation of the process of the formulation and development of canon 659 to its final version, see Appendix, 271.

²⁰ “§ 1. In individual institutes, the formation of all the members is to be continued after first profession so that they lead the proper life of the institute more fully and carry out its mission more suitably. § 2. Therefore, the constitutions must define the program of this formation and its duration, attentive to the needs of the Church and the conditions of people and times, insofar as the purpose and character of the institute require it.”

responding to its mission effectively. The canon recognizes the inadequacy of novitiate formation to prepare a member for permanent commitment and the need for continuity and constancy of formation as a lifelong project aimed at the integration of life. Repeating the conciliar intention, the text reaffirms formation of religious as an intrinsic aspect of religious life and a lifelong process which involves gradual and progressive growth towards maturity.²¹

The phrase, “in individual institutes,” implies that formation is a right and obligation of all members and in all institutes whether apostolic or contemplative in nature. As this is a question of a right, the responsibility of all members toward formation is indicated: besides superiors and formators who are directly involved in formation work, every member of the religious family has a duty towards contributing to the formation of younger members, at the community and personal level, by the witness of their lives,²² by prayer or by willingness to give input on areas of formation in which they have appropriate skills.²³

The phrase, “in individual institutes” also implies that the formation during the period of temporary vows is to be configured to the character and purpose of each institute. The Instruction on Inter-Institute Collaboration for Formation further clarifies that in the event of inter-institute collaboration on formation initiatives, input from such ventures is to be harmonized with the ends of the institute and that the duty and responsibility of each individual institute to form its

²¹ See SMITH, “Commentary on Formation of Religious (cc. 659-661),” 826.

²² Joan Faber remarks: “[...] formation is mutual, individual and collective. All members of a religious institute are to engage in the formation of genuine, apostolic communities and individuals. The obedient community involved in a corporate search and response to the Spirit can give hope to all, and strength to the individual member” (J. FABER, “Formation and Commitment in the New Code,” in *The Way Supplement*, 50 [1984], 41).

²³ See c. 652 § 4, which is reaffirmed in *PI*, no. 53, in *AAS*, 82 (1990), 505, in *Origins*, 19 (1989-1990), 690.

members is not to be compromised or substituted with such initiatives.²⁴

Canon 659 § 1 continues: “[...] so that they lead the proper life of the institute more fully and carry out its mission more suitably. [...]” According to the wording of the canon, the quality of religious life and the effectiveness of the mission in the Church of individual religious institutes depend on the ongoing formation of members. The text connects the purpose of post-novitiate formation to the ends of the institute, that is, its life and its mission according to its purpose and character. The canon recognizes that novitiate formation does not provide the maturity required for permanent commitment in religious life. The nature of formation during the period of temporary vows is to deepen what has been built during the novitiate.²⁵

Post-novitiate formation, besides deepening the understanding of the obligations of religious life specified in canon 654, is to orientate the candidate to a more profound knowledge of the patrimony of the institute as described in canon 578, the charism (c. 577) and the constitutions (c. 587). The text uses the adjective “more” to emphasize the quality of the life and of the mission of the individual institute. The stress is on the fuller and deeper realization of integration of religious life of the individual member which is to be the outcome of this formation. Aspects of the life of the institute like renewal, evaluation of the life of the institute, challenges and new strategies, are therefore to be included in the structure of this formation. This is to ensure that the candidates are well orientated into the life and mission of the institute before

²⁴ See CONGREGATION FOR INSTITUTES OF CONSECRATED LIFE AND SOCIETIES OF APOSTOLIC LIFE, Instruction on Inter-Institute Collaboration for Formation *Attenta alla condizioni*, no. 13, December 8, 1998, in *Enchiridion Vaticanum*, vol. 17, 1352, in *CLD*, vol. 14, 603.

²⁵ See ANDRÉS, “Commentary on Religious Institutes (cc. 607-709),” 1752. See also M.E. PENET, “Why a Juniorate?” in *Sisters Formation Bulletin*, vol. 7, no. 1 (1960), 4. For extensive reading on post-novitiate formation, see R. BRADLEY (ed.), *The Juniorate in Sister Formation: Proceedings for the Sister Formation Conference for 1957-1958*, New York, Fordham University Press, 1960; S.E. SANTOS, “The *Ratio formationis*: Expression and Exigency of the Identity of a Religious Institute,” in *Consecrated Life*, vol. 16, no. 2 (1991), 133-147; B. PENNINGTON, “The Temporary Profession of Monks - A Proposal,” in *The Jurist*, 27 (1967), 82-84; G.R. MURPHY, “Candidates and Community: Mutual Formation,” in *The Way Supplement*, 62 (1988), 25-32; E. KINERK, “Formation for Vows,” in *The Way Supplement*, 71 (1991), 64-72.

they come to the decision to make a permanent commitment in it.

Canon 659 § 2 reads:

“Therefore, proper law must define the program of this formation and its duration, attentive to the needs of the Church and the conditions of people and times, insofar as the purpose and character of the institute require it.”

The canon directs institutes to draw up their own formation programme. The text reflects the spirit of subsidiarity and the recognition of the autonomy of individual institutes envisioned in the conciliar teachings. If those being formed are to “lead life proper to the institute more fully and fulfill its mission more effectively,”²⁶ it is only fitting that they be trained by means of a well-structured and definite programme. The programme is to spell out the format, scope and duration of formation during temporary vows according to its proper law in view of the goals projected. In drawing up norms for the programme, J. Hite explains that the substantial parts and general principles which are not easily modified, can be put in the fundamental law and those aspects which can be revised easily to be in directories or policies.²⁷

The following part of c. 659 § 2 states: “attentive to the needs of the Church and the conditions of people and times, insofar as the purpose and character of the institute require it.” The wording of the text reinforces the apostolic and the spiritual nature of this formation. It is to orientate the candidate to the mission of the institute performed in the ecclesial context and to achieve unity of life orientated toward the necessary maturity for permanent commitment. It should therefore, as E. Gambari explains, be concrete, that is, prepare religious to live and act in definite circumstances, place and time.²⁸ He adds that the formation programme is to be specific

²⁶ Canon 659 § 1.

²⁷ See HITE, “Admission of Candidates,” 162. See also GAMBARI, *The Religious Adult in Christ*, 262.

²⁸ See GAMBARI, *The Religious Adult in Christ*, 266.

in its content and aims which are to correspond to the proper character and nature of the institute.²⁹ The canon envisions formation which is characterized by ecclesial awareness and apostolic preparedness, mindful of the cultural realities of the candidate, the emerging realities in religious life and the changes in the world.³⁰

2.1.2. Formulation of Canon 660 on the Pedagogy of Formation

The formulation of canon 660 reflects its development and the changes it underwent after its first appearance in 1977 draft, its modifications in the subsequent *Schemas* of 1980 and 1982 and its final form in the 1983 Code.

2.1.2.1. Sources of Canon 660

Canon 660 § 1 has its sources in: Pius XII's apostolic letter *Sedes sapientiae*, nos. 3 and 4, *Perfectae caritatis*, no. 18, *Ratio fundamentalis institutionis sacerdotalis*, no. 3 and *Mutuae relationes*, nos. 31-32. Pius XII's apostolic letter *Sedes sapientiae*, in nos. 3 and 4 treats the content and characteristics of the training of priests in the post seminary period. *Perfectae caritatis*, no. 18 recommends formation which harmoniously blends all its components towards integration of religious life. It also recognizes the academic value of such training if opportunity offers. *Ratio fundamentalis institutionis sacerdotalis*, no. 3 explains that the purpose of priestly formation is to affirm the divine revelation and the magisterial teaching on common and ministerial priesthood. This formation is also to foster brotherly collaboration among priests and a positive relationship with their bishop marked with trust and generosity. *Mutuae relationes*,

²⁹ See *ibid.*

³⁰ See SCHNEIDERS, *Selling All*, 37.

nos. 31-32 recommends collaborative initiatives in formation and training by means of establishing centres of higher learning which have well-structured pastoral plans and whose goals are periodically assessed.

The sources of canon 660 § 1 highlight the objectives and means of post-seminary and post-novitiate formation. Such formation which may be undertaken through collaborative endeavours, is to lead to the integration of all aspects of the life of the one being formed.

Canon 660 § 2 has its sources in: *CIC/17*, c. 598, *Statuta generalia*, no. 26 § 2 and no. 40 § 6-7, *Religiosorum institutio*, no. 49 and *Perfectae caritatis*, no. 18. *Statuta generalia* and *CIC/17*, c. 598, in highlighting the significance of continued formation of clerical religious, cautions against assigning clerical religious duties which impede their formation (no. 26 § 2; *CIC/17*, c. 598 § 2). *Statuta generalia* go on to specify some activities which may interfere with formation, as imprudent and unlimited reading of profane literature, listening to the radio and heavy ministerial duties (no. 40 § 6). They therefore recommend that the internal authority is to ensure that norms which exempt clerical religious undertaking studies as well as their teachers from some duties in the community which may overburden them are clearly specified in the proper law. In case of necessity, superiors, including local ones, can grant dispensation from such duties (no. 40 § 7).

In stressing the need for solid foundation of priestly life, the instruction *Religiosorum institutio*, no. 49 and *CIC/17*, c. 598 § 1 recommend gradual insertion into apostolic ministry and continuation of doctrinal, spiritual, and philosophical training. This training is to be under the guidance of reputable and experienced senior priests and spiritual directors. The priority of this training over apostolic ministry for young priests is emphasized. *Perfectae caritatis*, no. 18, echoing the same message, stresses continued formation after the novitiate and discourages

apostolic assignment to religious immediately after the novitiate.

The sources stress the gravity of the requirement of continued formation for newly ordained priests and religious immediately after their first profession to the extent that any apostolic work which may impede it is forbidden. Particular or proper law is to specify such tasks or offices which may jeopardize this formation.

2.1.2.2. Development of Canon 660³¹

The text, which corresponds to that of canon 65 of the *1977 Schema*, is as follows:

§ 1. Institutio sub ductu peritorum consequenda atque capacitati sodalium accommodata, sit, doctrinalis simul ac practica iuxta exigentias instituti titulis etiam congruentibus pro opportunitate obtentis.³²

The text of canon 65 of the *1977 Schema* underwent some modifications in the 1980 draft. The words *sub ductu peritorum consequenda atque* were omitted in the *1980 Schema* on the basis of a suggestion by one consultor that a norm which instructs that on-going formation is to be carried out “under the guidance of experts” be added to the *Schema*. Only one consultor was in favour of the possibility.

The words *sit systematica* and *spiritualis et apostolica* were added to emphasize the unified nature of this formation, that is, integration of its spiritual and apostolic aspects. The words *iuxta exigentias instituti* were omitted as this formation did not prepare members

³¹ See *Communicationes*, 13 (1981), 175-176.

³² PONTIFICIA COMMISSIO CODICI IURIS CANONICI RECOGNOSCENDO, *Schema canonum de institutis vitae consecratae per professionem consiliorum evangelicorum*, Typis polyglottis Vaticanis, 1977, English translation *Schema of Canons on Institutes of Life Consecrated by Profession of the Evangelical Counsels: Draft*, Washington, DC, Publications Office of the United States Catholic Conference, 1977, 38-39: “This training is to be pursued under the direction of experts and accommodated to the capacity of members, should be at one and the same time theoretical and practical in accord with the demands of the institute; further, appropriate certificates are to be obtained as the times may dictate.”

exclusively for the needs of an individual institute but for the mission of the Church. The words *tam ecclesiasticis quam civilibus* were added as recognition by the subcommission of the academic value such training may possess and to point out that it could be obtained in either ecclesiastical or state institutions.

The Secretary proposed, and the majority accepted, that this text would constitute paragraph one of the canon and that paragraph two of canon 65 of the 1977 draft would become paragraph two of the previous canon (c. 64):

Perdurante tempore huius institutionis, sodalibus officia et opera ne committantur, quae eam impediunt.³³

The text was accepted with the addition of the terms: “(...capacitati sodalium) accommodata spiritualis et apostolica, doctrinalis ...”³⁴

The draft was, therefore, modified as:

§ 1. Institutio sit systematica, capacitati sodalium accommodata, spiritualis et apostolica, doctrinalis simul ac practica, titulis etiam congruentibus, tam ecclesiasticis quam civilibus, pro opportunitate obtentis.

§ 2. Perdurante tempore huius institutionis, sodalibus officia et opera ne committantur, quae eam impediunt.³⁵

The text underwent a slight modification only in paragraph one in the 1982 draft with the word *capacitati* being replaced with *captui*. The text of canon 586 of the 1982 draft thus reads:

§ 1. Institutio sit systematica, captui sodalium accommodata, spiritualis et apostolica, doctrinalis

³³ *Communicationes*, 13 (1981), 176: “During the period of formation, members are not to be given offices and undertakings which hinder their formation.”

³⁴ “[...] adapted to (the capacity of the members), both spiritual and apostolic, doctrinal [...]” (ibid.).

³⁵ “§ 1. Formation is to be systematic, adapted to the capability of the members, spiritual and apostolic, doctrinal and at the same time practical. Suitable degrees, both ecclesiastical and civil, are also to be obtained when appropriate. § 2. During the time of this formation, offices and tasks which may impede it are not to be entrusted to the members” (ibid.).

simul ac practica, titulis etiam congruentibus, tam ecclesiasticis quam civilibus, pro opportunitate obtentis.

§ 2. Perdurante tempore huius institutionis, sodalibus officia et opera ne committantur, quae eam impediunt.³⁶

The text had no further changes and was promulgated thus in the 1983 Code as canon 660.³⁷

2.1.2.3. Analysis of Canon 660

Canon 660 § 1 reads:

“Formation is to be systematic adapted to the capacity of the members, spiritual and apostolic, doctrinal and at the same time practical. Suitable degrees, both ecclesiastical and civil, are also to be obtained when appropriate.”

The wording of the canon here gives the directives on the pedagogical organization of post-novitiate formation. This has to do with the format, scope, and duration of the formation coupled with the availability of favourable conditions for growth of the candidate such as presence of a formative community and competent directors and teachers.³⁸

The expression “adapted to capacity of members” implies formation which is focused on the candidate. According to Andrés, it does not refer to adapting to the capacity of the character

³⁶ PONTIFICIA COMMISSIO CODICIS IURIS CANONICI RECOGNOSCENDO, *Codex iuris canonici: schema novissimum iuxta placita Patrum Commissionis emendatum atque Summo Pontifici praesentatum*, Typis polyglottis Vaticanis, 1982, 123: “§ 1. Formation is to be systematic, adapted to the capacity of the members, spiritual and apostolic, doctrinal and at the same time practical. Suitable degrees, both ecclesiastical and civil, are also to be obtained when appropriate. § 2. During the time of this formation, offices and tasks which may impede it are not to be entrusted to the members.”

³⁷ For the presentation of the process of the drafting of canon 660 to its final version, see Appendix, 272.

³⁸ See *PI*, no. 60, in *AAS*, 82 (1990), 508, in *Origins*, 19 (1989-1990), 691. Andrés explains that for the formation process to achieve its ends, the pedagogy of the entire process is to be structured in a way that the programme is planned positively with efficacious initiatives and specific periodic evaluation of its achievements. It is to be harmonized, introduced gradually and carried out in a conducive environment and by teachers and formators, well chosen for their competence and experience. See ANDRÉS, “Commentary on Religious Institutes (cc. 607-709),” 1756.

and nature of the institute but to that of the individual, according to his or her character, intellectual endowment and sensitivity.³⁹ This recalls the directive of *Renovationis causam*, no. 7 which emphasizes the maturity of the candidate as the basis of qualification for admission into religious life.⁴⁰ Formation is to be individualized, taking into account the age and the progressive development of the individual's personality. Jeanne D'Arc notes that formators are to be mindful of the gifts and talents of the individual and capitalize on them. This will ensure that the goals of formation are best realized and any harm to the member, especially through intellectual training for which he or she lacks the aptitude, is avoided.⁴¹ Sandra Schneiders adds that different candidates may require different emphasis on specific aspects of formation; for instance, one candidate may have excellent professional maturity but totally lack maturity in spiritual and doctrinal aspects.⁴² Schneiders recommends that the process of formation pay attention to the family, cultural and social background of the candidate in view of the realities of the present human society, characterized by permissiveness, violence, consumerism, lack of moral formation, broken families, to all of which the candidate might have been exposed.⁴³

Building on c. 652, the text specifies the areas of formation in both content and

³⁹ ANDRÉS, "Commentary on Religious Institutes (cc. 607-709)," 1756. Sandra Schneiders adds that this formation is to take into account the age, experience, faith background of the candidate in order to avoid leveling off of candidates. See SCHNEIDERS, *Selling All*, 38.

⁴⁰ 'Maturity' especially, is an elusive concept. It is a quality which develops throughout the course of a lifetime, and is the result of a personal response to a wide variety of experiences. It certainly does not come from an academic study of books on the characteristics of the mature person, and no instructor or system of instruction is going to 'infuse' maturity. See J. HARRIOT, "A Note on Formation Personnel," in *The Way Supplement*, 8 (1969), 243. The author goes on to explain that, every order and congregation is ideally looking for an individual who is human, who is masculine or feminine, who is Christian and who, as such, is willing to adopt the life-style of this or that congregation. See *ibid.*, 244.

⁴¹ See J. D'ARC, *Witness and Consecration*, London, Chapman, 1966, 130.

⁴² See SCHNEIDERS, *Selling All*, 55.

⁴³ See *ibid.*

characteristics. The phrase “at the same time” implies integration and harmonization of both the content and methodology of the specified aspects of formation. While all the components are to be imparted individually, the process is to be orientated in such a manner that there is coordination and integration amongst them, as each aspect needs the others for achieving the aim of formation. Jeanne D’Arc explains that the apostolic life of religious requires a spiritual and solid doctrinal basis for eschatological witness. She continues to point out that since there are apostolates to be performed, practical formation cannot be omitted.⁴⁴ Elio Gambari concurs that doctrinal formation, carried out profoundly, nourishes the spiritual life which communicates, defends and explains it in ministry.⁴⁵

Such harmony and integration is to ensure that the apostolic dimension of an institute according to its nature and character is imbued with its spirituality. It also ensures that the doctrinal formation which orientates the candidate to a deeper understanding and appreciation of the Magisterium, Tradition, Sacred Scriptures and theological understanding of consecrated life, are all fused together in a practical sense. This is to help the candidate acquire a deeper ecclesial mind, sensitive to the needs of the Church and docility to the Spirit, motivated by apostolic zeal to carry out the mission of the institute and to live its life more fully.⁴⁶

Sandra Schneiders however admits that the process of harmonizing all the aspects of formation in a given timeline ordered for assessment and suitability for final commitment can be burdensome. This is because formation continues alongside studies, community life, apostolic ministry and day to day living of all the obligations of religious life. This can be overwhelming

⁴⁴ See D’ARC, *Witness and Consecration*, 114.

⁴⁵ See GAMBARI, *The Religious Adult in Christ*, 71.

⁴⁶ See SCHNEIDERS, *Selling All*, 58.

for the candidate even with the most well planned structure.⁴⁷ D'Arc adds that the kind of studies required for the various components of this formation usually take too much of the total probationary period, making it difficult for candidates to maintain proper synthesis of the components required for achieving the necessary maturity required for perpetual commitment.⁴⁸ Those responsible for formation have to be conscious of the above and design structures which focus more on integration than on the quantity of input.

The canon recognizes the academic value of formation and the possibility of it being offered in institutions outside the institute. The justification of the academic value of formation is based on the relevance, aptitude, and professionalism which are to characterize the apostolic endeavours of individual religious and also a demand of justice to those being served. Post-novitiate formation which includes apostolic formation, aims at empowering the candidate to fulfill the apostolic mission of the institute. Such apostolic activities are usually in the form of a specific profession (in the sense of occupation) for which one qualifies after acquiring the necessary skills and competence.⁴⁹ The specific professions, besides the religious and their institutes, also benefit the Church and society. Religious, therefore, like any other professionals, have to meet the ordinary standards laid down by laws of a given nation.⁵⁰ Sandra Schneiders adds that the possibility of obtaining academic qualifications is also a means of enhancing diligence and seriousness on the part of the religious and of ensuring professional security and all

⁴⁷ See *ibid.*, 68.

⁴⁸ See D'ARC, *Witness and Consecration*, 121.

⁴⁹ See GAMBARI, *The Religious Adult in Christ*, 150.

⁵⁰ Sandra Schneiders explains that professional qualification is an obligation of justice. Since in most countries, it is a requirement for all persons who carry out professional work to possess certain qualifications valued for their academic significance, such as academic degrees, religious are no exception, if they are to engage in such fields. See SCHNEIDERS, *Selling All*, 58.

other benefits which accrue from it. Just like candidates to the priesthood, religious too are formed to be in service to the Church. They therefore require some level of theological and doctrinal competence to enable them to meet the demands of pastoral action within the Church.⁵¹ Such qualifications are also important in the context of apostolic efficacy and relevance. As D’Arc notes, techniques and skills of specific professions tend to quickly change and become out of date, calling for refresher courses, for updating and for further studies. Religious who perform their apostolic works as “professionals” are therefore no exception.⁵²

The possibility of professional training being undertaken in ecclesiastical and state institutions of higher learning is implied in *Perfectae caritatis*, no. 18. The decree recommends that such training be carried out in “a suitable residence,” that is, in an environment which is sensitive to the formative status of the candidate. Superiors and those in charge of formation have the task of ensuring that there is a balance between the environment which respects religious formation and the needs of such studies, as well as the maturity of the religious.

Paragraph §2 of c. 660 reads:

“During the time of this formation, offices and tasks which may impede it are not to be entrusted to the members.”

Recalling *Perfectae caritatis*, no. 18, it affirms the priority of formation after the novitiate over other activities. Conscious of the grave necessity of this formation in helping the candidates towards integration and unity of religious life necessary for permanent commitment, the canon

⁵¹ See *ibid.* where the author suggests that competence in the pastoral apostolate requires religious to have an equivalent of a Masters degree in divinity which would acquaint them with the sources of Catholic theology which includes, major methodologies and schools of classical and contemporary theological thought and the theology and spirituality of religious life.

⁵² See D’ARC, *Witness and Consecration*, 150.

cautions against any occupations or offices which may jeopardize its process and purpose. As J. Hite explains, even for the best and most justifiable reasons, such as pressure of apostolate, giftedness and professional efficiency of the candidate for the office or task at hand, duties and offices which take away the focus on formation are not to be committed to them. He adds that formation is not only for the apostolate but mainly for attaining the maturity to lead the life and to carry out the mission of the institute. Indeed, apostolic works carried out by religious in formation have probationary and formative dimensions; such works therefore are not to be so burdensome to the extent that formation is compromised.⁵³ The norm of the canon is directed to the internal authority of the institute which possesses the competence to assign tasks and offices to members. Pursuant to the provisions of c. 618, the text is a reminder to superiors of the manner in which they are to exercise their authority over members: in a spirit of service, of care and of love. It is therefore their duty to ensure that members in formation are not burdened with apostolic obligations which leave no room for their formation. Andrés suggests that the proper law of institutes is to determine the kinds of tasks and offices which would impede formation and also to make clear provisions especially on the manner of assigning religious to works and offices outside the institute.⁵⁴ This calls on competent superiors to ensure that proper clarity exists with regard to responsibilities, job description, and time for holidays, working environment and structures which respect the formation aspect of the religious, especially on those assignments outside the institute.⁵⁵

⁵³ See HITE, "Admission of Candidates," 164.

⁵⁴ ANDRÉS, "Commentary on Religious Institutes (cc. 607-709)," in *Exegetical Comm*, vol. 2/2, 1758.

⁵⁵ See *MR*, no. 57, in *AAS*, 70 (1978), 502, in *FLANNERY2*, 239-340; c. 678 § 2 and § 3. See also *PI*, nos. 66-71, in *AAS*, 82 (1990), 510-514, in *Origins*, 19 (1989-1990), 691-693.

2.1.3. Formulation of Canon 661 on the Responsibility of Members and of the Institute on Formation

This section discusses the sources and the adjustments of c. 661 from its first appearance in the 1977 *Schema* up to its final wording in the promulgated 1983 Code.

2.1.3.1. Sources of Canon 661

Canon 661 has its sources in: *Statuta generalia*, nos. 50-53,⁵⁶ *Sedes sapientiae*, no. 4, *Christus Dominus*, no. 16, *Perfectae caritatis*, no. 18, *Presbyterorum ordinis*, no. 19, *Ecclesiae Sanctae*, II, no. 19, *Ratio fundamentalis institutionis sacerdotalis*, no. 100, *Mutuae relationes*, no. 14 and *CIC/17*, c. 129. *Christus Dominus*, no. 16 affirms the duty of bishops to provide opportunities for apostolic updating and spiritual renewal in suitable centres of learning so that candidates lead pious lives and fulfill their ministry faithfully and fruitfully. *Presbyterorum ordinis*, no. 19 urges priests to be willing to take up studies in updating themselves for pastoral and apostolic works. The bishops are to provide the means and resources for such studies, especially a few years after their ordination.

Perfectae caritatis, no. 18 affirms the responsibility of individual religious for their ongoing formation and that of the superiors to make means and time available for this. *CIC/17*, c. 129 prescribes that training of priests in sacred sciences, tradition and solid doctrine from the Magisterium be continued after ordination and that profane sciences be avoided. *Statuta generalia*, no. 50 points out the significance of the conferences on morals and liturgy mentioned in *CIC/17*, c. 313 which the local ordinary obliges all the clergy in his diocese to attend under pain of penalty specified in *CIC/17*, c. 2377. *Statuta generalia*, no. 51 highlights the significance of the integration of spiritual and apostolic training of young priests and religious. This is to be

⁵⁶ *Statuta generalia*, nos. 50-53, in *The Apostolic Constitution Sedes Sapientiae and the General Statutes Annexed to It*, 67-70.

through spiritual direction, self-evaluation, probation and renewals. Formation is also to include moral, religious and priestly education coupled with faithfulness in priestly virtues, lengthy spiritual exercises and attendance of conferences and instructions on the knowledge of the institute. It is to be organized in accordance with the nature, character and purpose of the institute, while taking into account the institute's proper law (*Statuta generalia*, no. 52). The final probation for clerical religious is obligatory for all members. In circumstances where it is not possible to offer it, this has to be supplied for by other substitutes (*Statuta generalia*, no. 53). *Mutuae relationes*, no. 14 underlines the grave duty of superiors to foster fidelity to the charism and suitable renewal for religious life by means of fitting and updated formation. *Ecclesiae Sanctae*, II, no. 19 places the responsibility for suitable renewal on both the members and the internal authority of institutes. *Presbyterorum ordinis*, no. 19 highlights the personal responsibility of priests for apostolic and spiritual training and for the pastoral updating required for present times. *Ratio fundamentalis institutionis sacerdotalis*, no. 100 and *Sedes sapientiae*, no. 4 prescribe lifelong training for priests which is progressively perfected in the spiritual, doctrinal, pastoral and intellectual fields especially for young priests for their pastoral effectiveness.

The sources of canon 661 recognize ongoing formation as an obligation and a right for individual priests and religious and a duty of their respective authorities.

2.1.3.2. Development of Canon 661

The text which corresponds to that of canon 66 of the 1977 draft is as follows:

Per totam vitam sodales culturam, spiritualem, doctrinalem et technicam sedulo prosequi intendunt

et Moderatores pro posse adiumenta et tempus ad hoc eis procurent.⁵⁷

The canon underwent some changes in the 1980 draft. The phrase *sodales culturam* was replaced with *religiosi formationem suam*. This was to distinguish this formation as specifically focused on professed members and not all members of an institute (in a general sense, novices are also members). The word *technicam*, a term which limits this formation to mere acquisition of skills and abilities, was replaced with a more appropriate term, *practicam*, which broadened the understanding of this formation as that which equips members with the ability to adapt, apply and perfect what has already been learnt in a practical way. The phrase *prosequi intendant* was replaced by *prosequantur* and *Moderatores pro posse* by *Superiores*, while *eis* was moved from before the word *procurent* to before the word *adiumenta*. The word *Moderatores* changed to *Superiores*, following an earlier decision by the subcommission to replace certain terminologies which were not inclusive to all forms of consecrated life with more appropriate ones.⁵⁸ By the above changes, the subcommission affirmed that formation of religious after first profession is obligatory for all institutes. The internal authority of every institute has the grave responsibility to facilitate this formation and individual members are obliged to initiate it. The bracket also extended to the last word. The text of the 1980 draft thus reads:

Per totam vitam religiosi formationem suam spiritualem, doctrinalem et practicam sedulo prosequantur et Superiores eis adiumenta et tempus ad hoc procurent.⁵⁹

⁵⁷ *Communicationes*, 9 (1977), 57.

⁵⁸ *Communicationes*, 13 (1981), 177: "Through their entire life, religious are to continue diligently their spiritual, doctrinal, and practical formation. Superiors, moreover, are to provide them with the resources and time for this."

⁵⁹ McDONOUGH, *Ready Reference for the 1980 Schema*, 142: "throughout their entire life, religious should foster their own spiritual, doctrinal and practical formation and superiors should provide them the time and means to do this."

The 1982 draft retained the text as it is with addition of the word *autem* before the word *eis*. The canon reads:

Per totam vitam religiosi formationem suam spiritualem, doctrinalem et practicam sedulo prosequantur et Superiores autem eis adiumenta et tempus ad hoc procurent.⁶⁰

No further changes occurred and the text retained its form in the promulgated Code as canon 661.

2.1.3.3. Analysis of Canon 661

Canon 661 reads:

“Through their entire life, religious are to continue diligently their spiritual, doctrinal, and practical formation. Superiors, moreover, are to provide them with the resources and time for this.”

The canon treats the second aspect of post-novitiate formation whose purpose is oriented more towards fidelity to their vocation than preparedness for permanent commitment even though the two go together. The text spells out the responsibility of the religious for their own formation, not only during the period of temporary vows, but throughout their lives.⁶¹ Deriving from the nature of their consecration and the demands of the mission of the institute, all individual religious require continuous spiritual, doctrinal and practical renewal and updating for

⁶⁰ PONTIFICIA COMMISSIO CODICI IURIS CANONICI RECOGNOSCENDO, *Codex iuris canonici: schema novissimum*, 123: “Through their entire life, religious are to continue diligently their spiritual, doctrinal, and practical formation. Superiors, moreover, are to provide them with the resources and time for this.”

⁶¹ See *PI*, no. 67, on the reasons motivating ongoing formation. Firstly, the charismatic and eschatological role of the religious life within the Church requires continued fidelity by means of docility to the Spirit. Secondly, the challenges that arise from the world which is changing with increased rapidity demand a prompt response. Lastly, the very life of religious institutes and, especially their future, depend in part upon the permanent formation of their members. See *AAS*, 82 (1990), 511-512, in *Origins*, 19 (1989-1990), 692. See also FABER, “Formation and Commitment in the New Code,” 40.

the purpose of their personal growth and effectiveness in ministry.⁶² As Rincón-Peréz notes, there is no time in the life of a religious when self-sufficiency, ideal maturation and total configuration to the person of Christ (the ultimate goal of religious life) may be claimed to be complete.⁶³

The canon uses the Latin expression *sedulo prosequantur* which means “to continue carefully.” With such choice of words, the legislator appears to be conscious of the challenges and difficulties individual religious may encounter in taking up opportunities for ongoing formation. The canon seems to impress upon all religious not to compromise the task of ongoing formation for whatever reason or excuse they may have. This could be pressure from apostolic commitment or merely lack of interest or of courage to take up updating courses. It could also be in the form of giving priorities to other forms of training which are not directly in line with religious life or the purpose of the institute.⁶⁴

The canon explains that the task of formation of members, pursuant to canon 670, is the duty and responsibility of the institute through its authoritative agents. The canon speaks of “resources” and “time” to be made available by superiors. This responsibility, as Andrés explains, is not to be a passive one which superiors pass on to members, but one which they take up with commitment and diligence, conscious of the fact that the ongoing formation of members

⁶² See HITE, “Admission of Candidates,” 165. See also FABER, “Formation and Commitment in the New Code,” 40.

⁶³ See RINCÓN-PERÉZ, “Commentary on Institutes of Consecrated Life (cc. 573-746),” 526.

⁶⁴ See HITE, “Admission of Candidates,” 165. The author remarks that while spiritual renewal as an aspect of ongoing formation has primacy over all other aspects, most religious have difficulty in giving it priority in their initiatives for renewal. See also *VC*, no. 93, where it states: “The spiritual life must therefore have first place in the programme of Families of consecrated life, in such a way that every Institute and community will be a school of true evangelical spirituality” (in *AAS*, 88 [1996], 469, in *L'Osservatore Romano*, English ed., April 3, 1996, supplement, 18).

is not an option but an intrinsic aspect of religious life.⁶⁵ Internal authority has as its duty to ensure that the right to ongoing formation is accorded to members by means of practical initiatives and decisions.

Andrés points out that ongoing formation should not remain merely a good intention, but something which translates into a series of activities undertaken by the superiors. Such initiatives would include motivating members to take up opportunities provided to them, intervening in the planning of schedules within apostolic programmes which ensure that there is time available for such opportunities, exploring collaborative formation initiatives with other institutes or institutions, and drawing up a realistic budgetary plan which provides financial resources for ongoing formation. It would also include good planning for replacement in apostolates, proper and clear description of works, especially for assignments outside the institute and organizing courses for renewal and for updating the members on specific aspects of religious life. It also requires that religious houses have a well-stocked library with subscriptions to journals and reviews which are relevant to formation and other aspects of religious life. This is to ensure the constant updating of doctrinal, biblical, spiritual and theological knowledge by the members.⁶⁶

⁶⁵ See HITE, "Admission of Candidates," 166.

⁶⁶ See ANDRÉS, "Commentary on Religious Institutes (cc. 607-709)," 1760-1761. For more extensive reading in ongoing formation for religious, see also J. GALLANZA, "Continuing Formation: Perspectives from *Vita consecrata*," in *R/R*, 66 (1997), 468-477; S. RENDONA, "Growing in the Oblation Formation after the Novitiate," in *Consecrated Life*, vol. 16, no. 1 (1991), 59-82; J. AUBRY, "Ongoing Formation," in *The Way Supplement*, 41 (1981), 74-87; L. MEES, "Ongoing Formation for Mission," in *UISG Bulletin*, no. 107 (1998), 40-44; R. EDENHOFER, "Some Principles for the Solution of the Problems in Sisters' Formation," in *Sisters Formation Bulletin*, vol. 2, no. 3 (1956), 5-7; P. EDWARDS, "Principles of Further Formation," in *The Way Supplement*, 32 (1977), 27-37; T.A. ESCAPALLADA, "Sentido de la formación permanente para la vida religiosa," in *Ciencia tomista*, 92 (2001), 441-466; K. O'ROURKE, "The New Instruction on Formation of Religious," in *CLSA Proceedings*, 31 (1969), 102-111; D. O'SHEA, "Formation in the Postmodern Age," in *RLR*, 39 (2000), 76-86; R. ROHR, "Religious Life and Formation: Same Thing?" in *RLR*, 43 (2004), 94-97; T.R. BENEDETO, "Formação permanente desafio à renovação vida religiosa," in *Direito e pastoral*, vol. 17, no. 46 (2003), 105-134; G. ATHOL, "Communal Perspectives of Formation," in *The Way Supplement*, 56 (1986), 110-115; E. ANN, "Apostolic Formation through the Curriculum," in *Sisters Formation Bulletin*, vol. 4, no. 3 (1958), 1-7; AQUINAS, "Education of Sisters in Extension Courses," 4-9; C. SERRAO, *Discernment of Religious Vocation: Formation towards Transformation*, Mysore, Dhyanavana, 2004.

2.2. Canonical Principles Governing Formation during the Period of Temporary Vows in the 1983 Code of Canon Law

Besides the programme and the manner of carrying it out, the formation of religious during the period of temporary vows also includes a series of activities structured in conformity with its process and purpose. The whole process of this formation is programmed within a time frame with specific tasks to be accomplished by designated persons and with the desired outcome projected at its conclusion. This section treats of universal law which regulates the duration, the tasks of those charged with formation, the rights and obligations of those in temporary vows and the manner in which this formation is concluded.

2.2.1. Duration

On the duration of the time of temporary vows, the universal law treats of its ordinary period, extension of the time and anticipation of profession. For the ordinary period of temporary vows, the universal law prescribes a duration of 3-6 years (c. 655) with a possible extension of an additional three years (c. 657 § 2). The extension of the additional three years is an exception of law which must be motivated by a just reason which, in the judgment of the competent superior who is to admit, provides grounds for extension of the duration.⁶⁷ In other words, initial formation during the period of temporary vows is to be concluded within six years. The Code empowers individual institutes to establish the structure of this duration that includes the

⁶⁷ Canon 657 § 2 uses the word, “opportune time” as motivation for the extension of the period of temporary vows. This is for the best interest of the candidate and the institute to achieve efficacy. See ANDRÉS, “Commentary on Religious Institutes (cc. 607-709),” 1741. It is also a time which both the institute and the member in formation consider appropriate for making perpetual profession. Rosemary Smith gives the reasons which may justify such an extension: some less serious doubt on the candidate’s maturity on the part of the institute; need for more apostolic experience; young age and necessity for completing some aspects of the formation programme. See SMITH, “Commentary on Formation of Religious (cc. 659-661),” 826.

particulars of its length, evaluation procedures and the manner of renewals.⁶⁸ The anticipation of perpetual profession which technically shortens the total period of temporary profession is mainly a provision for pastoral reasons.⁶⁹ The Code allows for up to three months of anticipation of profession according to canon 657 § 3 which actually creates an exception to canon 655. The Code, however, does not mention the possibility of anticipation of renewal of vows; nevertheless some authors express the opinion that the same reasons for anticipating perpetual profession can be used for anticipating the renewal of vows.⁷⁰

The rationale behind the prescription of a definite duration of time for temporary vows and the possible extension is to give the candidate ample time to have a lived experience in the institute. It is also to help the candidate gain the necessary level of maturity for perpetual profession and to give those in charge of formation enough time to foster this maturity and assess it in view of the lifelong commitment in the institute. This is what McDonough refers to as “responsible formation.”⁷¹ It is a balance of time which is, on the one hand, not too short to ascertain clear indications of the necessary maturity for final commitment and for realistic assessment of progress toward readiness for this final incorporation, and, on the other hand, a period not unduly prolonged if positive hope for maturity is not foreseen.⁷² Andrés adds that if the decision to conclude the period of temporary profession is put off for too long, this might prove to be a waste of time for both the individual and the institute and create difficulties for the

⁶⁸ Canons 463, 465 and 526 of the Eastern Code refer to temporary vows in orders and congregations for duration of time between a minimum of three years up to six years, while monasteries can admit to perpetual profession after 3 years of novitiate.

⁶⁹ See E. McDONOUGH, “Renewal of Temporary Vows and Perpetual Vows,” in *R/R*, 60 (2001), 433.

⁷⁰ See *ibid.*, 434; SMITH, “Commentary on Formation of Religious (cc. 659-661),” 824. See also *CIC/17*, c. 573 § 2 on the possibility of one month anticipation for temporary but not for perpetual vows.

⁷¹ McDONOUGH, “Renewal of Temporary Vows and Perpetual Vows,” 434.

⁷² See *ibid.*

member to return to secular life in case of non-admission to profession. He argues that if after six years, the required maturity is not evident, there is doubt that an additional three years will guarantee it.⁷³

2.2.2. Role of Formators

The present Code does not explicitly specify the office of the director and teachers of those in temporary vows, however their necessity and tasks are implied in canons 660 § 1 and 659 § 1. These canons, interpreted analogously in the context of canons 650-652 on the director of novices and assistants, allow institutes, in accordance with their proper law, to establish an office of director of temporarily professed. Indeed, more clarity on the manner of designating the person to be appointed to this office, the qualities required and the roles of the director is provided in the subsequent post-conciliar documents of the Holy See on formation.⁷⁴

Besides the director, canons 660 and 661 on the content and pedagogy of formation of religious suggest the availability of qualified and competent teachers. Such teachers are to train religious especially through courses which lead to appropriate academic accreditations acquired in institutions outside the institute. However, in whichever manner or place such courses are undertaken, those in charge of formation are to ensure that the harmony of the elements of formation in accord with the purpose and nature of the institute is maintained.⁷⁵

⁷³ See ANDRÉS, “Commentary on Religious Institutes (cc. 607-709),” 1739.

⁷⁴ See *PI*, nos. 30-31, in *AAS*, 82 (1990), 492-493, in *Origins*, 19 (1989-1990), 686; *Attenta alla condizioni*, nos. 23-26, in *Enchiridion Vaticanum*, vol. 17, 1367-1371, in *CLD*, vol. 14, 618-620.

⁷⁵ For more reading on formation personnel, see C. BROWNING, “Practical Points for Directors of Young Religious,” in *Sisters Formation Bulletin*, vol. 4, no. 4 (1958), 8-14; F.G. MORRISEY, “Practical Points for Formation Directors in the New Code,” in *In-formation*, no. 92 (1986), 1-5; C. REGAN, “Integral Formation,” in *RLR*, 34 (1995), 345-351; K. WENZEN, *Turnover and Burnout among Vocation and Formation Directors: An Exploratory Survey*, Washington, DC, Centre for Applied Research in Apostolate, 1982.

2.2.3. Rights and Obligations of Religious in Temporary Vows

Within the canonical tradition of the Church, the subject of rights and obligations is of great significance. Unlike in the secular legal system whereby rights and obligations have their origin in law, in the ecclesiastical canonical system, as E. McDonough explains, rights and obligations arise primarily - but not exclusively - from common mutual and reciprocal obligations coupled with response to a personal experience of God's initiative. Such a response entails certain consequences which we refer to as obligations.⁷⁶

The 1983 Code has specified certain rights and obligations which are applicable to all the Christian faithful (cc. 208-223) by virtue of their baptismal consecration (c. 207) and of full communion with the Church (c. 205). Besides the common rights and obligations, the Code also lists some other rights and obligations for those Christian faithful who have assumed a specific state of life within the Church as clerics (cc. 273-289).

In the section of Consecrated Life and Societies of Apostolic Life, canons 662-672, the Code has prescribed obligations and rights proper to religious, deriving from their consecration through religious profession. On the surface, as D.F. O'Connor remarks, these canons with the exception of canon 670, "do not specify any rights but only state exhortations and obligations."⁷⁷ McDonough clarifies, however, the possible cause for misunderstanding when she explains that the specific norms on rights and obligations of religious have to be understood from the perspective of the overall canonical system of the Church. This is in relation to juridical consequences which arise from certain religious acts which are contractual in nature.⁷⁸

⁷⁶ See MCDONOUGH, "Understanding Obligations and Rights in Church Law," 779.

⁷⁷ See O'CONNOR, *Witness and Service*, 51.

⁷⁸ See MCDONOUGH, "Understanding Obligations and Rights in Church Law," 782.

The norms dealing with the obligations of religious include: the following of Christ as the supreme rule (c. 662), spiritual exercises (cc. 663-664), fraternal life in common and residence in a religious house (c. 665), prudent use of modern means of social communication (c. 666), practice of solitude (c. 667), observing the regulations on personal property (c. 668), wearing of religious garb or appropriate secular dress as a witness of consecration and poverty (c. 669) and obtaining appropriate permission from legitimate superiors before accepting duties and offices outside the institute (c. 671). Canon 672 specifies other obligations proper to clerics by which religious too are bound.⁷⁹ The reciprocal obligation of the institute to provide for its members, according to the proper law, all that is necessary to fulfill their vocation is prescribed in canon 670. Commenting on the canon, D.F. O'Connor points out that the text uses the preceptive word "must." This implies that it is imperative for every institute, through its designated agents, to ensure that all the needs of members necessary for the fulfillment of their vocation are met. In this sense, the canon provides an umbrella combination of the rights of members stemming from the obligations placed on them.⁸⁰

With regard to those in formation during temporary vows, rights and obligations take a formative and probationary perspective. The obligations listed in canons 662-672 reinforce the demands of the various components and manner of formation specified in canons 659-661. A correlation between the obligations listed for religious and the prescription on formation is therefore evident. The obligation to continuous imitation of Christ and practice of spiritual exercises conforms to the spiritual and dogmatic aspects of formation specified in canon 660 § 1. In the context of probation, spiritual and dogmatic training is to lead the candidates to a genuine

⁷⁹ See footnote no. 76 in Chapter One of this study.

⁸⁰ See O'CONNOR, *Witness and Service*, 49.

faithfulness to the spirituality and charism of the institute and a deeper union with God through prayer, solid sacramental life and love of Sacred Scriptures. Spiritual training is also to foster the development in virtue, a deeper understanding and appreciation of the evangelical counsels and the assimilation of what *PI*, no. 6 refers to as “all in which religious identity consists.”⁸¹

The obligation of fraternal life in common in a religious house, prudence in use of social means of communication and the practice of solitude are all connected to the required maturity and unity of life which comes as a result of the harmonization of all the aspects of formation. This is to lead to a balanced and integrated life which provides a good basis for admission to perpetual commitment. The remaining obligations reinforce the apostolic formation that demands deeper ecclesial awareness and respect for the hierarchy. This is to be demonstrated by the love of the institute’s charism and apostolic zeal so that members of a particular religious institute live and carry out the mission of the institute as it is done in the institute.⁸²

Other than the norms on rights and obligations applicable to all religious, the Code also prescribes other regulations which are applicable exclusively to religious in temporary vows, deriving from the temporary juridical nature of their commitment. Of such we note: cessation or renunciation of personal property according to the nature of the institute (c. 688 § 1 and § 4), dismissal for even less grave reasons (than those stipulated in the universal law) determined in the proper law (c. 696 § 2), for illness contracted even after profession (c. 689 § 2) and the incapacity to transfer to another institute (c. 684 § 1). In the Eastern Code however, transfer of a temporarily professed religious is permissible (*CCEO*, c. 545 § 2).

The whole issue of granting passive and active voice to temporarily professed, even

⁸¹ *PI*, no. 6, in *AAS*, 82 (1990), 475, in *Origins*, 19 (1989-1990), 679.

⁸² See ANDRÉS, “Commentary on Religious Institutes (cc. 607-709),” 1765.

though not prescribed in the Code, remains a matter of further discussion as the current position of the Holy See remains non-affirmative. The same position applies to the question on whether the temporarily professed can hold the office of local superiors.⁸³

2.2.4. Conclusion of the Period of Temporary Profession

The overall aim of the period during temporary profession is to help the candidate acquire the necessary maturity for ultimate permanent profession. This desired outcome, however, is not always automatic. In order to provide for further discernment and testing of the vocation of the member, the time period of temporary vows is therefore structured into a series of formative activities and assessment. The Code provides three options for the conclusion of temporary vows: 1) admission to renewal of vows, 2) admission to perpetual profession, and 3) definitive separation from an institute.

On admission to renewal of vows, the law requires that at the end of the period of profession, a member in temporary vows freely requests to renew the vows. The candidate may be admitted to do so if judged suitable by the competent superior. The rationale is, as R. Smith explains, that the period of temporary vows is a time of continuing formation, and therefore, assessment for the required suitability is important at every juncture.⁸⁴ Smith adds that the periodic assessment, which includes the question of expectations and goals, reviewed and evaluated with the candidate and all those charged with the task of formation, is important in helping both the member and the institute to assess the state of the vocation of the member at

⁸³ CONGREGATION FOR RELIGIOUS AND FOR SECULAR INSTITUTES, Reply concerning Granting Passive Voice to Temporary Professed, January 17, 1970, in *CLD*, vol. 7, 526-527. The reply states (at 526): “[...] this Sacred Congregation does not believe that granting passive voice to sisters in temporary vows or promises would be a prudent experiment because of their lack of maturity among other reasons.” See also *ID.*, May the Temporarily Professed Be Granted Active and Passive Voice in the Election of Delegates to the General Chapter and May They Be Appointed Local Superiors? in *Informationes*, 1 (1976), 71-73.

⁸⁴ SMITH, “Commentary on Formation of Religious (cc. 659-661),” 823.

specified times. It also gives an opportunity for pointing out the areas of further growth with spelt-out desired outcomes within specific timelines.⁸⁵

The second option for the conclusion of temporary vows is the admission to perpetual profession. The requirements for the validity of perpetual profession are specified in canons 656 §§ 3-5 and 658. Proper law may place additional requirements. The law demands that at the end of the period of temporary profession and at free request by the member, the competent superior may admit the member to perpetual profession, having judged his or her suitability (c. 657 § 1). The judgment of suitability is based on the presumption that throughout the period of temporary vows, the member's training, direction, and evaluation have been ongoing. The proper law of each institute is to specify the manner of assessment so that the decision is reached with maximum objectivity.⁸⁶ Smith suggests that the proper law is to prescribe a period of intense immediate preparation which includes some form of spiritual exercises, for instance, the 8 or 30 day retreat before making perpetual profession as mentioned in *Renovationis causam*, no. 9.⁸⁷

The last option for the conclusion of temporary vows is definitive separation from the institute, which can be voluntary or involuntary. According to canon 688, voluntary separation can occur during or at the end of the period of temporary vows. If it happens before the expiry of the period of temporary vows, the provisions of canon 688 § 2 are to be followed. An indult of departure is to be granted by internal authority. For validity, the indult has to be confirmed by the diocesan Bishop of the house of assignment for institutes of diocesan right and autonomous

⁸⁵ See *ibid.*

⁸⁶ See *ibid.*, 824.

⁸⁷ *Ibid.*

monasteries mentioned in canon 615. This confirmation is, however, not required for members of institutes of pontifical right.⁸⁸

For involuntary departure, universal law foresees two situations: exclusion from making further profession at the expiry of the time of profession (c. 689 § 1) or dismissal during the period of temporary vows (c. 696 § 1). Given the tedious process of dismissal, scholars like S. Holland recommend that for temporarily professed members, the better option is to wait for the expiry of the period of temporary vows and then exclude them from making further profession.⁸⁹ In any case, it will depend on the gravity of the motivating cause and its effects on the rest of the members as certain circumstances may warrant immediate decisions.

Exclusion from further profession or non-admission to perpetual profession is the second manner of involuntary departure. Elio Gambari explains that exclusion, which is a juridical act of competent authority, is merely the refusal of admission to further profession, whether the latter is temporary or definitive.⁹⁰ Though not qualified as dismissal,⁹¹ it amounts however, to definitive separation from the institute. The authority to exclude, therefore, appertains to the competent major superior, after consulting his or her council.⁹² For exclusion to be applied, the Code requires that the motivation be based on just cause[s] which, as McDonough explains, “must be proportionate to the matter at hand and not merely insignificant reasons or personal

⁸⁸ See MCDONOUGH, “Renewal of Temporary Vows and Perpetual Vows,” 436.

⁸⁹ See S.L. HOLLAND, “Article 2: Departure from an Institute (cc. 686-693),” in *CLSA Comm2*, 867.

⁹⁰ See E. GAMBARI, “The Proposed Canons on the Consecrated Life Explained: IV,” in *RfR*, 39 (1979), 888.

⁹¹ See VOEGTLE, *Canonical Reasons for the Rejection of Candidates*, 84, where he distinguishes dismissal from exclusion. He explains that dismissal refers to being definitively cut off from the community and being relieved of the obligations while one is still attached to the institute by bond of profession while exclusion is an act of the competent superior to prevent one whose bond has expired from renewing the link with the community.

⁹² See GAMBARI, “The Proposed Canons on the Consecrated Life Explained: IV,” 888.

preferences.”⁹³ Elio Gambari adds that in judging the sufficiency of the just cause[s], the common good of the institute is to be considered above that of the individual.⁹⁴ Since exclusion is not a penalty, it therefore qualifies as legitimate departure with possible readmission according to c. 690. The Code does not provide a special process for exclusion, but by reason of charity and equity envisioned in canon 702, reasons for such exclusion can be presented to the member in summary form and clearly stated with a consideration of a possible readmission to the institute if necessary.

On the second manner of involuntary separation, canon 689 § 2 treats the rather controversial issue of the non-admission to profession due to illness which renders a member incapable of leading the life of the institute.⁹⁵ The Code presents a reformulation of the same norm in canon 637 of the 1917 Code which disqualified one from admission to profession due to illness which was fraudulently concealed or hidden by the candidate before the profession. The present Code departs from the motivation of concealment of illness as grounds for non-admission. Such a concealment is a form of fraudulent act which consequently, renders any

⁹³ See *ibid.*, 859; E. McDONOUGH, “Exclusion from Profession at the Expiration of Temporary Vows,” in *RfR*, 60 (2001), 543.

⁹⁴ Gambari lists, by way of example, the following reasons for exclusion from making further profession: 1] Lack of religious spirit observable in an absence of a firm and constant vocation to consecrated life coupled with serious doubts as to the general suitability for religious life; 2] Inability to carry the apostolic works of the institute. This may be demonstrated in ineptitude for the work of the institute arising from a lack of general ability, intelligence, or application, from a defect of prudent judgment, laziness, negligence, or from culpable or inculpable causes; 3] Lack of the ability for spiritual progress, that is, if it is foreseen that the member will be only mediocre in the spiritual life due to habitual neglect and carelessness in religious observance with demonstrated incorrigibility even in less obvious matters; 4] Lack of community spirit causing serious discord in the community; 5] and when it is foreseen that the subject will be more harmful than useful in the institute. See GAMBARI, “The Proposed Canons on the Consecrated Life Explained: IV,” 888. Hite explains that justification is to be based on the review process. The reasons for excluding a member from further professing are to stem from the structured criteria of assessment of which the member has knowledge. Such criteria can be stipulated in the proper law. See HITE, “Admission of Candidates,” 159. Cf. also *Communicationes*, 13 (1981), 335.

⁹⁵ Gambari considers ill-health to involve serious harm. He argues that “a slight deficiency in physical health, for example, would not in itself exclude suitability for the consecrated life” (GAMBARI, “The Proposed Canons on the Consecrated Life Explained: IV,” 889).

subsequent act invalid according to canon 643 § 1, 4°.

Illness therefore disqualifies one from admission to profession but only under the following four conditions: 1) that psychic or physical illness exists, contracted even after profession; 2) that more than one expert has confirmed the illness as rendering the member unsuitable to lead the life of the institute;⁹⁶ 3) that the illness was not contracted due to negligence of the institute or because of work performed in the institute; 4) that the competent major superior has heard the council before making the decision of non-admission to profession.⁹⁷ The member may lodge hierarchical recourse if he or she believes the decision to exclude from making further profession to be unreasonable or unjustified. Gambari notes, however, that recourse to the Holy See against exclusion has very little hope of success except in the case of a clearly illegal exclusion. The Holy See is evidently conscious that universal law

⁹⁶ Experts referred to here are those specified in c. 1574, that is, those who because of their expertise are to be consulted as a requirement of the law, whenever there is need “to establish some fact or to discern the true nature of some matter.” The notion of expert in canon law, as K.E. Boccafola points out, is a broad one and covers different fields of specialization. See K.E. BOCCAFOLA, “Commentary on Experts,” in *Exegetical Comm*, vol. 4/2, 1328-1331. In the case of c. 689 § 2, experts preferably would be those who understand and respect religious life and therefore best suited to evaluate potential candidates for membership in religious institutes. See R. SMITH, “Article 1: Admission to the Novitiate (cc. 641-645),” in *CLSA Comm*2, 807. Jesus Torres explains that the lack of suitability referred to is related to the kind of life one is to lead in a particular institute and not necessarily regarding religious life in general. However, he points out the dilemma in ascertaining this “lack of suitability to lead the life in the institute” by the experts as they are not competent in judging the incompatibility of illness with religious life, a decision which rests with the competent authority of the institute. See J. TORRES, “Dispensation from Vows,” in *Consecrated Life*, vol. 18, no. 1 (1995), 89.

⁹⁷ CONGREGATION FOR INSTITUTES OF CONSECRATED LIFE AND SOCIETIES OF APOSTOLIC LIFE, Decree on Confession for Religious *Dum canonicarum*, December 8, 1970, in *AAS*, 63 (1971), 318-319, English translation in *CLD*, vol. 7, 533. See also J. TORRES, “Dispensation from Vows,” 86-87. The subject of assessment of candidates for admission to membership in religious institutes continues to be of interest to many authors. For further reading, see for instance, W.J. COVILLE et al., *Assessment of Candidates for Religious Life: Basic Psychological Issues and Procedures*, Washington, DC, Centre for Applied Research in Apostolate, 1968; T.H. MAMINIMINI, *Maturity and Its Assessment for Admission of Candidates to Religious Life, with Particular Reference to Institutes in Zimbabwe*, JCD thesis, Ottawa, Saint Paul University, 2000; L. GENDRON, “Some Moral Problems Connected with Psychological Testing of Religious, Seminarians and Candidates,” in *Linacre Quarterly*, 46 (1979), 167-177; R. HILL, “Screening Candidates: Need to Know,” in *RfR*, 45 (1986), 458-462; C.C. EZEANI, “Religious Formation and the Integral Psychological Development of Candidates,” in *RfR*, 70 (2011), 226-275; T.A. ESCAPALLADA, “Sentido de la formación permanente para la vida religiosa,” in *Ciencia tomista*, 92 (2001), 441-466; F.G. MORRISEY, “Issues of Confidentiality in Religious Life,” in *Bulletin on Issues of Religious Life*, 4 (1988), 1-10.

empowers the competent superiors to judge the suitability of a member for profession and consequently of the sufficiency of the motives for exclusion from profession.⁹⁸

Another matter specified in canon 689 § 3 (with a parallel in *CCEO*, c. 547) concerns the juridical status of a member who becomes insane during temporary vows. While the 1917 Code had a *lacuna* on the issue, the 1983 Code proceeds with a spirit of charity and justice: the member remains in the institute and is taken care of indefinitely on the basis of their incapacity to place a juridical act according to canon 124.⁹⁹ Some authors suggest that the possibility for the member to be cared for by the family could be explored but such is not to replace the responsibility of the institute.¹⁰⁰

2.3. Documents on Formation after the 1983 Code

The section treats the post-conciliar documents which elaborate on the norms of formation of religious. They are the following: Directives on Formation in Religious Institutes *Potissimum institutioni*, 1990, *Instrumentum laboris* of the 1994 Synod of Bishops on Consecrated Life, Post-Synodal Apostolic Exhortation *Vita consecrata*, 1996, Instruction on Inter-Institute Collaboration for Formation *Attenta alla condizioni*, 1998 and Instruction *Starting Afresh from Christ*, 2002.

2.3.1. Directives on Formation in Religious Institutes *Potissimum institutioni*, 1990

The document Directives on Religious Formation was issued on February 1990 after a long history of drafting. During Vatican Council II, the then Congregation for Religious and

⁹⁸ See GAMBARI, “The Proposed Canons on the Consecrated Life Explained: IV,” 890.

⁹⁹ CONGREGATION FOR RELIGIOUS, reply *De religiosis professis votorum temporarium in amentiam incidentibus*, February 5, 1928, in *AAS*, 17 (1925), 107.

¹⁰⁰ See HITE, “Admission of Candidates,” 241.

Secular Institutes issued an instruction, *Renovationis causam*, which reordered the norms on formation in the 1917 Code. This was followed by a process of consultation with religious institutes initiated by the Congregation on the topic of formation. The fruit of this consultation, completed in 1973, was a new formation document. Its publication was postponed to allow for completion of the revision of the Code of Canon Law. However, the promulgation of the new Code necessitated a second round of consultation on formation which was conducted between 1986 and 1989. Finally, the instruction *Potissimum institutioni*, directed specifically to formation of members of religious institutes, appeared in 1990.¹⁰¹ Published as an instruction, it was intended by the Congregation, according to canon 34, to clarify and give further directives on the application of existing norms.

The instruction has an introduction, five parts and a brief conclusion: introduction (nos. 1-5); followed by chapters related to religious consecration (nos. 6-18); common aspects of formation (nos. 19-41); stages of formation (nos. 42-71); formation in strictly contemplative institutes (nos. 72-84); five practical matters in current formation (no. 86) and a brief conclusion (no. 110).

The introduction begins by explaining the purpose of formation of religious, affirming that formation has been a constant concern for the Church since Vatican II and giving examples of documents which have addressed the topic (nos. 1-2). The document then specifies its recipients as religious institutes (no. 5) and states its purpose, “to help institutes [...] to elaborate their own programs of formation (*ratio*), as they are obliged to do by the general law of the Church. On the other hand, men and women religious have the right to know the position of the Holy See on the present problems of formation and the solutions which it suggests for resolving

¹⁰¹ CONGREGATION FOR INSTITUTES OF CONSECRATED LIFE AND SOCIETIES OF APOSTOLIC LIFE, Directives on Formation in Religious Institutes *Potissimum institutioni*, February 2, 1990, in *AAS*, 82 (1990), 470-532, English translation in *Origins*, 19 (1989-1990), 677, 679-699.

them” (no. 4).

The first part of the document addresses the topic of religious consecration and formation (nos. 6-18). It reaffirms that a vocation to religious life fuses the mysterious dynamic of divine call and of human response (nos. 8-9). The act of profession consecrates the person to God and simultaneously incorporates that person into a particular religious institute (no. 10). Consecration also leads to the living of evangelical counsels in a probationary manner for those in formation. The document outlines specific aspects to be addressed in formation pedagogy regarding chastity (no. 13), poverty (no. 14), and obedience (no. 15). The evangelical counsels are to be practiced according to the purpose and character of each institute but in the ecclesial context. Formation is to lead to unity of life so that, there is no dichotomy between “[the] ends of religious life and the ends of the institute, religious life itself and the apostolic activities, religious consecration to God and mission in the world” (nos. 17-18).

The second part of the instruction entitled Common Aspects of Formation has four subdivisions: a) The Agents and Environment of Formation; b) The Human and Christian Dimension of Formation; c) Asceticism; and d) Sexuality and Formation (nos. 19-41). The agents and environment of formation are listed as: the Holy Spirit, the Virgin Mary, the Church (and “the sense of the Church”), the community, the religious themselves and, finally, those in charge of formation, that is, the formators and superiors (nos. 19-35). The document emphasizes the role of the Holy Spirit in discerning the will of God in formation (no. 19) and of Mary, Mother of God, as a model of total surrender (no. 20). As religious life pertains to the life and holiness of the Church, the instruction recommends formation which promotes an organic sense of ecclesial communion. This is to be characterized by love and respect for the pastors of souls, taking the Church as the *locus* where religious persons are received, incorporated and nourished as part of

the body, the Church (nos. 21-25).

The instruction perceives formation as a corporate work of the entire religious family, having its *locus* in the community. The religious community, bonded together in fraternal love, a common spirituality and charism, a corporate apostolate and identity, characterized with a spiritual atmosphere, an austerity of life, and apostolic enthusiasm provides the formative environment for new members and thus fosters formation (nos. 26-29). Besides the community, the candidates too have the duty to contribute to their own formation as active participants, while those in charge of formation have the duty to assist them to discern the authenticity of their vocation and further their dialogue with God (nos. 30-31).

The document highlights the significance of human development and Christian formation necessary for the required maturity for religious life (no. 33) which must be ascertained by competent superiors and formation personnel at the time of admission. The instruction stresses the importance of integral formation which synthesizes the moral, physical and spiritual dimensions of the personality of the candidate (nos. 33-34). It highlights the primacy of spiritual formation (no. 35) and the significance of asceticism in the life of religious. Formation is also to include orientation towards the appropriate practice of asceticism as the means of counteracting the secular values and of acquiring virtues (no. 38). The document recognizes the challenge of distorted knowledge and understanding the young people of today have of sexuality. Formation therefore is to promote the correct understanding of human sexuality, so that candidates gain deeper knowledge of their sexuality and its specific role in the plan of God (nos. 39-40). It urges imitation of Mary, Mother of God as model of the feminine religious life (no. 41).

The third part of the document deals with various stages of formation and outlines the purpose and structure of each stage. It explains that the pre-novitiate is to ensure proper

preparation of the candidate before novitiate. The material for formation and the pedagogy for this stage are based on the indicators of maturity required in accordance with the proper law of individual institutes (nos. 42-43). It should be clear that at this stage, candidates are not yet members of the institute (no. 44). The instruction explains the purpose of the novitiate as prescribed in canon 646, with emphasis on the duty of the individual institutes in drawing up the *ratio* of formation configured to the individual needs and the pace of growth (nos. 52-53).

Formation during the period of temporary profession is to be a continuation of what is prescribed in canon 659 §§ 1-2. It should aim at real progress in unity and harmony in the life of the candidate. This is in view of perpetual commitment and for apostolic effectiveness according to the purpose of the institute and the needs of the Church. Formation is to be organized under the direction of a specific professed religious, designated for this task and, preferably, in a community setup (nos. 60-65). Continuous formation after perpetual profession ought to be directed towards the wholeness of the person in relation to the spiritual mission of religious life. This is to include the deepening of one's spiritual life within the institute, pastoral collaboration with others, doctrinal and professional updating and an increased understanding of the community's charism (nos. 66- 70).

In contemplative institutes *Potissimum institutioni* recommends formation which includes human and religious culture, Sacred Scripture, *lectio divina* and liturgy, with emphasis on a healthy and meaningful practice of asceticism. The structure of this formation is to be flexible in its successive stages. The document recommends an organized collaboration in formation initiatives among monasteries of the same order or federation, without prejudice however, to the formation programme of each institute, drawn according to the norms of universal and particular law (nos. 71-85).

In a unique section entitled ‘Actual Questions concerning Religious Formation,’ the instruction highlights some areas of concern with regard to formation. It identifies these as: the effects of modernity and secular ideologies on youth and their apparent lack of theological foundation, dangers of divided loyalty to different spiritualities which may arise from membership in ecclesial movements, and the impact of culture on religious formation. The instruction reaffirms the rightful autonomy of religious institutes with regard to the bishops’ role as authentic teachers and witnesses of the faith (nos. 95-96), while it encourages cooperation and collaboration concerning initiatives for formation at the parish, diocese and inter-institutional levels. It recommends a *Ratio fundamentalis* for each institute, harmonized with the universal law for religious candidates for orders and offers a reminder that formation work is an ecclesial responsibility (nos. 97-109). The instruction ends by urging a Marian orientation for all religious (no. 110).

In general, *Potissimum institutioni* addresses the subject of formation from the perspective of the ongoing renewal process of religious life since Vatican II and the challenges which have come with it. This is in the context of the rapid social changes in the world of which candidates are a product and the new realities facing religious life, including diminishment and lack of vocations in some parts of the world.

Specifically with regard to formation during the period of temporary vows, the instruction is conscious of the minimal norms prescribed in the Code which still require further specifications. It therefore treats the period of temporary vows with detailed directives.¹⁰² The instruction dedicates nos. 59-60 to this stage of formation. It re-affirms the prescription of the

¹⁰² Elizabeth McDonough states: “Since the norms of the Code regarding formation are thorough but minimal, and since the formation of religious is foundational for the whole of one’s religious life, this recent instruction provides a helpful explication of this indispensable element of a religious vocation” (E. McDONOUGH “Directives on Religious Formation: *Potissimum Institutioni*,” in *RfR*, 54 [1995], 148).

Church (c. 659 § 1) on its purpose as preparing the candidate toward integration of life. This entails deepening of religious identity and gaining the necessary ability to meet the requirements and expectations of the contemporary world, coupled with spiritual and apostolic enthusiasm. Since the aim of formation during the period of temporary vows is striving for the unity of life, the programme, presented in the context of community life, is to be adapted to the needs of individuals, taking into account the circumstances related to place and time and is to lead to the harmonization of different aspects of formation. *Potissimum institutioni* focuses on the person of the candidate who comes from the contemporary world and culture. This is in view of how best the candidates can be formed in order to live religious life more fully and fulfill their mission in the particular institute.

Potissimum institutioni, by its pedagogical and systematic presentation of the directives on all phases of formation of religious, is a valuable resource material for institutes in their formation work. It expresses the concern and dedication of the Church to quality formation of religious. It situates formation in the ecclesial context and presents it as a communal task of the ecclesial community.¹⁰³ It offers a candidate-oriented pedagogy for formation which responds to the formation needs and challenges of a new generation.¹⁰⁴ Sante Bisignano argues that even though *Potissimum institutioni* does not provide all the answers to the challenges facing formation, it however remains a valuable instrument for the journey of formation.¹⁰⁵ It sums up the most significant experiences of formation and offers criteria for their evaluation in the process of integral formation.¹⁰⁶ Vincente Kiaziku concludes that *Potissimum institutioni* is the

¹⁰³ Ibid.

¹⁰⁴ S. BISIGNANO, "A New Way of Talking about Formation," in *Consecrated Life*, vol. 16, no. 1 (1991), 4.

¹⁰⁵ Ibid., 12.

¹⁰⁶ Ibid., 9.

first document to tackle in a complete and systematic manner the theme of formation of religious life.¹⁰⁷

2.3.2. *Instrumentum laboris* of the 1994 Synod of Bishops on Consecrated Life

The *Instrumentum laboris*, or the working paper for the 9th General Ordinary Assembly of the Synod of Bishops, issued on 20 June 1994,¹⁰⁸ was the fruit of worldwide consultation on the synodal topic,¹⁰⁹ following the release of the *Lineamenta*, on 20 November 1992.¹¹⁰ Indeed, the *Lineamenta* provoked severe criticisms¹¹¹ and the ensuing reworking of the document

¹⁰⁷ C.V. KIAZIKU, *Consecrated Life in Bantu Africa*, Nairobi, St. Paul Publications - Africa, 2007, 186.

¹⁰⁸ SYNOD OF BISHOPS, THE 9TH GENERAL ORDINARY ASSEMBLY, *De vita consecrata deque eius munere in Ecclesia et in mundo: instrumentum laboris*, Libreria editrice Vaticana, 1992, English translation in *Origins*, 24 (1994-1995), 97, 99-138.

¹⁰⁹ See R. McDERMOTT, "The Fruits of Consultation: The 1994 Synod's *Instrumentum Laboris*," in *RfR*, 54 (1995), 180. Before the conclusion of the 8th Ordinary General Assembly of the Synod of Bishops, the Synod Fathers were invited to make suggestions on a topic to be treated at the next general assembly. In making their suggestions, the bishops were asked to keep in mind the following general criteria: (1) that the topic have a universal character, that is, one whose application concerns the whole Church; (2) that the topic have a contemporary character and a certain urgency, that is, the capability to stir movement in the Church towards growth; (3) that the topic have a pastoral focus and application as well as a firm doctrinal basis; and (4) that treatment of the topic be feasible, in other words, that it have the potential actually to be accomplished. The general consultation process revealed a remarkable convergence of ideas, indicating a preference for the topic on the consecrated life. See P.J. SCHOTTE, "The Consecrated Life in Church and World," in *RfR*, 53 (1994), 35-36. Schotte provides the following list of reasons for choosing consecrated life as the synodal topic: 1) The necessity to reaffirm the true nature and significance of consecrated life in the Church and in the world today; 2) The flourishing of vocations in some parts of the world and the crisis of vocations in others, which calls for a thorough examination of consecrated life; 3) Need to review the renewal process proposed by Vatican II, especially on the challenges which have come with it; 4) Need for further guidelines on collaboration between bishops and religious; 5) Evaluation and proper guidance on the emerging new forms of consecrated life; 6) Need to evaluate certain questionable models of community life adapted by some religious institutes in some countries; 7) Clarity on the prophetic meaning of consecrated life amidst the circumstances of the postmodern society characterized by secularization, cultural crisis and the decline in moral values; 8) More clarity on the prophetic character of consecrated life within the context of the modern human society and culture; 9) The concern of religious congregations as well as bishops, to seek the proper pastoral approach in situations where institutes have abandoned their apostolic works for other works. See *ibid.*, 36-37.

¹¹⁰ SYNOD OF BISHOPS, THE 9TH GENERAL ORDINARY ASSEMBLY, *De vita consecrata deque eius munere in Ecclesia et in mundo: lineamenta*, Libreria editrice Vaticana, 1992, English translation in *Origins*, 22 (1992-1993), 433, 435-454.

¹¹¹ Critics of the *Lineamenta* saw it as being too judgmental on the failures of consecrated life during the

contributed to a superior quality of the *Instrumentum laboris* in comparison with the *Lineamenta*.

The *Instrumentum laboris* is divided into six parts, namely the introduction, four chapters and the conclusion. The introduction begins by referring to the celebration of the synod on the consecrated life as a grace-filled moment for the entire people of God: a time that the entire Church was called upon to listen to the needs and desires of consecrated life and to discern how best it can respond with its resources of spirituality and charism, to the needs and expectations of the contemporary world (no. 1). The document acknowledges with gratitude the active participation of the entire Church in the preparation of the Synod, reflected in the many initiatives of reflection, prayer and study, the quality and quantity of official responses from bishops from all over the world and the interest shown by consecrated persons themselves seen in the responses sent through their superiors.¹¹² It continues by appreciating the wide variety and different forms of consecrated life. It then responds to the question concerning the ambiguity of the meaning and limits of the term “consecrated life” by specifying its various forms and their distinguishing elements. Lastly, it presents the plan of the document (nos. 2-7).

The first chapter, which is divided into four parts, treats the topic of consecrated life today. Part one presents the theological, spiritual and pastoral reality of consecrated life. It recognizes the diverse forms of consecrated life which are incarnated in persons, spiritualities and apostolates. It describes consecrated life as an authentic sign of eschatological and evangelical witness in the world and a reality which is shared with even non-Catholic ecclesial

period of renewal and adaptation. Secondly, the document failed to present the essential elements of consecrated life as a guide for all those involved in the consultation. Lastly, it advocated for total submission to bishops instead of promoting dialogue and cooperation. See McDERMOTT, “The Fruits of Consultation,” 180-189.

¹¹² Sean Fagan explains that the *Instrumentum laboris* expressed the fruit of the input from consecrated persons themselves as people who are actually living the life. The material for discussion presented in the *Instrumentum laboris* closely reflected the issues that consecrated persons had proposed to be discussed at the Synod. It was a Synod for religious by the religious. See S. FAGAN, “Preparing for the Synod: The *Instrumentum laboris*,” in *RfR*, 33 (1994), 259.

communities. Part two recognizes the negative impact of the rapid social and technological changes on consecrated life, its identity and mission in the world. Part three presents the unique challenges facing consecrated life as a result of diverse cultural and geographical realities in different regions in the world. These challenges call for spiritual renewal in the light of the gospel and discerning new ways of apostolic endeavours. Part four presents the various forms of consecrated life and their unique challenges. The document recognizes the presence and significance of new forms of evangelical communities and the possibilities of discerning new forms of consecrated life in the Church (nos. 8-40).

The second chapter of the document treats the topic of consecrated life in the perspective of the mystery of Christ and of the Church, in the context of the ecclesiology of communion. It begins by stating that consecrated persons witness to ecclesial communion through their diverse founding charisms, which, even though translate into varied forms of community life and apostolates, all fulfill the one mission (nos. 41-43). It further explains that consecrated life, divinely initiated and rooted in baptism (nos. 44- 49), is a call to total surrender, commitment and perseverance in imitation of Christ (nos. 50-54).

The third chapter, which continues with the theme of communion, situates consecrated life in the context of ecclesial communion. Consecrated persons, being part of the ecclesial communion, are called upon to foster this communion by building authentic relations through communication and collaboration among themselves, with the hierarchy and the laity. The document emphasizes the positive results of dialogue, mutual relations, collaboration, and cooperation. The bishops are reminded of their grave responsibility to preserve consecrated life, and coordinate apostolic endeavours of religious, mindful of the needs of the particular Church in the context of the organic communion. They are also to uphold the autonomy of the religious

institutes, motivated by apostolic spirit and the common good (nos. 55-84).

The fourth chapter of the document discusses consecrated life in the Church's mission in view of the challenges and difficulties facing it and discernment of new ways of responding to the new realities. In view of the present day challenges, consecrated persons are invited to greater spiritual vigour, a renewed apostolic vitality and greater commitment to appropriate formation and to vocation promotion. It stresses careful selection of candidates and formation which prepares candidates for the circumstances of the present day (nos. 56-89).

The document concludes with an invitation to all consecrated persons to fidelity to Christ and to his Gospel, to the Church and her mission in the world, to their vocation and charism and to generosity in responding to the needs of humanity of our times.

The post-synodal apostolic exhortation *Vita consecrata*, does not present any significant difference in its take on the question of formation in general and ongoing formation in particular when compared with the *Instrumentum laboris*. Nevertheless, the *Instrumentum laboris*, as a midway document between the *Lineamenta*, and *Vita consecrata*, presents the “inside story” of what occurred during the series of discussions which were finally synthesized as propositions that guided the Holy Father in producing the post-synodal exhortation.

In view of ongoing formation, *Instrumentum laboris* recommends a *Ratio institutionis* for each institute, that is, a formation program which offers a more intense intellectual, philosophical and cultural formation in view of effective evangelization work. Formation is to pay attention to the background of the candidate, with emphasis on his or her maturity, present day circumstances and the needs of the Church. Such formation must offer a strong pedagogy of faith, founded on the word of God. It should be integral, progressive and adapted to the different stages of religious life (no. 90). These recommendations on ongoing formation appear in a brief form in the

Instrumentum laboris and the subsequent post-synodal apostolic exhortation accords them even more attention.¹¹³

2.3.3. Post-Synodal Apostolic Exhortation *Vita consecrata*, 1996

The Post-Synodal apostolic exhortation *Vita consecrata*, signed on March 26, 1996 by John Paul II was the final stage of the process of the 9th General Assembly of the Synod of Bishops.¹¹⁴ This document, as McDermott remarks, is the fruit of the consultative process which followed the Synod's *Lineamenta*. It included the contributions of the bishops and of other participants from around the world and those of the actual synod assembly.¹¹⁵ *Vita consecrata*, as

¹¹³ While the *Instrumentum laboris* speaks of ongoing formation as "enduring dynamism" (no. 92), *Vita consecrata* refers to it as "a constant search for faithfulness" (*VC*, no. 70, in *AAS*, 88 [1996], 444-446, in *L'Osservatore Romano*, English ed., April 3, 1996, supplement, 13). The *Instrumentum laboris* advocates for continuous formation in various phases of life of consecrated persons but does not specify these phases. *Vita consecrata* identifies these phases and explains their necessity and specifications in details (*VC*, no. 71, in *AAS*, 88 [1996], 446-447, in *L'Osservatore romano*, English ed., April 3, 1996, supplement, 13). Both the *Instrumentum laboris* and *Vita consecrata* recognize formation of the formators as a priority in formation work. While the *Instrumentum laboris* speaks only of support and formation of formators (no. 92), *Vita consecrata* provides details on the required qualities, the manner of training, the type of institutions, and the kind of environment formation personnel are to be trained in (*VC*, no. 66, in *AAS*, 88 [1996] 441-442, in *L'Osservatore Romano*, English ed., April 3, 1996, supplement, 12).

¹¹⁴ The Synod process can be divided into four great moments: the *Lineamenta*, the *Instrumentum laboris*, the Synodal assembly and the post-synodal document. After the Holy Father's choice of topic, a scheduled meeting comprising the council of the general secretariat, the secretary of the Congregation for Institutes of Consecrated Life and Societies of Apostolic Life and representatives from the various groups associated with consecrated life took place. The observations resulting from this meeting were further discussed and developed in subsequent council meetings, and with the help of theologians, the text of the *Lineamenta* was drafted and studied, before definitive text was submitted to the Holy Father who accepted the topic. After further consultations, the council of the synod released the *Instrumentum laboris* for the Synod on 20 June 1994. After the discussions on the synodal floor, 55 propositions were presented to the Pope who after studying them, finally issued the post-synodal apostolic exhortation *Vita consecrata*, on March 26, 1996. See SCHOTTE, "The Consecrated Life in Church and World," 35. The Pope, on the opening of the 1994 Synod of Bishops, stated that the synod on consecrated life was to be the *kairos* moment for the integration of the conciliar texts. See JOHN PAUL II, "The Start of the 1994 Synod of Bishops," in *Origins*, 24 (1994-1995), 307). Jesús Castellano concurs when he remarks that *Vita consecrata*, "mirrors the continuity of the practical guidelines of *Perfectae caritatis*" (J. CASTELLANO, "*Lumen gentium* - *Perfectae caritatis* - *Vita consecrata*: Dynamic Accord and Innovation in Three Texts of the Magisterium on Consecrated Life," in *Consecrated Life*, vol. 22, no. 1 [2000], 164).

¹¹⁵ R. McDERMOTT, "*Vita consecrata*: Vocation for the Third Millennium," in *RfR*, 55 (1996), 454-455.

some authors point out, completes the trilogy of the apostolic exhortations¹¹⁶ on the distinctive features of the states of life in Church.¹¹⁷ It was also referred to as the Synod which provoked the greatest response and interest from the entire Church and the Holy Father.¹¹⁸

The document is divided into five parts, namely: introduction (nos.1-13) and three chapters entitled, respectively *Confessio Trinitatis* (nos. 14-70), *Signum fraternitas* (nos. 41-71), *Servitium caritatis* (nos. 72-103) and a conclusion (nos. 104-112). The exhortation presents a comprehensive pastoral and positive overview and a solid theological description of life consecrated by the profession of evangelical counsels.

The introduction to the exhortation describes consecrated life by its Christological dimension, appreciates the gift of consecrated life to the Church, explains the purpose of the exhortation as that of gathering the fruits of the synodal sessions which extensively studied and discussed the significance and contribution of consecrated life to the Church's mission. The document recognizes the five forms of consecrated life and their spiritual and apostolic significance in the Church. The exhortation encourages all members of the Christian faithful to

¹¹⁶ "The apostolic exhortations which have their origin in the Synod of bishops have the addition of the word 'Post-Synodal.' As papal documents, they are the fruits of the gathering of bishops of the entire Church together with their head, the successor of Peter, where they discuss common pastoral problems, on matters of morals and faith and strengthen the ecclesiastical unity in the care of the universal Church" (SCHOTTE, "The Consecrated Life in Church and World," 35). See also E. McDONOUGH, "The Synod on Consecrated Life," in *RfR*, 52 (1993), 620. For an extensive study on post-synodal apostolic exhortations of John Paul II, see M. MILLER (ed.), *The Post-Synodal Exhortations of John Paul II*, Huntington, IN, Our Sunday Visitor, 1998.

¹¹⁷ See JOHN PAUL II, Post-synodal Apostolic Exhortation on the Formation of Priests in the Circumstances of the Present Day *Pastores dabo vobis*, March 25, 1992, in *AAS*, 84 (1992), 657-803, English translation in *Origins*, 21 (1992), 717, 719-759. The Exhortation, addressed to both clergy and the lay faithful of the Catholic Church, concerns the formation of priests in the present day circumstances. On the laity, see ID., Post-synodal Apostolic Exhortation on the Vocation and the Mission of the Lay Faithful in the Church and in the World *Christifideles laici*, December 30, 1988, in *AAS*, 81 (1989), 393-521, English translation *The Lay Members of Christ's Faithful People*, Boston, St. Paul Books and Media, 1989. With this Exhortation, the Holy Father intended to urge and promote a deeper awareness among all the faithful of the gift and responsibility they share, both as a group and as individuals, in the communion and mission of the Church.

¹¹⁸ Michael Miller remarks that "[...] the Holy Father followed all the events closely. He made a point of being at the meetings. Moreover, during and after the Synod, he delivered a number of systematic talks on consecrated life" (MILLER [ed.], *The Post-Synodal Exhortations of John Paul II*, 617).

appreciate the gift of consecrated life and it urges consecrated persons to remain faithful in the midst of the challenges they are facing in today's world.

The first chapter of the exhortation, entitled *Confessio Trinitatis* (nos.14-40), demonstrates the link between consecrated life and the mystery of Christ and of the Trinity. The Holy Father explains that by the profession and the living of the evangelical counsels, consecrated persons imitate Christ and witness to his love for the world by fidelity to their charisms and missionary initiatives. The Holy Father esteems the state of consecrated life as a distinct and a special path to holiness, a perfection of the baptismal commitment and a powerful witness to the eschatological reality. He urges consecrated persons to deepen their holiness by what he calls “the spiritual combat,” that is, cultivation of spiritual vitality through fidelity to prayer, Eucharist and commitment to conversion of the soul.

The second chapter, *Signum fraternitatis* (nos. 41-71) treats consecrated life in the context of ecclesial communion. Consecrated life manifests fraternal communion in imitation of Christ's life and in the model of the Trinitarian unity. This communion finds its expression in fraternal life in common, fidelity to spiritual life and to the shared charism and apostolates. He urges the superiors of the various individual institutes to foster this communion by means of inclusive participation of members in matters affecting all. Communion is to extend to the entire ecclesial community, demonstrated by greater cooperation and collaboration with the hierarchy at all levels, in areas of formation, pastoral planning and apostolic initiatives so that witness to ecclesial communion is truly upheld.

Likewise, formation programs for candidates should aim at achieving the integration of human, communal, apostolic, cultural and professional dimensions of the person. The Holy Father recognizes the significance of the contribution of consecrated women in the Church. He

recommends further exploration of ways of greater involvement and participation in the life and mission of the Church and appropriate professional, theological and pastoral formation adapted to modern needs. He concludes the chapter by showing appreciation for the gift and contribution of all forms of consecrated life within the Church, with a note of openness to the new forms of consecrated life.

The third chapter, *Servitium caritatis* (nos. 72-103) refers to life consecrated by profession of the evangelical counsels as a sign of God's love to the world. Through their profession of the evangelical counsels, community life and apostolic works, consecrated persons offer a prophetic witness which fosters the holiness of the Church. Consecrated persons continue the mission of Christ through their personal life, their charisms and in apostolic works in which they engage in evangelization, ecumenical and interreligious dialogue, inculturation, the preferential option for the poor, the promotion of justice and in the field of education.

The Holy Father concludes by affirming the invaluable role and significance of consecrated persons in the Church. With a note of gratitude to God for the gift of consecrated life in the Church, he exhorts consecrated persons to remain faithful to their vocation and to look into the future with hope. He urges all people of good will to appreciate and support consecrated life. He encourages all to nurture and foster vocation. He ends with a prayer to the Trinity and an invocation to the Virgin Mary for all consecrated persons.

Vita consecrata presents ongoing formation as a means at the disposal of consecrated persons to discover their own identity as, precisely, consecrated persons called to fulfill the mission of Christ in the world.¹¹⁹ The entire synodal process was to discover ways in which a more radically visible witness of the identity and significance of consecrated life could be

¹¹⁹ GIALLANZA, "Continuing Formation," 469.

reclaimed in the Church. *Vita consecrata*, therefore, presents formation as a lifelong search for faithfulness and preparation for effective engagement with the world (nos. 69-70).

The document does not separate the two aspects of post-novitiate formation that is, formation during the period of temporary vows and that which continues after perpetual profession. It simply refers to it as ongoing formation. It begins by reaffirming that ongoing formation is an intrinsic requirement for all consecrated persons. This is a reminder that all consecrated persons are in formation throughout their lives as a means of a renewed sense of fidelity and of a refreshed approach to every dimension of consecrated life.¹²⁰ As J. Giallanza points out, “formation in religious life is, of its nature, a progressive thing that persists to the very end of one’s life.”¹²¹ In summary, the exhortation recognizes formation as a lifelong process. It recommends a *ratio institutionis* for every institute which specifies a precise and systematic description of its plan for continuing formation. It highlights the different phases of consecrated life which requires formation proper to them. It specifies the various dimensions of ongoing formation as: human and fraternal dimensions, apostolic dimension, the cultural and professional dimensions. These are all to be harmonized in the charism of the institute aimed at unity of life and lifelong faithfulness to religious consecration.¹²²

¹²⁰ Ibid., 471.

¹²¹ Ibid., 470.

¹²² For a more extensive study on the Synod, see J. SWEENEY, “Consecrated Life: The Synod and Theology,” in *RLR*, 34 (1995), 75-85; E. STARKEN, “Reflections on the Synod I,” in *RLR*, 34 (1995), 86-90; E. STARKEN et al., “Religious Address the Synod,” in *RLR*, 33 (1994), 334-361; E. ROSANA, “The Synod’s Discussion of the Consecrated Life of Women,” in *Consecrated Life*, vol. 20, no. 2 (1999), 191-208; C. POZO, “The Theology of the Consecrated Life at the Recent Synod of Bishops,” in *Consecrated Life*, vol. 20, no. 2 (1999), 122-131; MCDERMOTT, “The Fruits of Consultation,” 180-191; P.C. GIORDANO, “The Perspectives of Consecrated Life in the *Instrumentum laboris*,” in *Consecrated Life*, vol. 20, no. 1 (1999), 27-41; S. FAGAN, “Preparing for the Synod: The *Instrumentum laboris*,” in *RfR*, 33 (1994), 258-263; G. GHIRLANDA, “*L’instrumentum laboris* per il Sinodo sulla vita consacrata,” in *Periodica*, 83 (1999), 437-446; M. LETOURNEAU, “Consecrated Life and Its Role in the Church and in the World: An Overview of Responses to the *Lineamenta*,” in *UISG Bulletin*, no. 94 (1994), 9-18; B.G. HUME, “*Relatio ante disceptationem* Part II: Multifarious Gift of Consecrated Life,” in *Consecrated Life*, vol. 20, no. 2 (1999), 66-73; ID., “*Relatio ante disceptationem* Part III: Challenges to Consecrated Life,” in *Consecrated Life*, vol.

2.3.4. Instruction on Inter-Institute Collaboration for Formation *Attenta alla condizioni*, 1998

The Instruction on Inter-Institute Collaboration for Formation issued on December 8, 1998 had as its recipients the institutes involved in apostolic works (no. 2). It came as a follow-up of the recommendations made by the earlier documents on the need for inter-institute collaboration in formation.¹²³ The document is divided into four parts with an introduction and a conclusion.

The introduction presents the purpose of the document as “to reflect on the formation of members of religious institutes in today's circumstances and to propose some directives which guarantee a formation which is complete, solid, and consistent with the journey of the Church” (no. 1). The document stresses the fact that it is meant to be a response to the challenges in formation arising from specific pedagogical needs due to fewer candidates, lack of formators and a small number of qualified teaching personnel (no. 3).

The first part of the instruction deals with the fundamental principles and practical directives with regard to inter-institute initiatives on formation. The instruction reaffirms that formation is an inalienable right and duty of each institute and can never be substituted by collaborative initiatives. It explains that in such initiatives formation is to be integral, that is, fusing together the aspects which are proper to each institute and those which are common to all. It goes on to state that the Church on her part is to ensure that the autonomy, patrimony and

20, no. 2 (1999), 74-85; ID., “Setting the Scene for the Synod,” in *RLR*, 33 (1994), 326-333; V. DE PAOLIS, “The Identity of the Consecrated Life from Vatican II to the Post-Synodal Apostolic Exhortation *Vita consecrata*,” in *Consecrated Life*, vol. 22, no. 2 (2000), 90-122; J. CHITTISTER, “Reflections on the Synod I,” in *RLR*, 34 (1995), 91-94; A. BANDERA, “*Vita consecrata*: Il numero iniziale,” in *Vita consacrata*, 33 (1997), 244-264.

¹²³ See *PI*, nos. 98-100, in *AAS*, 82 (1990), 527-527, in *Origins*, 19 (1989-1990), 696-697; *ES II*, no. 37, in *AAS*, 58 (1966), 781, in *FLANNERY I*, 632.

formation which is configured to the specific purpose of the institute is upheld and that the spiritual conditions and the juridic instruments which guarantee its fruitfulness, development and harmony in the ecclesial communion, are assured (nos. 6-8).

In such collaborative initiatives, the document points out that the internal authorities of religious institutes are to ensure that the role of a formative community and those of centers for collaboration are clearly distinguished. For the erection of such centers, the instruction directs that written consent of the local Ordinary is required, courses taught are to conform to the Magisterium of the Church and the professors and teachers are to be chosen for their competence, pedagogical ability and capability to work as a team (nos. 9-12).

The second part of the document deals with collaboration during the various phases of formation. It recommends collaborative initiatives during the period of temporary vows and the ongoing formation, including formation of candidates for orders. In such initiatives, the document cautions, the purpose and requirements of each stage of formation are to be respected and the training in such centers of collaboration is not to replace the formation programme of individual institutes. In designing such programmes, the courses offered are to supplement and be harmonized with formation programmes of institutes. Each institute is to retain its autonomy, as there no such a thing as “inter-institute formation” (nos. 13-18).

With regard to formation during the period of temporary vows, the document acknowledges the significance of collaborative initiatives in formation in deepening of the spiritual, doctrinal, and pastoral formation, in fostering the Christian and human maturity, and in offering appropriate courses in view of preparation for perpetual profession. It recommends that such initiatives emphasize deepened knowledge of the ecclesiology promoted by the Second Vatican Council, aimed at ecclesial orientation in areas of evangelization, pastoral collaboration

and inculturation. Such initiatives, however, should be mindful of the characteristics and circumstances of life of the professed. Those in charge of formation are to be involved in structuring, executing and evaluating the programmes in such centers (no. 17).

In part three, the document speaks of collaboration with regard to teaching religious sciences and philosophical and theological formation of the candidates for priesthood provided in centers erected for that purpose. The document recognizes the distinctions in the formation of lay religious and permanent deacons and that of religious who are candidates for priesthood. It directs that the specific requirements of each category must be respected. The document identifies institutes of religious sciences as centers for formation of lay religious and those of theological and philosophical formation for permanent deacons and religious who are candidates for priesthood. It distinguishes the roles, manner of erection and administration of these institutes.

The institutes of religious sciences are to offer a solid philosophical and theological foundation that prepares participants for evangelization work with sensitivity to the social and cultural human context and the principles of ecumenical and inter-religious dialogue, according to the signs of the times (cf. c. 821). They are erected by conferences of major superiors and approved by the Congregation for Consecrated Life and Societies of Apostolic Life. They are to be administered by a designated team accountable to the above mentioned Congregation.

The centers for philosophical/theological formation are to fulfill the following requirements: canonical erection, clearly defined statutes which specify the manner of administration, structure of programmes, type of courses offered, qualification and quality of professors and teachers, manner of admission of candidates, manner of evaluation and means of

coordinating the overall formation programme. Institutes are to ensure that training in these centers is harmonized with formation in the community (nos. 19-22).

The last part of the document addresses collaboration in the area of formation of the formators themselves. Given that each individual institute may not be self-sufficient in view of its resources for training of future formators, the instruction recommends inter-institute centers in which appropriate courses offering expertise in different areas of formation are made available. Such programmes, besides preparing the future formators for their work, are of great benefit to their own spiritual growth and continuing formation (nos. 23-26). In its conclusion, the document highlights the significance of closer collaboration among institutes in the work of formation so that each institute is assured of offering its members adequate formation (no. 27).

The Instruction on Inter-Institute Collaboration for Formation is a valuable resource for apostolic religious institutes in responding to pedagogical formation needs which arise from specific challenges of few candidates and inadequate formation personnel by means of collaborative initiatives. Throughout the document, there is emphasis on the respect of the proper character and nature of individual institutes in all collaborative initiatives in formation. As Eusebio Hernandez affirms, the document presents the possibility of collaborative endeavours in formation among religious institutes, though it cautions that such endeavours are not to jeopardize the charismatic identity of individual religious families.¹²⁴ The instruction emphasizes the benefits and necessity of collaborative ventures in formation while stressing that such ventures do not replace the obligation of institutes to form members. By calling on institutes to initiate joint ventures in formation work, the document promotes a spirit of sharing of gifts and resources between religious families, a sign of the communion nature of the Church. It serves as

¹²⁴ E.S. HERNANDEZ, "The Document on Inter-Institute Collaboration for Formation," in *Consecrated Life*, vol. 25, no. 1 (2005), 27.

an expression of one way religious institutes can fulfill their duties through collaboration and solidarity.

2.3.5. Instruction *Starting Afresh from Christ*, 2002

The instruction *Starting Afresh from Christ: A Renewed Commitment to Consecrated Life in the Third Millennium*, dated 19 May 2002 and published by the Congregation for Institutes of Consecrated Life and Societies of Apostolic Life, is the fruit of the Congregation's plenary session held in Rome between 25 and 28 September 2001. Mindful of the apostolic exhortation *Vita consecrata* of Pope John Paul II and his apostolic letter *Novo millennio ineunte*, the members of the plenary did not intend "to produce another doctrinal document" (no. 4). Their aim was "rather to help consecrated life enter into the great pastoral guidelines of the Holy Father with the contribution of his authority and of charismatic service to unity and to the universal mission of the Church" (no. 4).

The instruction is divided into five parts, an introduction and four chapters. The introduction (nos. 1-4), begins by highlighting the emerging difficulties and challenges consecrated persons are facing since Vatican II to the time of publication of *Vita consecrata*. It gives an opening note of hope to consecrated persons not to despair but to cast out into the deep (cf. Lk 5:4). The central message of the instruction is the invitation to consecrated persons to re-awaken the desire of intense evangelical radicality and renewed fidelity rooted in Christ, hence, the title, "starting afresh from Christ."

Chapter one, besides acknowledging the positive contribution of consecrated persons to the entire Church, also recognizes the challenges they are facing in areas of apostolates and formation due to diminishing numbers and very few or no vocations in some parts of the world,

which has led some religious to doubt the significance and identity of consecrated life. This scenario calls on religious families to explore greater collaboration and cooperation with the bishops and the entire Christian community in areas of formation and apostolate while remaining open to the Spirit for guidance towards new ways of witnessing (nos. 5-10).

Chapter two reflects on the challenges and difficulties consecrated persons are facing in living the life of evangelical counsels and the influence of the present day society which esteems values contrary to those of the Gospel, thus raising doubts, shared by numerous consecrated persons about the relevance and survival of their state of life. The instruction gives a message of hope and refers to the difficult times as a moment of new *kairos*, a time of grace. It calls on all individual consecrated persons, supported by their superiors, to deepen the living of their consecration with fidelity and charismatic creativity, as did many of their founders and foundresses.¹²⁵

On the subject of formation, the instruction recommends integral and lifelong formation which harmonizes all aspects of life in the context of community and of daily life experiences. It calls for a pedagogy which responds to concrete spiritual and cultural situations. It recommends a well-planned formation *ratio* and carefully chosen and trained formation personnel for all institutes. The instruction exhorts all members of the ecclesial community to promote vocations and stresses prudence by institutes in assessing the authenticity of vocation in aspirants to consecrated life. It urges collaboration between institutes of consecrated life and the hierarchy of

¹²⁵ See JOHN PAUL II, Message on the 8th World Day of Consecrated Life “Called to Faithfulness,” February 2, 2004, in *L’Osservatore Romano*, English ed., February 4, 2002, 1 and 11; ID., Message on the 11th World Day of Consecrated Life “Call to Radical Evangelical Fidelity,” February 2, 2007, in *L’Osservatore Romano*, English ed., February 7, 2007, 2-3; ID., Message on the 12th World Day of Consecrated Life “Follow Christ without Compromise,” February 2, 2008, in *L’Osservatore Romano*, English ed., February 6, 2008, 2 and 4.

the Church at all levels. It calls for more attention and care by the bishops to institutes of diocesan right, nuns and consecrated virgins (nos. 11-19).

Chapter three, which deals with the spiritual dimension of consecrated life employs the theological dimensions of consecrated life as a point of departure in “starting afresh from Christ.” This calls on consecrated persons to a renewed commitment to spiritual rebirth, to return to sources through fidelity to the celebration of Eucharist and meditation on the Word of God.¹²⁶ Being rooted in Christ, consecrated persons imitate Christ in living the evangelical counsels as a means of fraternal bonding in the form of communitarian life and witness of charity in mission. This compels them to serve Christ in others and to bring his mercy to them (nos. 20-32).¹²⁷

In chapter four, the instruction urges consecrated persons to reclaim their role and identity in living the evangelical counsels with fidelity and by involvement in evangelization work. Such a re-dedication, motivated by charity and apostolic fervor, is a powerful prophetic witness of God’s love. This calls for re-commitment to bringing the face of Christ to the world in areas such as justice and peace, ecumenical dialogue and the ecological crisis, all which threaten human dignity and survival. The instruction ends by urging institutes to design formation which orientates toward radical evangelical witness especially for the young consecrated persons to whom the survival of charisms is entrusted (nos. 33-46).

On ongoing formation, the document acknowledges the difficulties in this area as a result of the challenges facing consecrated persons today because of changes both in consecrated life itself and in society. With a strong tone of hope the instruction advocates for formation which will orientate new members towards a deep understanding of the spiritual and theological

¹²⁶ See C.M. MANGAN, “The Spirituality of CICLSAL’s ‘Starting Afresh,’” in *R/R*, 62 (2003), 18.

¹²⁷ *Ibid.*, 19.

meaning of their consecration. Those in formation are to be helped to understand and appreciate their consecration as following of Christ and fulfilling his mission in the world so that they are able to witness to it with fidelity. For consecrated life to preserve its identity and significance in the face of all the challenges, institutes of consecrated life should recommit themselves to give solid formation to their younger members who in turn will persevere in their religious families. Older members too are not to despair and give up in all aspects of their lives, including formation.

The document, *Starting Afresh from Christ* portrays the solicitude and concern of the Church towards consecrated persons. It is punctuated with a strong message of reassurance and hope. It reaffirms the central role of consecrated life in the Church despite the challenges and difficulties consecrated persons are facing. It is a call to consecrated persons to a renewed fidelity to their evangelical witness and a recommitment to their identity and mission by means of spiritual rebirth centered on Christ. The document serves as a strong reaffirmation by the Church on the invaluable contribution of consecrated life in her life and mission. *Starting Afresh from Christ* as Charles Mangan remarks, “is a restatement at the beginning of this millennium of the cherished principles of consecrated life.”¹²⁸

Conclusion

This chapter has attempted to bring out a deeper understanding of the norms on formation of religious by tracing their sources and their evolution, up to the promulgation as universal laws. Besides the analysis of the norms in the Code of Canon Law, it has also discussed other norms which regulate the period of temporary vows and the pre-conciliar documents which touch on formation.

¹²⁸ Ibid., 25.

Formation of religious, as *PI*, no.1 states, has remained a “constant concern to the Church.” This has been motivated in the present times more than ever before by the continuous and rapid changes in the human society, the needs of the Church and the emerging realities of religious life itself. The Church therefore requires that religious institutes take very seriously the duty of formation of their members after first profession and throughout their whole life. The individual institutes through their internal authority are to ensure that members are accorded the time, opportunity and resources for formation. Formation of members remains an obligation for all institutes which is not to be substituted by any other formation initiatives outside the institute. Studies can be undertaken in centres outside the institute but such is not to replace or contradict the formation offered by individual institutes to their candidates.

With regard to formation during the period of temporary vows, the Church requires all institutes to have a well-structured formation programme which specifies the ends, duration, content, manner of evaluation, and the pedagogy of this stage of formation in accord with the institute’s proper law. It also requires members duly designated to the office of the director of members in temporary vows and other supportive structures which contribute to the effective formation of members, like presence of formative community and apostolates which do not impede formation.

The period of temporary vows is a time of testing, of deepening what was learnt during the novitiate and of further discernment for both the candidate and the institute on the suitability for permanent commitment. It is, therefore, probationary and formative in nature. This implies that all the formative experiences and training are to be oriented toward achieving the unity of life.

In sum, the 1983 Code and the post-conciliar documents highlight the main characteristics of formation during the period of temporary vows. Firstly, this formation is to proceed gradually and naturally in stages, taking into account the capacity and pace of development of the individual candidate. Secondly, formation during the period of temporary vows is to be integral, that is, harmoniously blending the doctrinal, apostolic, professional and spiritual aspects of religious life. This is to aim at the unity of life which is the goal of formation. Thirdly, this stage of formation is to be configured to the nature, character and purpose of individual institutes, keeping in mind the needs of the Church. Fourthly, it is to be adequate. The overall structure of post-novitiate formation is to orientate the candidate not only to live the life of the institute more fully and to fulfill its mission more effectively in the present, but also to foresee the needs of the institute in the future. Fifthly, when it is appropriate, formation during the period of temporary vows is to safeguard acquiring academic credentials for the purpose of professional qualification and apostolic competency of religious.

Numerous post-conciliar documents have expressed the solicitude of the Church towards religious life in general and formation in particular. The Church is constantly discerning new ways to meet the ever-emerging challenges facing formation. She affirms in these documents that formation is an ecclesial task, not a job left only to religious institutes. Each of the post-conciliar documents discussed in this chapter demonstrate the response of the Church to specific challenges facing formation of religious. They also demonstrate that the provisions of the Code require supplementary directives which address the concern at hand.

CHAPTER THREE: FORMATION DURING THE PERIOD OF TEMPORARY VOWS IN THE INSTITUTE OF THE BLESSED VIRGIN MARY (LORETO SISTERS)

Introduction

Universal law requires each institute to determine in its proper law the principles which guide the fundamental aspects of the life of the members, including formation of members. The fundamental law commonly referred to as the constitutions is to contain the general principles which guide the life of the members (c. 587). Other codes are to provide guidelines and interpretation for the application of the constitutions (c. 587 § 2).

The general norms on formation in the Institute of the Blessed Virgin Mary (Loreto Sisters) are contained in the *Constitutions*¹ and the specifications of their application are laid out in the *Formation Handbook*² and other related codes like the Institute's *Study Policy*,³ the *Inter-Cultural Handbook*⁴ and the *Privacy Policy*,⁵ as well as in the directives from general chapters which have normative force.⁶

¹ See IBVM, *Constitutions*, [1-202]; 5.1-5.44, Strasbourg, Éditions du Signe, 2010 (= IBVM *Constitutions*). These revised Constitutions of the reunited Institute of the Blessed Virgin Mary incorporated in accordance with the wishes of both former branches, the original Ignatian texts and the “feminized” Ignatian model of constitutions in the context of living religious life in the 21st century were published as two volumes in one book. See Foreword Note by the Institute leader, in *ibid.*, 7. Citation of individual constitutions conforms to the format used in the book. In Volume One, the numbering is with parentheses while in Volume Two, the numbers have decimal points. Whenever the book is cited with no formatting of figures, page numbers are implied.

² See IBVM, *Formation Handbook*, Rome, IBVM, 2011.

³ See IBVM, *Institute Policy for Studies and Life -Long Learning*, Rome, IBVM, 2011.

⁴ See IBVM, *Inter-Cultural Handbook*, Rome, IBVM, 2011.

⁵ See IBVM, *Privacy Policy*, in *Formation Handbook*, 90.

⁶ See for instance, the mandate of General Chapter (= GC), 98 to review the Constitutions and the commitment of the Institute to write a supplementary document based on the Constitutions of the two branches which would accompany and update the provisions of the Institute's foundational Ignatian Constitutions. A Central

This chapter treats the topic of formation during the period of temporary vows in the Institute of the Blessed Virgin Mary. After an introduction on the historical background of the Institute, it presents its general structure. Then, the trends in formation since Vatican II are outlined, followed by a discussion of the overall structure of formation in the Institute in terms of the aims and stages of formation. Lastly, formation specifically during the period of temporary vows in view of its aim, components, the role of those in charge, renewal of vows and readiness for perpetual profession will be considered. This is to help gain insight into the current practice of the Institute with regard to the formation of temporarily professed members and to identify discrepancies, if any, between the norms on formation in the Institute and the provisions of the universal law.

3.1. The Religious Institute of the Blessed Virgin Mary (Loreto Sisters)

This section presents the Institute of the Blessed Virgin Mary. It traces its growth and development from the period of its foundation to the present. This is to help shed light on the historical shaping of the Institute and on the formation of its members.

3.1.1. The Foundation of the Institute of the Blessed Virgin Mary

The Institute of the Blessed Virgin Mary, commonly known as Loreto Sisters, was founded in the 17th century by an English woman known as Mary Ward. The vision of Mary Ward was to found an apostolic religious institute of women whose manner of life and work are

Committee for Initial Formation was formed in 2004. This committee was charged with the task of revising the formation programmes for the various stages of initial formation included in the 1997 Handbook. The outcome of the revision was an updated programme for the stages of vocation promotion, candidacy, novitiate and temporary profession. Each stage of formation had its separate Handbook until they were put together as one in Handbook in 2011. See General Report, 1998-2006 Booklet, 12, in Canadian Provincial Archives, Toronto (= CPAT), Box 88. See also the initiative of the General Leadership in collaboration with provincial leaders to draw up the Studies Policy to provide guidelines for studies and on-going education of members. See *ibid.*, 25.

modeled on the Jesuit Constitutions. She envisioned the members to be apostolic women living outside the cloister, free from choir and religious dress obligation, devoted to works of the defense and propagation of the Catholic faith by means of education, especially for girls, and aimed at the salvation of souls and greater honour and glory to God.⁷

Mary Ward was born in Yorkshire in England, in 1585, to Marmaduke Ward and Ursula Wright, both of whom were devout Catholics and wealthy landowners. She lived in the time of religious, social and political upheaval. After the establishment of the Church of England in which Henry VIII declared himself the head, all subjects were expected to pay allegiance to the King and the Church of England was regarded as the only official Church. By the Act of Succession of 1534, any subject who did not observe the rule of allegiance incurred either the penalty of imprisonment or of death.⁸ Furthermore, anti-Catholic legislation was enacted during the reign of Queen Elizabeth in the form of the Law of Supremacy and the Law of Uniformity. The Law of Supremacy abolished the Pope's jurisdiction within the Queen's domain and the Law of Uniformity declared the Anglican Church as the only official state Church to which every subject was to ascribe by an oath.⁹ Death penalty was imposed on those who defended the Pope or refused to take the oath of allegiance to the king. The consequences of these laws spelt severe religious persecutions for Catholics in England. Catholic institutions and Churches were

⁷ Mary Ward drew three successive plans in which she tried to articulate the vision of her Institute as one of apostolic service. The first plan (*Schola Beatae Mariae*, 1612), the second (*Ratio Instituti*, 1615) and, the third plan (*Institutum I*, 1620). All three are described in M.E ORCHARD (ed.), *Till God Will: Mary Ward Through Her Writings*, London, Darton, Longman & Todd, 1985, 34-38, 43-46, 64-65. See also WRIGHT, *Mary Ward's Institute*, 17-24; I. WETTER, "Mary Ward's Apostolic Vocation," in *The Way Supplement*, 17 (1972), 82-86; M.C.E. CHAMBERS, *The Life of Mary Ward*, vol. 1, edited by H.J. COLERIDGE, London, Burns and Oates, 1882, 375-385; W. BRODERICK, "One Mission: Many Ministries," in *The Way Supplement*, 53 (1985), 35-37.

⁸ See H. CHADWICK, *St. Omer to Stonyhurst: A History of Two Centuries*, London, Burns and Oates, 1962, 73.

⁹ See J.J. CAMERON, *A Dangerous Innovator: Mary Ward (1585-1645)*, Sydney, St Paul's Publications, 2000, 6-7; C.E. BURKE, *Freedom, Justice and Sincerity: Reflections and Spirituality of Mary Ward*, Hindsma, ATF Press, 2009, 22.

suppressed and there was constant spying on Catholics. Many Catholics gave up their faith to escape persecution, imprisonment or martyrdom.¹⁰

Amidst all the persecutions, a minority of Catholics remained faithful to their religion and willingly suffered for it. In order to keep and preserve the faith, Catholic practices went underground with priests living in hiding in Catholic homes. Catholic families had to move constantly from their homes to other places in order to escape being spied upon by state authorities and possible imprisonment. Often, parents would entrust their children to relatives residing in places which were less dangerous. Occasionally, when the persecutions became too much to bear, some Catholics would engage in resistance, for instance, the Gunpowder Plot of 1603.¹¹ Despite the fierce persecutions of Catholics, the faith thrived through the Catholic recusants who preserved it by means of the underground liturgies and administration of the sacraments by priests in hiding, mostly Jesuits, in homes of Catholic families.¹² There was however, a general deterioration of the Catholic faith as a result of very few priests or catechists to teach the Catholic doctrine and faith. Likewise, with the closure of all convents and schools run by Catholic nuns, there was lack of education especially for women of Catholic families who mainly attended these schools.¹³

Mary Ward was fortunate as her family was one of the devout Catholics. She had a good

¹⁰ See CAMERON, *A Dangerous Innovator*, 4; BURKE, *Freedom, Justice and Sincerity*, 17.

¹¹ See BURKE, *Freedom, Justice and Sincerity*, 22. For a detailed discussion of the Gunpowder plot, see H. PETERS, *Mary Ward; ihre Persönlichkeit und ihr Institut*, Innsbruck-Wien, Tyrolia, 1991, English translation by H. BUTTERWORTH, *Mary Ward: A World in Contemplation*, Leominster, Gracewing, 1994, 55-67; J. MOREY (ed.), *The Condition of Catholics under James I: Father Gerard's Narrative of the Gunpowder Plot*, London, Longman, Green & Co., 1981.

¹² See CAMERON, *A Dangerous Innovator*, 4-18. See also J.C.H. AVELING, *Catholic Recusancy in York 1558-1781*, London, CRS, 1970; ID., *The Handle and the Axe: The Catholic Recusants in England from Reformation to Emancipation*, London, Blond and Briggs, 1976; J. COVER, *Love, the Driving Force. Mary Ward's Spirituality: Its Significance for Moral Theology*, Milwaukee, WI, Marquette University Press, 1997, 25-45.

¹³ See D. ROFE, "Mary Ward: Journey into Freedom," in *The Way Supplement*, 53 (1985), 4.

religious background and training in the faith, having been educated at home, as was the practice of rich families in England at that time. It is this background, together with her own experience of the status of the Catholic Church in her country, which later shaped her vocation and vision of her Institute.¹⁴

The anti-Catholic laws had eliminated all monasteries and convents in England, so Mary Ward had no contact with nuns as a young girl. However, she had already discovered within her a desire to offer herself totally to God and to His service, and to do something about the situation of the Catholic faith and education for girls in England.¹⁵ To the disappointment of her parents and her confessor, Mary Ward turned down three marriage proposals.¹⁶

At the age of fifteen, she felt the desire to respond to a call to religious life. Since there were no convents in England, she had to cross the channel to Flanders to join the monastery of the Poor Clares at St. Omer. She soon discovered, however, that the monastic life of the Poor Clares did not fulfill her vision of religious life. With the help of her confessor, she left the convent to establish in Gravelines, Flanders, a Poor Clare convent for exiled English women who wished to live religious life.¹⁷ Through an extraordinary spiritual experience in 1609, Mary Ward received what she considered divine inspiration and conviction that her life was not to be with the Poor Clares but to serve God by means of some “other thing” which would bring about God’s greater glory. Consequently, she left the new Poor Clare convent which she herself had

¹⁴ See BURKE, *Freedom, Justice and Sincerity*, 22. See also COVER, *Love, the Driving Force*, 30; ROFE, “Mary Ward,” 4-5.

¹⁵ See HONNER, “Mary Ward: Friendship and Spiritual Ministry,” in *The Way Supplement*, 53 (1985), 38.

¹⁶ See WRIGHT, *Mary Ward’s Institute*, 4; ROFE, “Mary Ward,” 5.

¹⁷ See PETERS, *Mary Ward*, 83-84.

established.¹⁸

In a state of uncertainty and lack of clarity on what was the will of God for her, Mary Ward returned to England. There, with a group of like-minded women, she engaged in works of charity and of teaching the faith. During these apostolic activities, Mary Ward received another spiritual experience in which she gained more light and clarity on the kind of religious community she was to establish. In this experience, she received the inspiration to establish a religious institute where life and work are modeled on the Constitutions of the Jesuits.¹⁹ In 1615, Mary Ward received yet another spiritual experience. Through this experience, known as the Vision of the Just Soul,²⁰ she reported to have received divine enlightenment on what qualities her members were to possess. They were to be women wholly committed to God, in total

¹⁸ The Glory Vision refers to one of the profound mystical experiences of Mary Ward which defined the purpose of her Institute, that is, one which was to give glory to God. The experience was preceded by a period of uncertainty and spiritual turmoil after her departure from the convent of the English Poor Clares and her return to England. See WRIGHT, *Mary Ward's Institute*, 6; ROFE, "Mary Ward," 7. The vision, which Mary Ward was deeply convinced was the divine light for the path her Institute was to take, came as a great relief and a source of true happiness. It gave her a certain degree of assurance concerning the mission of the Institute. See M. ORDWAY, "Prophecy and Institution," in *The Way Supplement*, 53 (1985), 68. For the text of the Glory Vision, see IBVM, *Constitutions*, [284]-[285]; CHAMBERS, *The Life of Mary Ward*, vol. 1, 284-285.

¹⁹ The Second Vision (see IBVM *Constitutions*, 11), known by members of Mary Ward's Institute as "Take the Same of the Society," narrates Mary Ward's profound mystical experience of a deep inspiration to model her Institute according to life and rules of the Jesuits. The experience was referred to in her letter to Father John Tomson, April 1619, in CHAMBERS, *The Life of Mary Ward*, vol. 1, 453. According to M. Ordway, it was this experience which gave Mary Ward insight regarding the structure of the Institute. By adopting the Ignatian model of religious life, the members, as instruments for the salvation of souls, had to be women free from monastic enclosure, self-governed and those who are contemplatives as well as apostolic in their endeavor to fulfill the mission of the Institute. See ORDWAY, "Prophecy and Institution," 69. See also HONNER, "Mary Ward," 50; PETERS, *Mary Ward*, 114-119; BURKE, *Freedom, Justice and Sincerity*, 36-37; L. BYRNE, "Taking the Same....," in *The Way Supplement*, 61 (1988), 112-120; CAMERON, *A Dangerous Innovator*, 86.

²⁰ The Vision of the Just Soul (see IBVM *Constitutions*, [352]-[354]) is described by Mary Ward as a mystical experience in which God showed her visibly the state of a just soul. She understood a just soul as one adorned with great glory, imbued in freedom, justice and verity, a soul in perfect state of holiness and in complete union with God. See PETERS, *Mary Ward*, 170-174. Her sisters were to be women of virtue and goodness, charitable and with sincere zeal for the salvation of souls. The key qualities of justice, freedom and sincerity were to be the distinguishing marks of her members. Christine Burke adds that the just soul consists in being wholly committed to God and ones whose union with God takes them outside themselves. Mary Ward referred to this union with God as a "singular freedom," that is, detachment from earthly things so as to be disposed to all good works and works of justice in openness to God. See BURKE, *Freedom, Justice and Sincerity*, 39. See also ORDWAY, "Prophecy and Institution," 69.

freedom, and at the same time, devoted to good works imbued with the qualities of justice, freedom and sincerity.²¹ These qualities drawn from her experiences have remained very central as elements of the formation of members of the Institute.

The model of Mary Ward's apostolic religious community met fierce opposition from both the Society of Jesus and the hierarchy of the Church.²² On the part of the Jesuits, after the experience of Ignatius with women admitted to the order, Ignatius resolved not to take charge henceforth of any religious congregation of women.²³ The Church legislation at the time was demanding cloistered life for all convents of nuns, and changing the rule to allow any congregation of women to adapt rules and manner of life outside the cloister would cause tension within the canonical system of the Church.²⁴

Throughout Mary Ward's life, her repeated requests for the approval of her Institute by the Church remained unsuccessful. Despite the good works she and her companions carried out and the rapid expansion of the group, her community was constantly held in suspicion by the ecclesiastical authorities. Eventually she was declared a heretic, schismatic and rebel of the

²¹ See IBVM *Constitutions*, 1.11.

²² See ROFE, "Mary Ward," 10-11. See also WRIGHT, *Mary Ward's Institute*, 24-26; WETTER, "Mary Ward's Apostolic Vocation," in *The Way Supplement*, 17 (1972), 88-91; PETERS, *Mary Ward*, 246-266.

²³ Two unfortunate episodes in his own life involving influential women made Ignatius determined to avoid such a development. The episodes involved the admission into the Society of Jesus of Juana of Austria and of Isabel Roser, both determined to be professed members of the Society. Juana of Austria was the sister of Philip II of Spain. Given her royal status, Ignatius had no option but to admit her, though in the strictest secrecy, giving her a code name "Mateo Sanchez." Another woman was Isabel Roser, a wealthy benefactor from Barcelona, whom Ignatius admitted to the Society with great reluctance. Determined to make profession of vows in the Society of Jesus, Isabel Roser, petitioned the Pope who responded in her favor. Ignatius was obliged to profess her. However, difficulties soon arose when she accused Ignatius of misappropriating her goods. The matter was resolved in court in Ignatius' favor. He then successfully had Isabel's vows commuted to private vows of obedience to the diocesan bishop. Ignatius henceforth resolved that the society was not to have as their subjects any community of women wishing to place themselves under obedience to the Society. See J. REITERS, "Ignatius and Ministry with Women," in *The Way Supplement* 74 (1992), 14-16. See also H. RAHNER (ed.), *Saint Ignatius of Loyola: Letters to Women*, New York, Herder and Herder, 1960, 251-295.

²⁴ See GALLAGHER, "The Church and Institutes of Consecrated Life," 6.

Church, was imprisoned in Munich, and the group suppressed in 1631.²⁵ Mary Ward died in 1645, leaving behind a small group of companions who remained faithful and continued her work. It is through their fidelity that the Institute survived and expanded.²⁶

3.1.2. The Growth and Expansion of the Institute

When Mary Ward died in 1645, the small group of companions she left were scattered in York, Rome, Munich, and possibly in London, the only foundations which had survived after the suppression. This small group reconstituted the Institute and continued to press for its canonical approval and for access to the Constitutions of the Jesuits. After several unsuccessful attempts, finally, in 1703, Pope Clement XI approved the 81 rules which members had drawn, based upon the Jesuit Constitutions and on the original inspirations of Mary Ward.²⁷ In 1749, Pope Benedict XIV recognized the authority of the general superior over the houses but forbade members to claim Mary Ward as their foundress. In 1877, the Institute was approved by the Church as an apostolic religious institute of pontifical right and only in 1909, was Mary Ward acknowledged

²⁵ See WRIGHT, *Mary Ward's Institute*, 24- 30.

²⁶ For further reading on Mary Ward and the beginnings of the Institute, see M. PHILIP, *Companions of Mary Ward*, London, Burns, Oates and Washbourne, 1939; M. LOYOLA, *Mary Ward Foundress of the Institute of the IBVM*, London, CTS, 1922; I. WETTER, *Mary Ward under the Shadow of the Inquisition, 1630-1637*, translated by B. GANNE and P. HARRISS, Oxford, Way Books, 2006; M.M. LITTLEHALES, *Mary Ward, Pilgrim and Mystic, 1585-1645*, Kent, Burns & Oates, 1998; P. PARKER, *The Spirit of Mary Ward, Her Character and Spirituality: Religious Perfection according to Mary Ward*, Vatican, Polyglot Press, 1945; IBVM (ed.), *The Heart and Mind of Mary Ward*, Norfolk, Carmelite Monastery, 1985; C.I. GÖRRES, *Das große Spiel der Maria Ward*, Frankfurt-am-Main, Verlag Joseph Knecht, 1952, English translation by E. CODD, *Mary Ward*, London, Longmans, Green, 1939; K. MCGOVERN, *Something More Than Ordinary: Early History of Mary Ward's Institute in North America*, Richmond Hill, The I Team Publishers, 1989; W. NIGG, *Mary Ward: Eine Frau gibt auf*, Munich, Don Bosco Verlag, 1983; F.L. BARMAN, "Mary Ward: Centuries Her Scroll," in *RfR*, 59 (2000), 608-613; A. FRASER, "Mary Ward: A 16th Century Reformer," in *History Today*, 31 (1981), 14-18; J. MARMION, "Some Notes on the 'Painted Life' of Mary Ward," in *Recusant History*, 18 (1986-1987), 318-322; M. O'CONNOR, *That Incomparable Woman*, Montreal, Palm, 1962.

²⁷ See IBVM, *Constitutions*, 20.

as its foundress.²⁸

From this small remnant that Mary Ward had left, the Institute flourished and established foundations in every continent in the world. Besides the houses which existed at the time of the death of Mary Ward, her first companions²⁹ opened the Bar Convent in York, in 1686, on their return to England. Other foundations were Mainz and Munich in Germany, and St. Pölten in Austria.³⁰

The Institute then grew steadily and gained considerable influence in both political and ecclesiastical spheres. Difficulties in communication, confusion with regard to allegiance of the local houses to their local bishops and to their superior general coupled with political interference, all led to serious problems regarding ecclesiastical jurisdiction over the Institute. In Europe, the Institute separated into six branches with three unofficial generalates.³¹ Mainz (which later, in 1929, moved its generalate from Nymphenberg to Rome),³² Munich³³ and St. Pölten.³⁴

For the generalate in Mainz, it was the political authorities of Mainz which forbade the house from being under the jurisdiction of Munich. With secularization in Germany, education

²⁸ Ibid.

²⁹ "The companions," as Mary Ward's referred to them, were her first founding group drawn from close relations and friends. This group was composed of young women who were drawn to share her vision and support her endeavors. The survival of the Institute after Mary Ward's death is attributed to their efforts. They were: Mary Poyntz, Winefrid Wigmore, Johanna Brown, Susanna Rookwood, Catherine Smith, Barbara Babthorpe and Mary's sister, Barbara Ward. See CAMERON, *A Dangerous Innovator*, 216-232. See also BURKE, *Freedom, Justice and Sincerity*, 65.

³⁰ See WRIGHT, *Mary Ward's Institute*, 88-89.

³¹ See *ibid.*, 94.

³² See *ibid.*, 158.

³³ See *ibid.*, 90.

³⁴ See *ibid.*, 91.

fell under the control of the state, and all religious houses and institutions were suppressed. For this Generalate, it was the state authorities of Mainz that protected the convent and allowed it to continue with its activities on condition that it separated from the jurisdiction of Bavaria.³⁵ For the Austrian generalate, the separation was motivated by the intervention of the Empress Maria Teresa who defended and protected the St. Pölten convent. The convent, however, had to abide by the condition that it accepted no foreign interference, including papal authority. Consequently, the St. Pölten convent was cut off from the rest of the Institute. In 1742, Pope Benedict XIV granted it the status of a generalate.³⁶ Houses in Italy which survived during the suppression of the Institute were brought under this generalate.³⁷

In England, the structure of the community was shaped by ecclesiastical influence. The Institute had survived with the Bar Convent during its suppression in 1631. This convent, however, remained cut off from Munich and the rest of the Institute, due to severed communication from the chief superior in Munich. In 1810, the superior of the convent, Elizabeth Coyney, requested the local Ordinary to accept full jurisdiction over the community and petitioned to Rome to separate officially from Munich.³⁸ Rome responded positively in 1816 and put the convent under episcopal control. The community adapted a more monastic character of life and, eventually, the diocesan authorities imposed a stricter enclosure with diminished contact with the world, contrary to the founding vision of the community. Subsequent diocesan bishops continued in the same vein and the community moved further and further from their

³⁵ See *ibid.*, 89.

³⁶ See *ibid.*, 88.

³⁷ See *ibid.*, 91.

³⁸ See *ibid.*, 96.

original way of life.³⁹ York eventually rejoined Munich in 1911.⁴⁰ For much of the 19th century, the three branches of the Institute remained separated but with ongoing conversations on the possibility of reunion. The three branches worked on the writing of Constitutions to be adopted by all of them.⁴¹

The different branches of the Institute in Europe remained separated for much of the 19th century. It was only in 1935 that all three generalates of the Institute were united under one generalate situated in Rome.⁴² The reconstituted Institute, known as the Roman Branch, petitioned the Apostolic See for the approval of Rules adapted from the Jesuit Constitutions.

From the Roman Branch, two other new branches came into being. A new branch of the Institute, known as the Irish Branch came into being through the efforts of Mary Teresa Ball, an Irish woman. She had been sent by her bishop to the Bar Convent in York to be trained by the Mary Ward sisters of the Roman Branch, so that she could establish a similar institute in Ireland.⁴³ After having her religious training in York and equipped with the Rules of the Mary Ward Sisters, Mary Teresa Ball founded a similar but independent institute in Ireland in 1821. She established the first and principal house in Dublin and named it Loreto Abbey, Rathfarnham.⁴⁴ She also re-modeled the Rules to suit her new foundation according to what she considered faithful to the Foundress' plan for the Institute. These rules were printed in 1832 for

³⁹ See *ibid.*, 98-99.

⁴⁰ See *ibid.*, 156.

⁴¹ See *ibid.*, 156.

⁴² *Ibid.*

⁴³ See E. MACDONALD (ed.), *Joyful Mother of Children: Mother Francis Teresa Ball, IBVM*, Dublin, M.H. Gill, 1961, 52-53.

⁴⁴ See *ibid.*, 75.

use of the Institute's members.⁴⁵

During the lifetime of Mary Teresa Ball, the Irish Branch rapidly expanded with foundations in different parts of Ireland and in foreign missions. By the end of the 19th century, the Irish Branch had eight provinces and two missions, with its generalate house in Rome, and with members involved mainly in education work.⁴⁶ Following the call of Vatican II to appropriate renewal, the Branch has been engaged in endeavouring to reclaim the charism and spirituality of the Foundress. In its 1985 General Chapter, the Irish Branch remodelled its Constitutions to a feminine adaptation of the Jesuit Constitutions, which were approved by the Holy See in 1985.⁴⁷

The other new branch of the Institute became the North American Branch. The Branch had its beginning with the request of Bishop Michael Power of Toronto Archdiocese to Mary Teresa Ball, to send her sisters to Canada to establish schools for Catholic children of Irish immigrants in the diocese.⁴⁸ On September 16, 1847, five young Irish sisters arrived in Toronto from Ireland in the middle of a typhus plague which had struck the country. The Archbishop died from the plague shortly after their arrival and the diocesan see remained vacant for three years. This meant that the sisters, very young and in a new foreign country had to start their work in a diocese without a diocesan bishop, or any advisor, not to mention having to cope with the harsh winters. This initial challenge was made worse by the death of three of the pioneer sisters, while the fourth one had to return to Ireland due to ill health. The only survivor, Sr. Teresa Dease, with

⁴⁵ See D. FORRISTAL, *The First Loreto Sister, Mother Teresa Ball 1794-1861*, Dublin, Dominican Publications, 1994, 53 and 55. See also IBVM, *Rules of the Institute of the Blessed Virgin Mary*, Dublin, Richard Coyne, 1832.

⁴⁶ See WRIGHT, *Mary Ward's Institute*, 88-89.

⁴⁷ See IBVM, *Constitutions*, 20.

⁴⁸ See MACDONALD, *Joyful Mother of Children*, 213-214.

determination and courage, established the Institute in Toronto. Due to difficulties and delays in communication and cultural differences, the North American foundation became a separate generalate in 1881.⁴⁹ Sr. Teresa Dease became the first superior of the new branch of the Institute and during the thirty-seven years of her leadership, she opened twelve houses in Canada.⁵⁰ By the end of the 19th century, there were over thirty additional houses and about three hundred members in Canada and the USA, with the principal apostolate being education.⁵¹ While the three Branches remained juridically separated after the reconstitution of the Institute in 1877, efforts towards reunion have always been part of their discussions.⁵² The issue of reunion was taken up seriously by the North American Branch in their 1995 General Chapter. In the same year the members of the North American Branch, after a process of discernment, resolved to seek juridic union with the Irish Branch. The two Branches entered into a discernment process between the years 2000 and 2003. The fruit of the process was the establishment of a juridic union between the Irish and the North American Branches, in January 2003.⁵³ With the approval

⁴⁹ See WRIGHT, *Mary Ward's Institute*, 141. See also IBVM, *Constitutions*, 21.

⁵⁰ Houses established by Teresa Dease in Canada were: Loretto House, Duke Street (1847), Wellington Street (1848), Bathurst Street (1853), Brantford (1853), London (1855), Guelph (1856), Belleville (1857), Niagara Falls (1861), Bond Street (1862), Hamilton (1865), Loretto Abbey (1867), Lindsay (1874), Stratford (1878) and in USA, Joliet, IL (1880), in CPAT, Box 15.

⁵¹ See *ibid.* The additional houses are: Wellesley Crescent, Toronto (1890), Eaglewood, IL (1892), Sault Ste. Marie, MI (1986), Woodlawn, Chicago (1905), Dovercourt Road, Toronto (1910), Proctor Boulevard, Hamilton (1915), Brunswick, Toronto (1915), South Shore Drive, Chicago (1920), Annette Street, Toronto (1920), Sedley, SK (1921), Saskatoon, SK (1922), Motherhouse, Loretto Abbey, Toronto (1927), Novitiate, Englewood, Chicago (1927), Regina, SK (1932), Port Colborne, ON (1937), Fort Erie, ON (1944), Flemington, NJ (1945), Estevan, SK (1945), Bolton, ON (1946), Maryholme, Roche's Point, Keswick, ON (1946), Wheaton, Chicago (1946), Phoenix, AZ (1949), St. Sacramento, CA (1949), Weyburn, SK (1950), Northlake, Chicago (1953), Detroit, MI (1954), Glen, MI (1959), Western Springs, Chicago (1961), Carol Stream, IL (1967), Pittsburg, PA (1969), Mohawk Road, Hamilton (1970), South Dante Avenue, Chicago (1970), Oak Lawn, IL (1975), Indian Road, Toronto (1977), Brampton, ON (1978), Harvey, IL (1978), Downers Grove, IL (1980), Bensenville, IL (1981), Joliet, IL (1982), and Westchester, IL (1983).

⁵² See *ibid.*, 138-148.

⁵³ See The Institute Report 1998-2006 Booklet, 3-4, in CPAT, Box 88.

of the petition to Rome for reunion on March 17, 2003, these two Branches of the Institute fused together, bringing forth a new Branch of the Institute known as Loreto Branch.⁵⁴ This was followed by the revision of the Constitutions which were approved by the Holy See in 2009.⁵⁵

The Roman Branch of the Institute has remained separate, focusing more on claiming the original identity and vision of the Foundress. In 2001, the Branch embarked on a possible change of the name of the Institute, from the Institute of the Blessed Virgin Mary to the Congregation of Jesus. Eventually, in 2002, the Roman Branch changed its name to Congregation of Jesus which since then has been approved by Rome.⁵⁶ The present two Branches of the original Institute founded by Mary Ward, even though juridically separated, on many occasions continue to engage in activities of common interest.⁵⁷

The Institute which was originally founded by Mary Ward presently exists as two institutes, the Congregation of Jesus (*Congregatio Gesu*) and the Institute of the Blessed Virgin Mary (Loreto Sisters), the latter being the institute under the present study.

The present structure of the Institute of the Blessed Virgin Mary (Loreto Sisters) comprises the two former Branches, the Irish and the North American one which reunited in 2003.⁵⁸ With a new identity, the Institute has brought together the diverse richness of cultural

⁵⁴ See IBVM, *Constitutions*, 21.

⁵⁵ Ibid.

⁵⁶ See The Institute Report 1998-2006 Booklet, 24, in CPAT, Box 88. See also S. GEMMA, "Playing within the Rules," in *The Way*, 51 (2012), 14.

⁵⁷ The two Branches collaborate on issues like vocation promotion, preparation of the annual Mary Ward Week Prayer Booklet, and organization of mutual meetings. See The Institute Report 1998-2006 Booklet, 14 and 23, in CPAT, Box 88.

⁵⁸ The new Institute brings together eight provinces, two regions and one community, with membership drawn from five continents: Asia, Africa, Europe, America and Australia. See The Institute Report 2006-2014 Booklet, 12, in CPAT, Box 91.

and historical realities, and varied ways of living the Ignatian way of life. While the former Irish Branch modeled its way of life largely on the Jesuit Constitutions, the former North American Branch had a more feminized version of the Ignatian way of life, adapted to their circumstances. These two realities have been integrated in the reunited Institute through the fusion of the two sets of Constitutions of its former Branches into a two-volume Constitutions. The first volume expresses the Ignatian way of proceeding while the second one reflects the feminine way of living the Ignatian model of religious life appropriate for the present times.⁵⁹ The union was seen by most members as a fulfillment of the desire of the Foundress for unity of the Institute and as a means of opening of opportunities for bonding, sharing of resources and personnel, preserving the charism of the Foundress and achieving a fuller understanding of the international and intercultural identity of the Institute.⁶⁰ As the Institute leader expressed in the Institute Report of 2006-2014, the reunion has brought to the Institute a new identity and membership.⁶¹

Inasmuch as the union has brought many blessings, it has brought with it challenges as well. Like many international religious institutes, the new Institute of the Blessed Virgin Mary is confronted with the scenario of an imbalance of vocations prospects and varied membership composition as mentioned in the document *Starting Afresh from Christ*.⁶² Of the two former Branches, one has a good number of vocations and relatively younger membership still involved in active ministry and in charge of the Institute apostolates. The other former Branch has a higher average age, very few vocations since Vatican II, with most members retired from active ministry and Institute apostolates no longer in the hands of the members. In terms of formation,

⁵⁹ See IBVM, *Constitutions*, 7.

⁶⁰ See GEMMA, "Playing within the Rules," 14.

⁶¹ See The Institute Report 2006-2014 Booklet, 13, in CPAT, Box 91.

⁶² *Starting Afresh from Christ*, nos. 12 and 17, in *Origins*, 32 (2002-2003), 135 and 137, respectively.

while some regions have groups in formation, other regions have only one or two persons with no formation peers and with a very wide age gap when compared with other members.⁶³

3.2. Formation in the Institute of the Blessed Virgin Mary

This section discusses the formation structure in the Institute. It treats of the recent directions, aims and stages of formation in the context of living the vows. This is to give an overview of the structure of the formation programme of the Institute in the context of the lived experience of the sisters.

3.2.1. Recent Directions in Formation in the Institute of the Blessed Virgin Mary since Vatican II

Since Vatican II, there has been a series of efforts towards the revision of formation programmes in the Institute. In their efforts towards adjusting the formation programme in obedience to the proposed norms of *Renovationis causam* and the innovations brought about by the 1983 Code of Canon Law, each of the two Branches of the Institute followed a different path in the process of renewal which also influenced their respective formulation of the formation programme. The Irish Branch placed emphasis more on a mission-oriented formation while the North American Branch adopted a structure which was more person-oriented. The former stressed a formation programme based on Ignatian spirituality which could suit well the local needs and circumstances of the different regions of the Institute,⁶⁴ while the latter put emphasis

⁶³ See The Institute Report 2006-2014 Booklet, 17, in CPAT, Box 91. See also Section 4 on membership, in The Final Report of the IBVM Capacity for Life and Ministry, Resource Assessment Prepared by L&P Financial Trustees, Dublin, Ireland, 2012, in CPAT, Central Leadership Correspondence, Box, 109.

⁶⁴ See Formation Proposals for GC 1986, sent to the General Congregation 1986, which recommended that each province draw up its own formation document which recognizes the particular cultural needs of the country (in Central Archives, Institute of the Blessed Virgin Mary, Dublin [=CAID], File AW-PH-FM-1).

on the growth of the person in terms of integration of life by means of a harmonious fusion of spiritual and apostolic life.⁶⁵

Prior to the promulgation of the 1983 Code, the formation of members in the North American Branch throughout the 20th century was focused on professional upgrading and training, following the call for professional training for sisters as indicated by Pius XII.⁶⁶ Efforts towards re-evaluation and revision of the overall formation structure appear to have been focused on how best members could be formed in order to integrate the community and apostolic aspects of life, especially for those in temporary vows.

The 1955 General Chapter had decreed that, in view of ministerial preparedness, all members, with fewest possible exceptions, were to obtain a university degree or its equivalent. The chapter also instructed that juniorates be established in Canada and in America and members in temporary vows sent to study at *Regina Mundi* theological institute for women in Rome.⁶⁷ The 1961 General Chapter reported on the positive development of the two juniorates and the success of the professional upgrading of the sisters.⁶⁸ The 1967 General Chapter, which was recognized as a chapter of renewal, insisted on the re-evaluation of the connection between ministry and community in the formation programme. It also recognized the apostolate of the Institute as

⁶⁵ The 1977 Formation Handbook states: "The aim of formation is to help the sister to get supportive structures and guidance to enable her to assume more responsibility for her personal and spiritual growth" (10, in CPAT, Box 136, File 17).

⁶⁶ See footnote no. 14 of Chapter One concerning *Regina mundi* theological institute, affiliated to the Gregorian Pontifical University, erected by Pope Pius XII for women religious aimed at equipping them with necessary professional skills and training for apostolic competence.

⁶⁷ The Canadian juniorate was opened in 1960 and the American one in 1962. See C. DAWSON, Remembering the Themes of Community and Ministry in IBVM Chapters 1947-1981, Toronto, Loretto Abbey, 1986, 13-14, in CPAT, Box 71.

⁶⁸ See Report on Education and Goals of IBVM in America and Canada, in General Statements 1955-2006, in CPAT, Box 77.

extending beyond education to all other works which would bring the face of Christ to humanity. This new development in the understanding of apostolate necessitated the revision of the formation programme. The revised programme was adopted by the 1977 General Chapter.⁶⁹

The North American branch's formation programmes in the 1980s focussed on preparing members for corporate mission undertaken in diverse ministries. The formation programme adopted by the 1977 General Chapter was revised in 1981⁷⁰ and 1987.⁷¹ In the 1990s, the emphasis was on the significance of the formative community and the deepening of spiritual life as key aspects of formation.⁷² The formation programme, again revised in 1992, proposed a flexible structure aimed towards helping the temporarily professed to assume responsibility for spiritual and personal growth. Key elements of the programme were: guidance in adjusting to varied community lifestyles, harmony of apostolate and community life, growth in the necessary maturity and freedom in personal responsibility, preparation for leadership roles in the Institute

⁶⁹ The 1977 Formation Programme was adopted *ad experimentum*, in view of a revision after four years. This was in accord with the directives of *Ecclesiae Sanctae*, II, no. 6, in *AAS*, 58 (1966), 778, in *FLANNERY I*, 625.

⁷⁰ The 1981 Formation Programme, adopted by 1981 General Chapter was in line with the recommendation of the 1977 General Chapter that the programme be refined in view of experience and modified so that it be enriched. See GENERAL CHAPTER 1977 (August, 1-12, Toronto), Recommendations and Experimental Ordinances of the Revised Formation Programme, in CPAT, Box 136, File 17.

⁷¹ See IBVM in North America: Formation Programme, December 1986, in CPAT, Box 136, File 17. The revision was necessitated by the new Constitutions of 1986

⁷² Between 1987 and 1988, the formation team was mandated to re-evaluate the formation programme and draw up a report in view of the programme's revision. The summary report indicated that for the temporarily professed, the experience of a variety of community lifestyles was most helpful in helping them integrate prayer, community living and apostolate. However, the report pointed out the challenges with the process of review and evaluation which was considered by the temporarily professed as most burdensome, unproductive and ineffective. These characteristics were attributed to the lack of clarity of the format of skills for honest confrontation and of clear basis for evaluation, to the development and gradual nature of formation and responsibility of the local leader towards members' understanding of the formation programme. See E. HUNTER and R. LYNCH, The Evaluation Report on the Implementation of Formation Programme, February 28, 1988, in CPAT, Box 136, File 23. See also The Report to the General Superior and Council on the Follow-up on Evaluation of the Formation Conference held at Weber Centre, March 28, 1987, in CPAT, Box 136, File 13. The evaluation pointed to the concern about the misunderstanding of members towards those in formation with regard to the demands of mission and the building of formative communities. Discussion on the meaning of formative community seemed to conclude that a quality community life necessary for a right formation atmosphere is to be examined by the entire Institute membership. See M. LANTHIER, The Report on Re-Evaluation of the Formation Programme, in CPAT, Box 136, File 23.

and orientation into the life and mission of the Institute according to the vision of the Foundress.⁷³ Due to the most recent absence of persons in initial formation, not much attention was given to formation in the North American Branch up to the time of reunion in 2003.

The Irish Branch for its part focused more on formation for mission. Unlike the North American Branch, the Irish Branch had considerable numbers of members in initial formation and, therefore, it established a geographical presence in many culturally diverse regions in the world. This implied restructuring of the formation programme that could suit the local needs and circumstances of the different regions of the Institute. In response to Vatican II's call to renewal, besides other aspects of life in the Institute, the former Irish Branch took to the overall revision and modification of the formation programme, according to the recommendations on formation presented in *Renovationis causam*. This resulted in more focused attention by the Institute's leadership to formation and included workshops and meetings of formation personnel and the constant revision of the formation handbook.

Two workshops organized by the central leadership for formation personnel took place in Rome.⁷⁴ The participants strongly recommended the revision of the formation structure in order that it suits better the cultural and social contexts and circumstances of those in formation. The recommendation on the revision of formation structure, especially that of the period of temporary vows, was included in the list of proposals for the 1986 General Chapter.⁷⁵ The workshops

⁷³ See The 1992 Revised Formation Handbook, in CPAT, Box 136, File 13.

⁷⁴ See A. WALSH, letter to formation personnel regarding the formation course in Rome (18 March - 30 April, 1984, 18 May - 15 June 1984), March 18, 1984, in CAID, File AW-3-FM-1. The course was aimed at helping the formation personnel to understand the Church's recommendations for formation as prescribed in *Renovationis causam*. The course was to include Ignatian spirituality, and the history of the Church and of the Institute. The letter suggests that each province draw up its own formation programme.

⁷⁵ There was a general suggestion across the provinces for the revision of the 1977 Institute Booklet on Formation, with a recommendation that each province draw up "its own formation document which recognizes the particular cultural needs of the country." The report highlighted the difficulty that young sisters face during the

resulted in the revision of the 1981 Formation Handbook. Further revisions took place in 1992⁷⁶ and 1997.⁷⁷ Their focus was on the overall re-evaluation of the programme in the light of its relevance to the present circumstances and times.⁷⁸

In the era of the reunion, the Institute's leadership has continued to engage in the task of ongoing revision of the formation programme and in exploring ways of how members in different stages of formation can be best integrated into the Institute.⁷⁹ The focus has been on a formation structure oriented towards creating unity in the Institute. Such a programme would be one aimed at preparing members, especially those in temporary vows, for multi-cultural community life and for Institute-wide ministry. Challenges, such as appropriate training and formation for mission and for creating the unity in diversity, continue to be part of the ongoing

transition from the novitiate to the juniorate and urged for more concern from other members in helping the juniors in their adjustment to community life. It remarked that even though times and circumstances have changed, thus calling for flexibility and adaptation of the formation programme, special care is to be taken that ideals are not compromised. See GC 1986 Report in CAID, File AW-PH-FM-1.

⁷⁶ The report on formation prepared for the General Congregation 1992 highlighted the importance and value of the meeting of international formators, the formators' workshops, and inter-province communication on formation. See GC 1992, Formation Report, in CAID, File NM-1-FM-2.

⁷⁷ The Provincials' meeting in Calcutta (1995) identified formation as a priority topic for the GC 1998. With regard to formation of those in temporary vows, the significance of local community in formation was highlighted: the local community has a serious obligation to be a source of encouragement and of good example, so as to help those in formation live fully, joyfully and effectively. See Proposed Agenda for GC 1986, no. 7, in Formation Proposals for GC 1986, in CAID, File AW-PH-FM-1. See also GC 1998 Mandate for the Revision of the 1997 Formation Handbook, in The Institute Report 2006-2014 Booklet, 12, in CPAT, Box 91.

⁷⁸ The Provincials' meeting held in 1989 addressed the question of ongoing formation as a matter of concern in the whole Institute. A decision was reached to invite all members of the provinces to reflect and share their experiences of initial and ongoing formation. See Report from Provincials' Meeting, 1989, in CAID, File NM-1-FM-2-9.

⁷⁹ The GC 1998 passed the mandate of holding a periodic meeting of newly finally professed members of the Institute at least every two years. This was aimed at helping the younger members to build bonds of friendship, have a greater sense of the inter-culturality of the Institute and to develop a deeper sense of belonging and of identity with the wider Institute other than one's own province. Two such meetings took place: in Rome (2003) and Toronto (2005). The Extended Leadership Meeting, held in Nairobi in 2011, made a decision that the temporarily professed members be included in these meetings. Consequently, two meetings with the theme *Dream Together to Discover Possibilities* were held, the first one in Kolkata, India, in December 2012, and the second one in Mauritius, in May/June 2013. See The Institute Report 1998-2006 Booklet, 26, in CPAT, Box 88; The Institute Report 2006-2014 Booklet, 13, in CPAT, Box 91.

discernment and reflection in the Institute. Efforts have also been made towards updating the skills of those in charge of formation. At the initiative of the central leadership, an international meeting of formators and potential formators was held in Nairobi, in 2012. The meeting provided an in-service training, and time and space for participants to discuss formation in the context of the Institute-wide apostolic needs and the challenges in formation work.⁸⁰

3.2.2. Aims of Formation in the Institute

The formation structure of the Institute of the Blessed Virgin Mary has changed and evolved over the centuries since the establishment of the Institute. The formation of members has been shaped by the needs, circumstances and interventions of the Church and different realities of the Institute at various epochs of its history.

The principles of formation trace their basis to the vision of Mary Ward for her Institute and her members. The apostolic works envisioned by Mary Ward required her members to have the capacity to carry out the work of Christian formation, teaching and defense of the faith and works of charity, especially those which promoted the dignity of the human person and empowerment of women.⁸¹ They were to be women of apostolic zeal, single-minded women imbued with a spirit imbued with freedom, justice and truth.

Due to the nature of their work which required teaching doctrines of faith and secular subjects in schools, Mary Ward required of her members a high quality of religious and secular education.⁸² Their intellectual aptitude was to be well above that of their contemporaries.⁸³

⁸⁰ See B. MURPHY, letter to province leaders and directors of formation concerning the meeting of directors of formation in Nairobi, August 2, 2012, in CPAT, Central Leadership Correspondence, Box, 109. See also The Institute Report 2006-2014 Booklet, 13, in CPAT, Box 91.

⁸¹ See BRODERICK, "One Mission," 36.

⁸² See *ibid.*, 54.

According to Mary Ward, education and learning were means of attaining truth, justice and freedom, the three virtues which were the motivation behind all her works.⁸⁴ Even though the way of life envisioned by Mary Ward was incompatible with the cloister, she however required her members to have the capacity to integrate the spiritual and apostolic life. That is, they had to be contemplatives in action.⁸⁵

The proper law of the Institute presents formation as a means of preparing members for the mission of the Institute which is also that of Christ in the Church. Members therefore are to be trained so that they are empowered to promote the greater glory of God and to advance the salvation of souls through works of justice and education according to the needs of the times.⁸⁶ Formation is regarded as a process of growth and development, of discovering and learning, and a continuous means of responding to the promptings of the Spirit in preparation for mission. Centered on the gospel values, the Ignatian principles and the charism of Mary Ward, formation is to be holistic, integrated and adaptable. As H. Gray explains, this is a kind of formation which combines a tapestry of religious motives, intellectual advancement and is appropriate to the needs of the times, circumstances and places.⁸⁷ Hence the Institute emphasizes a prolonged period of probation at every stage of formation.⁸⁸

⁸³ See PARKER, *The Spirit of Mary Ward*, 68.

⁸⁴ See IBVM *Constitutions*, 1.11.

⁸⁵ See HONNER, "Mary Ward," 50.

⁸⁶ See IBVM *Constitutions*, 2.4-2.6.

⁸⁷ See H. GRAY, "The Ignatian Mission: Lay and Jesuit Companions on the Journey," in W.G. TRAUB (ed.), *A Jesuit Education Reader*, Chicago, IL, Loyola Press, 2008, 29.

⁸⁸ Prolonged formation based on lengthy testing and detailed scrutiny is a practice which Mary Ward borrowed from the Society of Jesus. Ignatius of Loyola believed that prolonged formation ensured, among other factors, the commitment and fidelity in mission in the members. See *ibid.* Notable is the remarkable number of the stipulations in the IBVM *Constitutions* dedicated to probation and formation. See IBVM *Constitutions* on prolonged

3.2.3. Formation in the Living of the Vows

The proper law of the Institute links the vows with the notion of discipleship.⁸⁹ Through the public profession of the vows of chastity, poverty and obedience, the members of the Institute are called to a radical following of Christ, to follow the example of Mary as the first disciple, and of Mary Ward the Foundress who remained faithful in following the will of God in her life.⁹⁰

Accordingly, the vow of chastity is understood as an expression of the mystery of love. It entails commitment to celibate life, forgoing all benefits of the married state of life and refraining from any acts contrary to the vow.⁹¹ The practice of the vow calls for an integration of life, integration of sexuality with demands of the vow, acceptance of a certain loneliness and solitude. The vow is strengthened by fidelity to prayer, the Eucharist and Scriptures as a means to deepen the knowledge and love of God.⁹²

In the context of formation, the members in temporary vows are to be helped to deepen their prayer life, orientated towards meditation of the Scriptures as a means of deepening their union with God. Formation is to expose the sisters to the theological understanding of the vow of chastity and its practical implications for those who follow it in religious life.⁹³ This includes

formation (5.1-5.47), on probation ([138]-[203]), on training ([307]-[546]) and on the General Examen (this is a lengthy document inherited from the Jesuit Constitutions which outlines in a detailed manner what candidates are to expect in their formation and what the Institute requires of them. It introduces the candidates to the Institute and provides the criteria for assessing their suitability for the Institute's way of life ([1]-[133])).

⁸⁹ See *IBVM Constitutions*, 4.2.

⁹⁰ See *ibid.*, 4.3.

⁹¹ See *ibid.*, 4.8-4.9.

⁹² See *ibid.*, 4.12.

⁹³ Often there is confusion with regard to the usage of the terms virginity, chastity, celibacy in reference to

helping the temporarily professed acquire skills and capacity to form mature relationships and to establish realistic boundaries in their human interactions. It also requires training in human development and self-identity as a celibate religious.⁹⁴ In turn, the assessment of suitability of a sister in formation with regard to the vow of chastity entails proof of maturity, a sense of freedom, and evidence of joy with one's choice of life. There is also to be observable signs of an integration of life, a positive sense of self-identity as a consecrated and celibate person and the capacity to form constructive and mature relationships while being at home with a certain degree of loneliness.⁹⁵

The vow of poverty implies a free choice of life where material goods are held in common and generously shared in the spirit of the gospel.⁹⁶ The proper law specifies five areas in which the vow of poverty obliges. First, the vow calls on members to accept to be cared for by

the vow. As Sandra Schneiders observes, each of the above terms has been used to refer to the vow of chastity at different periods in the history of religious life, depending on the understanding of its meaning in a given historical and social context. The earliest term used by the monastic orders is virginity, regarded as the object of solemn vows. This term proved problematic in its linguistic usage in religious life as it appeared to indicate that profession of the vow also meant revealing the past manner of life. Also, the term virginity seemed to infer a state of never having had sexual relationship as the qualification for the vow and omitting its true object as a total self donation of spiritual virginity marked with self-preserved wholeness and integrity. The term virginity was gradually replaced with chastity which implied total abstinence. Chastity was regarded as a more preferable term as it does not address a person's manner of life before entering religious life but that which he or she is expected to live after profession. This term too became problematic in its usage as chastity is a virtue required of all Christians and not a state of life as such. Professing it as a vow therefore would not distinguish religious from other Christian faithful. Celibacy was the next term to be adopted as more appropriate as it limited the vow to the understanding of an unmarried state of life freely chosen. This term too provoked a problem as to its practical meaning as there are also people who have freely chosen celibacy and single life as a state of life, although not religiously motivated. Moreover, with the present day realities whereby some religious live alone, it is often difficult to distinguish religious and non-religious celibates. See SCHNEIDERS, *Selling All*, 119-124. The most recent terminology used to refer to the vow is "consecrated celibacy," which Schneiders describes as "the freely chosen response to a personally discerned vocation to a charismatically grounded, religiously motivated, sexually abstinent, lifelong commitment to Christ that is externally symbolized by remaining unmarried" (ibid., 117).

⁹⁴ See *Formation Handbook*, 62 and 80.

⁹⁵ See *IBVM Constitutions*, 4.10.

⁹⁶ See *ibid.*, 4.14.

the Institute within its means and capacity.⁹⁷ Secondly, it obliges members to contribute to the preservation and wellbeing of the Institute by accepting a common law of labour, committing their talents, energies and time in generous service, renouncing the independent acquisition, use and disposal of anything of significant value and sharing of resources across provinces.⁹⁸ Thirdly, it invites members to develop attitudes of contentment, simplicity of life, spirit of gratitude and acceptance.⁹⁹ Fourthly, the vow calls on the members of the Institute to care for the earth and the whole creation by means of responsible use of earth's resources.¹⁰⁰ It also entails a practical affirmative action in solidarity with the poor and with those who advocate for the preservation of the beauty of the earth.¹⁰¹

The last aspect which the vow of poverty regulates is the issue of personal property of members.¹⁰² Pursuant to canon 668, the proper law of the Institute prescribes that members retain the ownership of personal property and the capacity to acquire further property through gifts, personal inheritance or any property to which they had title to at the time of profession.

⁹⁷ See *ibid.*, 4.16

⁹⁸ See *ibid.*, 4.14.

⁹⁹ See *ibid.*, 4.16-4.17.

¹⁰⁰ See IBVM *Constitutions*, 4.18; cf. FRANCIS, Encyclical Letter on Care for Our Common Home *Laudato Si'*, May 4, 2015, English translation *Encyclical on Climate Change and Inequality: On Care for Our Common Home*, London, Melville House, 2015. See also GC 2014 "Calls," in CPAT, Box 91. At the conclusion of the 2014 General Chapter, the delegates drew up the following decisions referred to as the "Calls" which stated: "As Mary Ward companions moved by the person of Jesus and the needs of our world today we seek to: 1] Reclaim the freshness of the Gospel, allowing Jesus to transform our lives, 2] bring those forced to live in poverty to the centre of our life and ministry, 3] to go where the need is greatest, 3] live sustainably, discerning what is enough and, 4] create the oneness that moves us across boundaries" (*ibid.*).

¹⁰¹ See IBVM *Constitutions*, 4.18.

¹⁰² Elizabeth McDonough observes that in most religious institutes, a grey area often exists concerning what may be categorized as personal and institute property. In order to safeguard members from the dangers of violation of the vow which may arise from such possible confusion, she proposes that what is categorized as personal and institute property be clearly distinguished and the manner of possession, use, and administration of personal goods by members of religious institutes in relation to their vow of poverty be properly articulated to members. See E. McDONOUGH, "Poverty, Patrimony and Nest Eggs," in *R/R*, 50 (1991), 617.

Members, however, by virtue of the vow of poverty, forego the use and benefit of their personal patrimony. They also have to appoint someone else or the Institute itself to carry out the administration of their patrimony¹⁰³ and to draw up a will in accord with civil and canon law. Changes in the will concerning administration arrangement can be made by the member only with permission of the province leader, after she had consulted her council and the province treasurer.¹⁰⁴ Likewise, to dispose of part or all of her patrimony within the limits laid down by the General Chapter, a member requires the permission of the Institute leader who must consult her council on the matter. Ordinarily, such permission is not granted to a member during the lifetime of her parents or before the elapse of ten years following perpetual profession.¹⁰⁵ A member also requires permission from the province leader to accept the role of legal administrator of goods which are not the property of the Institute.¹⁰⁶

In the context of formation, the vow of poverty calls for deepening the knowledge and appreciation of the object of the vow and what it entails.¹⁰⁷ The Institute highlights principles of sharing, independence, accountability, stewardship, witness and care for the earth. Formation during the period of temporary profession in reference to the vow of poverty is to help members to deepen their understanding on matters of justice, especially towards those on the margins of

¹⁰³ See *IBVM Constitutions*, 4.19.

¹⁰⁴ See *ibid.*, 4.20.

¹⁰⁵ See *ibid.*, 4.21.

¹⁰⁶ See *ibid.*, 4.23.

¹⁰⁷ Patricia Wittberg explains that consecrated poverty is to be understood beyond its traditional meaning which limits it to the practice of religious holding resources in common and asking for permission from superiors before using anything. The ultimate meaning of the vow is to be understood as the complete dependence on God's providence as well as the interconnectedness of the human person with the whole of creation. The vow of poverty is also to be understood as a witness to God's gifts to be shared by all. It is the appreciation of the value of human relationships over possessions, ecological stewardship of all creation and the concern for and solidarity with the poor. See P. WITTEBERG, *Pathways to Recreating Religious Communities*, New York/Mahwah, NJ, Paulist Press, 1994, 138.

society, and on ecological issues. As Donna Markham remarks, “formation must prepare women and men to become agents of peace-building and community development.”¹⁰⁸

Proof of suitability for permanent commitment entails the ability of the member in temporary profession to demonstrate a deepening in the understanding of the vow of poverty and its implications. There are to be observable signs of her sense of poverty and its expressions in the world, an active interest in matters of justice and peace, ecological issues and concern for those on the margins of the society. She is also to demonstrate her appreciation of the vow of poverty by her dependence on the Institute for her needs, accountability in ministry and in other responsibilities assigned to her and, contentment with the life as it is lived in the Institute.¹⁰⁹

The third vow, obedience is presented in the Constitutions as the expression of the abiding desire to identify with the mission of Christ.¹¹⁰ The vow, therefore, is the means through which members of the Institute, as individuals and as the whole Institute, discern the will of God.¹¹¹ In accord with the Ignatian tradition and the charism of the Foundress, members seek the will of God through discernment,¹¹² obedience to lawful directives from the Institute’s leaders, the stipulations of the Constitutions and other documents of the Institute,¹¹³ as well as the writings of the Holy Father in matters related to mission.¹¹⁴ In the contemporary theological

¹⁰⁸ MARKHAM, “Multiculturality and Formation for Mission,” 112.

¹⁰⁹ See *Formation Handbook*, 63.

¹¹⁰ See *IBVM Constitutions*, 4.24.

¹¹¹ See *ibid.*, [659] and 4.25.

¹¹² *Ibid.*, 4.28: “Since the Institute as a whole has a responsibility to seek and do the will of God, our vow calls us to an obedience which is corporate and personal where the practice of discernment is central to our way of proceeding.”

¹¹³ See *ibid.*, 4.26.

¹¹⁴ See *ibid.*, [548]; 4.27: “As members of an Institute dedicated to the service of God and the whole Church, in the tradition of Mary Ward, we offer obedience to our Holy Father, the Pope, particularly in relation to

understanding of religious life, the meaning of the vow of obedience goes beyond submission of members to the directives of their leaders and renunciation of personal freedom. As Sandra Schneiders remarks, the ultimate goal of living the vow is the transformation of the world to evangelical justice and freedom.¹¹⁵ The vow therefore calls on the members of the Institute to design structures and commitments assigned to endeavours for justice, protection of rights of persons and policies which promote human advancement and freedom.

At a personal level, the vow calls on members to treat their leaders with a spirit of openness, charity and trust, seeing them as those who take the place of Christ. The vow entails accountability and personal disclosure with regard to giftedness, abilities and limitations to the competent Institute leaders and a spirit of readiness for mission.¹¹⁶ Obedience calls for some personal sacrifice and flexibility. It entails seeking appropriate permissions from the Institute leaders even to carry out instructions of higher authority outside the Institute.¹¹⁷ The vow also obliges the Institute leaders to exercise authority in the servant-leader model of Christ,

mission.”

¹¹⁵ See SCHNEIDERS, *New Wineskins*, 112.

¹¹⁶ See IBVM *Constitutions*, [551]: “Likewise, it should be strongly recommended to all [members] that they should have and show great reverence, especially interior reverence for their superiors, by considering and reverencing Jesus Christ in them; and from their hearts, they should warmly love their superiors in him. Thus in everything they should proceed in a spirit of charity, keeping nothing exterior or interior hidden from their superiors desiring them to be informed about everything so that the superiors may be better able to direct them in everything along the path of salvation and perfection.” While constitution [551] reflects the Ignatian spirit in the manner of proceeding in the Institute with regard to the vow of obedience, the phrase “keeping nothing exterior or interior hidden from their superiors” may appear to insinuate a requirement of manifestation of conscience to superiors by members, an act prohibited by the provisions of c. 630 § 5. The possible misunderstanding is however clarified in constitution 4.29 stating: “[members] are to make known to province and institute leaders [their] aspirations and desires [...], strengths and weaknesses so that they [leaders] may know how best to place their [members] gifts at the service of mission.” The Institute’s privacy policy makes further clarification on the matter by explaining that personal information of members is collected and retained only for the purpose of, 1) assessing suitability for application, membership of and continued involvement in a ministry of the Institute, and 2) for understanding better the needs, requirements and suitability of applicants and members. See IBVM, *Privacy Policy*, nos. 13-15, in *Formation Handbook*, 91-92.

¹¹⁷ See IBVM *Constitutions*, 4.29.

encouraging voluntary and positive obedience, building relationships of trust and friendship where loving concern for everyone and the common good is the focus.¹¹⁸

In the context of formation, the temporarily professed member is to be helped to understand and appreciate the role and structure of leadership in the Institute, the principle and practice of the Ignatian way of discernment, the relationship between the vow and the mission of the Institute. Proof of integration of the vow in the member's life is the growing capacity to live the vow of obedience, demonstrated by the openness, love and interest in the mission of Institute. Proof of the capacity to live the vow of obedience also includes a growing trust in the Institute leadership and its structures, a willingness to take up tasks assigned and carry them out with joy and verity, generosity, openness of mind and an interest in understanding the human culture from the global perspective. This calls for formation which integrates all aspects of religious life so that the member acquires the necessary capacity to fulfill the mission of the Institute.

3.2.4. Stages of Formation

The proper law of the Institute outlines six phases of formation in the Institute which are: 1) initial contact with those enquiring about religious life through vocation promotion ministry, 2) candidacy, 3) novitiate, 4) temporary profession, 5) tertianship and 6) ongoing formation after perpetual profession.¹¹⁹ The Constitutions outline the general principles of formation, while the details on aims, requirements, components, structure, duration, tasks of those involved and manner of transition from every phase of formation are spelled out in the *Formation Handbook*.

The first phase of formation, which involves vocation promotion ministry is the stage of

¹¹⁸ See *ibid.*, 4. 32.

¹¹⁹ See *ibid.*, 5.1-5.47.

initial contact with potential candidates for admission into the Institute. This phase, which is considered a shared responsibility for all members, involves sharing of the Institute's charism widely, attracting potential candidates through witness of members' lives and accompaniment of those who have expressed the desire to discern their vocation to religious life in the Institute.¹²⁰ The proper law specifies vocation ministry as an office in the Institute, occupied by a director who is normally assisted by a team. The director animates and coordinates the team, keeps contact with potential candidates, carries out the vocation programme, accompanies and updates the province leader on suitability of potential candidates for admittance to candidacy and helps such candidates in their transition to candidacy.¹²¹

The second phase of formation in the Institute is candidacy.¹²² The *Formation Handbook* describes the stage of candidacy as time and space for personal discernment about one's vocation to religious life. It is also a time for mutual experience and knowledge necessary for both the candidate and the Institute to come to the decision about admission into the novitiate.¹²³ Candidacy is a flexible period, with no formal commitment made between the candidate and the Institute, with a programme specifically adapted to the needs of the candidate. Candidacy may entail either residence in a house of the Institute or regular contact with the Institute.¹²⁴

The director is to introduce the candidate[s], in a general sense, to the way of life of the Institute: its charism, spirituality, community life and its apostolates. The programme is also to

¹²⁰ See *Formation Handbook*, 20-26.

¹²¹ See *IBVM Constitutions*, 5.11-5.13. See also *Formation Handbook*, 17-18.

¹²² See *IBVM Constitutions*, [98] and 5.13.

¹²³ *Formation Handbook*, 31: "The aim [of candidacy] is to provide the candidate with sufficient time and opportunity to get to know the Institute in a particular cultural context, and for the members of the Institute to get to know the candidate."

¹²⁴ See *IBVM Constitutions*, 5.14. See also SCHNEIDERS, *Selling All*, 30.

include faith formation and spiritual exercises, ecclesial awareness, human development, cultural and social consciousness. The General Examen is the key guiding inspiration in the candidacy programme. The task of the director is to accompany the candidate in her growth and discernment, assess her suitability for novitiate in terms of freedom, peace and aptitude necessary for religious life. The director also collects and retains the personal data of the candidate, updates the province leader on the candidate's progress and makes recommendation for admission to the novitiate. If judged suitable, the director accompanies and guides the candidate through the process of transition to the novitiate.¹²⁵

The third phase is the novitiate which is considered as the formal beginning of life in the Institute.¹²⁶ Novitiate is a period marked with a combination of formation experiences which include: prayer, examen, reflection, accompaniment, evaluation and discernment.¹²⁷ These are aimed at helping the candidate to be integrated into the spirituality, life, charism and mission of the Institute and to come to a decision to make temporary profession.¹²⁸ The task of the director is to implement the programme with suitable adjustments to individual needs of the candidates, to accompany them in their discernment, assess their suitability for vowed life in the Institute and recommend them for admission to profession to the province leader after ascertaining that all canonical requirements and conditions are in place.¹²⁹

The novitiate formation process follows the Ignatian formation model which is a combination of experience, reflection, accompaniment and evaluation. The key elements of the

¹²⁵ See *Formation Handbook*, 39.

¹²⁶ See *IBVM Constitutions*, 5.16.

¹²⁷ See *ibid.*, 5.17.

¹²⁸ See *Formation Handbook*, 45.

¹²⁹ See *ibid.*, 53.

novitiate programme include prayer, Ignatian spirituality, human and faith development, and study of the spiritual patrimony of the Institute, with emphasis on the historical development of the identity of the Institute.¹³⁰

The fourth phase of formation is the period during temporary vows.¹³¹ Proper law refers to it as a crucial stage of growth and development into the life of the Institute.¹³² The aim of formation during the period of temporary vows is to help the member be integrated into the life and mission of the Institute and to test her vocation in an experiential context.¹³³ During this period, the member participates in the life of the Institute by engaging actively in the Institute's mission through study or ministry.¹³⁴ She contributes to her own formation by her growing ability to reflect on her life experience. She continuously evaluates and discerns the movements of the Spirit of God in her life, in her resolve to reach the final decision of making perpetual profession.

The role of the director and those involved in formation of members in temporary profession is that of guiding, accompanying, discerning with the candidate on her vocation and assessing her suitability for a lifelong commitment in the Institute.¹³⁵ Readiness for perpetual vows is to be demonstrated by the evidence of integration of the human, spiritual, communal and

¹³⁰ See *ibid.*, 49-52.

¹³¹ See *IBVM Constitutions*, 5.31.

¹³² See *Formation Handbook*, 61.

¹³³ See *ibid.*

¹³⁴ See *ibid.*

¹³⁵ *IBVM Constitutions*, 5.32: "During this time, the director of temporary profession guides the member, who is enriched by a diversity of community living situations, formation programs and the experience and example of others."

ministerial dimensions of the candidate's life as a member of the Institute.¹³⁶

The fifth phase of formation in the Institute is tertianship.¹³⁷ The Institute regards the tertian programme as an integral element of formation. The programme, referred to as “the school of the heart,” is normally taken after at least ten years following perpetual profession.¹³⁸ The programme aims at helping the tertian towards personal renewal and review of the life and commitment of the member to the mission of the Institute. She deepens her knowledge of the Institute and her role in contributing to its growth and development. Following the Ignatian model of formation, the programme combines the Ignatian spiritual exercises, reflection on the charism, history, the Constitutions and spirit of the Institute. It also involves engaging in an apostolic experience, especially one which involves being with those on the margins of society.¹³⁹

The last phase of formation is the ongoing formation after perpetual vows. The Institute recognizes the significance of lifelong formation of members, as envisioned in canon 660. For the personal wellbeing, apostolic updating and effectiveness, spiritual renewal and continued fidelity required for the good of the Institute and its mission members are obliged to assume responsibility for their own ongoing formation.¹⁴⁰ This requires periodic evaluation of one's life, taking initiative to discern formation needs with those in leadership and to request opportunities and time for such formative experiences, normally at ten-year intervals. As important elements

¹³⁶ See *ibid.*, 5.37; *Formation Handbook*, 80-81.

¹³⁷ Note that the current understanding of tertianship in the Institute differs from what was practiced by the former North American Branch where it was regarded as a period of preparation for perpetual vows and included the spiritual exercises and apostolic experience in a challenging or poor environment, of which the member had no prior experience. See Constitution 77, in *Constitutions of the IBVM (Toronto)*, Toronto, IBVM, 1986.

¹³⁸ *IBVM Constitutions*, [516] and 5.40.

¹³⁹ See IBVM, *Tertianship Guidelines*, Rome, IBVM, 2014.

¹⁴⁰ See *IBVM Constitutions*, 5.44.

of the on-going formation, the Institute recommends studies in theological and secular fields, regular spiritual reading, mentorship in one's area of specialization and continuous study of the charism of the Institute.¹⁴¹

3.3. Formation during the Period of Temporary Vows

This section discusses the guidelines and norms presented in the proper law of the Institute of the Blessed Virgin Mary with regard to the formation of members during the period of temporary vows. It treats the aims and components of the programme, the tasks of those involved with the member, the manner of reviews, the conclusion of the period of temporary vows and readiness for perpetual profession.

3.3.1. Essential Elements of the Programme of Formation during the Period of Temporary Profession

The proper law of the Institute considers the period during temporary profession as a crucial stage of further growth and development for the new member. By virtue of its formative and probationary nature, the structure and programme of formation during temporary vows is aimed at helping the member to experience the life, mission and spirit of the Institute and to test her vocation in this experiential context. It is also to help the member to learn how to integrate the human, spiritual, communal and ministerial dimensions of her life as a member of the Institute. By means of ongoing discernment, the undertaking of the formative experiences and accompaniment by those involved in her formation, the member is helped to come to a decision

¹⁴¹ See *ibid.*, 5.45- 5.47.

regarding her vocation to the Institute.¹⁴²

The pedagogy of formation during temporary profession stresses the active involvement of the member herself. Based on the Ignatian principles of formation,¹⁴³ the formation programme for the period during temporary vows is a balanced and flexible curriculum, designed in accordance with the specific needs of the member. The Institute emphasizes discernment in the formation process of the temporarily professed. The programme therefore is to be designed in such a way that it helps the member to test her vocation in a reflective discernment environment, in the context of experience of the vowed life in the Institute. Accordingly, the formation process includes study, practice of the Ignatian spiritual exercises and involvement in the Institute's life and mission.

The programme has the following six components: spiritual formation, personal and psychological development, community living, ministerial training, ministry experience, and, lastly, international experience.¹⁴⁴

With regard to spiritual formation, the Institute places emphasis on the deepening of spiritual life by means of the practice of the Ignatian spiritual exercises, study and reflection on

¹⁴² See *ibid.*, 5.32-5.34. See also *Formation Handbook*, 61-62.

¹⁴³ Howard Gray outlines the Ignatian principles of formation as: the Ignatian spiritual exercises (spiritual exercises designed by Saint Ignatius of Loyola), discernment inspired by gospel values, adaptation and evaluation. The Ignatian spiritual exercises are the pathway to finding God and His will in one's life. In the context of formation, it is the orientation on the most helpful way of prayer. Discernment leads towards choosing among many possible goods the specific good which God wills for a person in view of his or her circumstances, abilities, time and place. For those in formation, it is a continuous process of discovering if the life in the Institute is the will of God for them. Adaptation is the ability to fit the good chosen in the process of discernment into the personal context of specific social, cultural, and psychological realities. Adaptation is essential in the life of the Institute and its ministerial effectiveness. Evaluation which is mainly carried out through discernment and Ignatian spiritual exercises highlights the spiritual disposition of the person towards the mission and life in the Institute. It points out the motivation, the capacity for flexibility and adaptability necessary for answering the apostolic demands. See GRAY, "The Ignatian Mission," 29.

¹⁴⁴ See *Formation Handbook*, 62-66.

lived experience and fidelity in prayer.¹⁴⁵ This involves familiarization with the spiritual patrimony of the Institute, the study of contemporary ecclesiology and theological development. The aim of spiritual formation is to help the member develop a deeper understanding and appreciation of the mission and life of the Institute in the ecclesial context and to fulfill the related duties with fidelity.¹⁴⁶

The second component of the temporary profession programme implicates personal and psychological development. As a vowed member in the Institute, the sister in temporary vows is required to participate in the life and apostolates of the Institute. This entails human interactions and interpersonal relationships. Community life and ministry will expose her to different kinds of persons in terms of age, personality, and their cultural and racial background. This implies the ability to relate to different people with maturity and ease and calls the temporarily professed member to a continuous deepening of her self-knowledge in the spiritual, social, psychological, emotional, sexual and physical dimensions of her life.¹⁴⁷ Useful resources to achieve the above mentioned objectives would include courses, workshops, therapy sessions, counselling and opportunities for exercising responsibility and leadership skills in a variety of contexts in the Institute.¹⁴⁸

¹⁴⁵ See M.G. NWAGU, “Religious Life in Nigeria Today,” in *RfR*, 52 (1993), 262 where the author remarks that spiritual awareness that is rooted in union with God in prayer is indispensable from the interior harmony aimed at by formation. She observes that the current candidates for religious life are drawn from the contemporary society which is more than ever impoverished as to conscious spiritual values. She argues that religious institutes therefore have to emphasize a deeper spirituality, especially among their members in formation which will in turn aid them in rendering genuine and fruitful evangelical witness.

¹⁴⁶ See *ibid.*, 64. See *IBVM Constitutions*, [360-363].

¹⁴⁷ James P. Burns explains that a good human formation for those being prepared for orders and religious life should involve an integrated approach in sexuality formation which incorporates the key elements, such as “education, human growth and development, and spirituality” (J.P. BURNS, “Sexuality Formation for Church Leaders,” in *Human Development*, vol. 32, no. 1 [2011], 12).

¹⁴⁸ See *Formation Handbook*, 63.

The third component points to community experience. The proper law of the Institute recognizes the reality of varied models of living in community.¹⁴⁹ The emphasis is placed on formation which helps a member to understand the theological and sociological meaning of religious community as a bond or union of hearts and minds which goes deeper than physical common life together. The requirement is that the member in temporary vows is helped to learn how to live in community through experiencing a variety of types of community groupings.¹⁵⁰

The fourth component is ministerial preparation by means of professional training. The member is expected to undertake some form of ministry in the Institute which requires some professional studies either as initial ministerial training or further training according to the ministerial needs of the Institute. It is also a requirement in the Institute that before perpetual profession the member undertakes some form of theological studies at least for one year.¹⁵¹

The principles guiding discernment for ministerial training in the Institute are based on the kind of study to be undertaken and its duration, the needs of the Institute and of the province, and the aptitude of the member. Such training forms a part of the ongoing formation process and probation of the member and proper law indicates that, in case of necessity, such studies may be continued after perpetual profession. During the period of such studies, a member is to be free from all ministerial responsibilities except during vacation periods when some works which are relevant to the area of study may be assigned to her.¹⁵²

The fifth component consists of ministerial experience. As a member of the Institute, the

¹⁴⁹ The Formation Handbook identifies the models of living arrangements currently practiced in the Institute as: large or small groups, individually or inter-congregationally. See *ibid.*, 64. Cf. S. SCHNEIDERS, "Formation for New Forms of Religious Community Life," in *The Way Supplement*, 62 (1988), 63.

¹⁵⁰ See *ibid.*, 64.

¹⁵¹ See *ibid.*

¹⁵² See *ibid.*, 65.

sister in temporary vows is required to engage in ministry for the duration of at least one year before the final vows. This may involve working with other members of the Institute, collaborating with those outside the Institute or, in some cases, it may be a ministry where she is alone.¹⁵³ As part of formation, the programme entails the need for some direct exposure of the sister to people on the margins of society that she learns how to respond to unjust social structures or situations by means of theological reflection, analysis, and affirmative and transformative actions.¹⁵⁴ At this stage of formation, she also requires an understanding of the principles of inculturation, dialogue and collaboration. Useful resources for ministerial effectiveness include the regular support of a professional supervisor, training in media and communications, familiarity with civil and canon law, current ethical policies and matters of human rights, especially of the vulnerable (such as children).¹⁵⁵

The last component of the programme of formation during temporary vows is an international experience. Being an international and multicultural Institute, the exposure, knowledge, understanding and appreciation of different cultures have always been emphasized as a way of promoting unity in diversity.¹⁵⁶ Before perpetual profession, it is encouraged that members in temporary vows gain some international experience through formal studies in another province, international Institute meetings, visits or study of another language. The aim of international experience is to help those in temporary vows to develop a real awareness of the inter-culturality of the Institute. It is also to aid them in appreciating the unity that exists across the Institute as one body despite the diversity of cultures, and in developing skills and attitudes

¹⁵³ See *ibid.*

¹⁵⁴ See *IBVM Constitutions*, 2.8.

¹⁵⁵ See *Formation Handbook*, 11, 65-66.

¹⁵⁶ See *IBVM, Inter-Cultural Handbook*.

necessary for multicultural living.¹⁵⁷

3.3.2. Responsibilities of Those Involved in Formation during the Period of Temporary Vows

The proper law of the Institute identifies two categories of persons involved with formation of the member during temporary vows. The first group comprises those who are directly involved in the formation process: the director of temporarily professed and the local and province leaders.¹⁵⁸ The second group consists of those who help facilitate the formation of the member. Such persons are members of the Institute who interact directly with the member in sharing ministry or community living, the spiritual director, the ministry supervisor, the study assistant, therapists and the peers in temporary profession.¹⁵⁹

The main tasks of those involved in the formation of the member in temporary vows are offering support, accompaniment and encouragement, with the aim of helping the member profit from the programme and attain the inner freedom to make the decision regarding final commitment.¹⁶⁰

The responsibility of the community leader towards the temporarily professed member is both pastoral and administrative in nature. As one who lives with the member on a daily basis, the community leader has the task of facilitating a conducive and formative community

¹⁵⁷ See The Institute Report 2006-2014 Booklet, 23, in CPAT, Box 91.

¹⁵⁸ See *Formation Handbook*, 67-71.

¹⁵⁹ See *ibid.*, 73-73.

¹⁶⁰ *Ibid.*, 67: “Temporary profession is seen as a special time of formation with opportunities for growth and discernment, culminating in the decision to make a permanent commitment within the Institute. During this time, because of the number of people involved in this stage of formation, it is important that the processes and areas of communication and accountability in relation to the province leader, the community leader and the director of the temporary professed be clearly outlined.”

characterized by an atmosphere of trust, confidence and freedom in which the member can be encouraged and challenged. This is aimed at helping the member in temporary vows to be one integrated in the life of the Institute in the context of community life.

The community leader has the duty of fostering a type of community life which demonstrates a reflective faith-filled and responsible life environment where members express mutual care, support and love. Such a community provides the member in temporary vows with the opportunity to gain the freedom and confidence necessary for taking personal responsibility for interdependent living in community. It also gives the environment for deepening her integration into the life of the Institute and for developing skills in a mature way of living vowed life. The community leader guides and advises the temporarily professed member in matters related to life in community, ministry, studies, vacations and personal budgeting. She also writes the annual review of the member which includes comments on observable behaviour patterns. She voices encouragement, identifies challenges and helps the member set realistic goals with regard to growth. The community leader maintains frequent and open communication and contact with the director of temporarily professed and the province leader regarding the progress of the temporarily professed member.¹⁶¹

The responsibility of the province leader towards the member in temporary vows is mainly administrative. Besides those responsibilities toward all members specified in Constitutions 6.73-6.77, the province leader has the duty of providing the necessary support to the temporarily professed member, judging and discerning her suitability for the life in the Institute and admitting her to perpetual profession and to renewal of vows.¹⁶² In this regard,

¹⁶¹ See *ibid.*, 65.

¹⁶² See *ibid.*, 67; *IBVM Constitutions*, 6.74, 5.35.

consultation with the community leader and the director of temporarily professed is highlighted. The province leader designs the structure of accountability and of coordination of those involved in the formation of the temporarily professed member.¹⁶³ The province leader also assigns the temporarily professed sister to ministry or sends her for studies.¹⁶⁴

The Institute *Formation Handbook* outlines the role, the skills required, the manner of appointment and of preparation and the resources required for the office of director of temporarily professed.¹⁶⁵ She is appointed according to Constitution 5.10.¹⁶⁶ To be eligible, a member must be in perpetual vows for at least five years.¹⁶⁷ She requires adequate training for her job in such areas as the spiritual patrimony of the Institute, the Constitutions and Scriptures. The director is to have listening and basic counselling skills, skills for discernment and spiritual accompaniment, capability for good perception and sound judgment, the ability for maintaining confidentiality and capability for teamwork. She is also to have a fair understanding of the culture and worldview of members in temporary vows in relation to their understanding of the Church and of the world. In her work, the director requires the support of the province leadership and members of the province, sufficient time to fulfill the demands of the office without undue stress, regular meetings with the province leader and the formation team, a realistic budget and

¹⁶³ See GAMBARI, *Adult in Christ*, 211, where the author explains that it is the prerogative of the competent major superior to establish the appropriate organization of the formation structure of members in temporary vows aimed at helping them achieve the necessary synthesis of life.

¹⁶⁴ See *Formation Handbook*, 67; *IBVM Constitutions*, 6.74.

¹⁶⁵ See *Formation Handbook*, 69-71.

¹⁶⁶ *IBVM Constitutions*, 5.10: “[...] the director of temporary vows [is] appointed by the Institute leader with the consent of her council, after appropriate consultation. [...] the term of office is three years, renewable twice successively.”

¹⁶⁷ See *ibid.*

opportunity for participation in international and inter-congregational meetings.¹⁶⁸

The main task of the director is to execute the programme. This she does by organizing regular meetings for those in temporary vows in the form of talks, workshops and conferences. She is also to organize the cross-cultural experiences for the members in temporary vows. When necessary, she may modify the programme to suit the circumstances and the needs of the temporarily professed member.

On an individual level, the director has the duty of accompanying the member in personal discernment with regard to her vocation.¹⁶⁹ The director is to offer support and also challenge and affirm the member, all in order to help deepen her ability to discern in a reflective way and to integrate into the Institute. The director is also to help the member in acquiring skills for interpersonal relationships.¹⁷⁰

The administrative role of the director is to keep all the personal data of the members in temporary vows in accordance with the stipulations of secular and ecclesiastical norms. She is to maintain regular communication with the community and province leader on the progress of the member and is to ensure that appropriate persons write the annual reviews for the member in temporary vows and that these reports are submitted to the province leader and her council on schedule.¹⁷¹

The second category of persons involved in the life of the temporarily professed member

¹⁶⁸ See *Formation Handbook*, 70.

¹⁶⁹ Molinari notes that the work of formation is first and foremost the initiative of the Holy Spirit from whom divine vocation originates. This is to be the fundamental and guiding principle for those involved in the work of formation. They are to consider themselves more as collaborators in what God himself is doing in the person in his or her vocation journey. See P. MOLINARI, "The Initial Stages of Formation," in *The Way Supplement*, 41 (1981), 43. See also GAMBARI, *Adult in Christ*, 207.

¹⁷⁰ See *Formation Handbook*, 69.

¹⁷¹ See *ibid.*

includes those who interact with her directly, either in ministry or in community. They have a formative and probationary role with regard to the temporarily professed. As the latter's relationships both in community and ministry expand, she needs to be encouraged and helped to deepen her self-knowledge in the spiritual, social, psychological, emotional, sexual and physical aspects of her life. She may also greatly benefit from interactions with the people outside of the formation group.

The role of members of the Institute whom the temporarily professed sister may encounter as members of her local community is highlighted. Those who interact with the sister in temporary vows have a dual duty. The first is the obligation for all to contribute to the formation of younger members, and the second is the duty of providing a conducive formative community which offers the temporarily professed member the focus for deepening of personal, ministerial and faith experiences by means of mutual support and challenges necessary for personal growth.¹⁷² Community members have a duty to foster an apostolic community life, characterized by regular sharing of faith, personal, spiritual and apostolic experiences, commitment to fraternal love and respect for individual differences. When necessary, some community members may participate in the evaluation process of the sister in formation.¹⁷³

The spiritual director helps the temporarily professed to discern the movements of the Spirit as she grows in her vocation.¹⁷⁴ Spiritual direction is also a means of deepening her

¹⁷² See *ibid.*, 72.

¹⁷³ See *ibid.*

¹⁷⁴ Agostin Lovatin identifies the role of a spiritual director as that of aiding the one being directed to recognize the action of God in his or her soul and to help him or her to respond adequately. He however recognizes that all spiritual growth is the action of the Spirit of God and like the Old Testament prophets or John the Baptist, the spiritual director is only a pointer to the direction God is leading a person. See A. LOVATIN, "Novitiate Formation," in *R/R*, 38 (1979), 807-809. In addition, Sandra Schneiders explains that in the context of formation, spiritual direction is an indispensable part of the process of discerning one's vocation before God. She therefore proposes that all institutes ensure that members, especially those in formation, have access to good spiritual directors whose

understanding and appreciation of Ignatian spirituality.¹⁷⁵ Besides the spiritual director, the temporarily professed sister may also have recourse to counselling or therapy to address some specific concerns or issues which require ongoing attention and healing or correction of some patterns of behaviours. In both spiritual direction and counselling experiences, confidentiality is to be maintained.¹⁷⁶

The temporarily professed may also require a ministry supervisor or mentor, especially in ministries which are new to her. When a temporarily professed sister is involved in ministries related to spiritual direction, chaplaincy or counselling, it is highly recommended that she be supervised regularly.¹⁷⁷ In certain circumstances, for instance when a member in temporary vows is sent for studies in another country and in a foreign language, or in a country where members of the Institute are not present, she may require a study assistant in matters specifically related to her education.¹⁷⁸

Lastly, the contribution of fellow peers in temporary vows is a means of mutual support and encouragement. As Gambari notes, authentic friendship cultivated among peers in religious life is of much benefit to the formation process as it enhances collaboration, dialogue and mutual learning.¹⁷⁹ The director is to organize regular meetings and opportunities for the temporarily

spiritual role will have a positive impact on their spiritual development. She cautions that the role of a spiritual director may not be replaced or confused with that of the formators as both are distinct in their purpose. For the choice of a spiritual director for religious, she recommends a committed and practicing Catholic and likewise, a spiritually and psychologically mature person who has good understanding of religious life and of the particular institute. Preferably, Schneiders suggests that spiritual directors for those in formation should be known and approved by those in charge of formation. See SCHNEIDERS, *Selling All*, 52-53.

¹⁷⁵ See *Formation Handbook*, 69.

¹⁷⁶ See *ibid.*, 74.

¹⁷⁷ See *ibid.*, 73.

¹⁷⁸ See *ibid.*

¹⁷⁹ GAMBARI, *The Religious Adult in Christ*, 246.

professed members to help them reflect and share with one another their experiences. In provinces where the temporarily professed sister is alone, international and inter-province experiences are of great significance for support and enrichment.¹⁸⁰

3.3.3. Review Process for Renewal of Vows

During the period of temporary vows, the proper law of the Institute requires that there be periodic evaluations and annual reviews of the formation process.¹⁸¹ This is to help the member continually discern her vocation and to ascertain whether her commitment to the mission of the Institute is still central to her life.¹⁸² It is from the feedback of the reviews that those in charge of formation are able to guide the temporarily professed and help identify those aspects in her life which require further attention and growth. The review process is regulated by principles of confidentiality, respect for the member's dignity and privacy, and her active participation in the process. The review process involves evaluation of the key areas of the Institute's way of life, which are: vocation, charism, spiritual life, ministry, life in community, health and interpersonal relationships with others.¹⁸³ The evaluation of the member, as the handbook states, is based on "observable behaviours and patterns, not on interpretations."¹⁸⁴ Those who participate in the review process include the sister herself, the director of temporarily professed, one other member of the Institute, preferably someone who has direct interaction with her either in ministry or in

¹⁸⁰ See *ibid.*

¹⁸¹ See *ibid.*, 74.

¹⁸² See *IBVM Constitutions*, 5.34

¹⁸³ See *Formation Handbook*, 74.

¹⁸⁴ *Ibid.*, 75.

community life, and the province leader. In certain cases, the director at her discretion may request other members of the Institute or persons outside the Institute working or studying with the member to take part in the review.

The procedure requires that the written reviews be given to the member to read and make comments if she so wishes. She then signs the “consent form.”¹⁸⁵ The reviews are then sent to the province leader who, after discussing them with her council, writes a response to the member and gives a copy of the same to the director. The reviews and response are then sent to the Institute leader who may send feedback to the province leader, especially on issues which require follow up with the member.¹⁸⁶

In certain cases, the reviews may indicate the need for therapy or professional counselling, especially on some recurring concerns of growth or issues of behaviour patterns. Sometimes the reviews indicate serious doubt concerning the suitability of the member for religious life. Such concerns are to be communicated to the member, both verbally and in writing, with clear indications of the areas of difficulties and a structure put in place for her to work on these concerns within the timelines for final decision.¹⁸⁷ If the efforts of the member demonstrate positive growth and transformation of behaviour, within the required period of temporary vows, she is to be allowed to proceed. However, if doubts concerning her suitability for the life of the Institute persist throughout the entire period of temporary vows, she is to be discontinued from further profession. It is a grave injustice for both the member and the Institute to admit someone to profession when there is evidence of ongoing serious doubts of suitability

¹⁸⁵ The consent form is a document drawn up by the Institute which a member in initial formation signs to confirm that she has received, read and understood the contents of the reviews written by those designated to do so. She may not necessarily agree with what has been written in the reviews.

¹⁸⁶ See *Formation Handbook*, 75.

¹⁸⁷ See *ibid.*

for religious life.¹⁸⁸

The proper law in accord with the universal law, requires that during the period of temporary vows, in order to renew her vows, a sister makes a formal written request to the province leader. With the consent of the provincial leader's council, the province leader admits her to profession.¹⁸⁹ After having consulted the director of temporarily professed, the province leader determines the duration of the subsequent period of temporary profession (one, two or three years) and the pattern of renewal of vows, depending on the individual's readiness. After renewal of vows, the member signs the official record form to this effect. Both the form and the minutes of the province council meeting are sent to the Institute's secretary and a copy kept in the province secretary's file.¹⁹⁰

Throughout the period of temporary profession, all information and any other confidential material regarding the member are treated with utmost confidentiality, according to canonical and civil norms and the Institute's Privacy Policy. The information is kept in the member's "sealed file" to which the member¹⁹¹ and authorized persons in the Institute¹⁹² have a right to access,¹⁹³ while all material whose purpose has been accomplished is to be destroyed. If and when necessity requires, proper law also permits a legitimate third party to access or release personal information of members. The province leader keeps a summary file of the contents of

¹⁸⁸ See *ibid.*

¹⁸⁹ See *IBVM Constitutions*, 5.35.

¹⁹⁰ See *Formation Handbook*, 77.

¹⁹¹ See *IBVM*, Privacy Policy, no. 4, in *Formation Handbook*, 90.

¹⁹² See *ibid.*, no. 16, in *Formation Handbook*, 92.

¹⁹³ See *ibid.*, nos. 9 and 18, in *Formation Handbook*, 90.

the “sealed file” about which she informs the succeeding province leaders.¹⁹⁴

3.3.4. Conclusion of the Period of Temporary Vows and Readiness for Perpetual Profession

The main goal of formation during the period of temporary vows is to help the member attain the maturity and freedom necessary for permanent commitment in the Institute. It is also to give sufficient time for a mutual decision of both the member and the Institute regarding the perpetual profession. At the end of the period of temporary vows, the sister is to demonstrate the capacity to live the life of the Institute fully and to carry out its mission effectively.¹⁹⁵

At the expiry of the complete period of temporary vows, the proper law of the Institute specifies three ways by which it may be brought to conclusion. The end of the whole period of temporary profession may be concluded either by admission to perpetual vows, refusal of admittance to further profession or by voluntary departure from the Institute.¹⁹⁶

Admission to perpetual profession means that the member has been judged by the Institute, through its designated agents, as suitable for life-long commitment. This also implies that the member has fulfilled all the conditions required by both the proper and universal law and, in the process of discernment, both the member and the Institute have freely reached the mutual conclusion that the member qualifies for admission to permanent membership.¹⁹⁷

The member seeking admission to perpetual profession is to make a formal request in

¹⁹⁴ See *Formation Handbook*, 77.

¹⁹⁵ See *IBVM Constitutions*, 5.37.

¹⁹⁶ See *ibid.*, 5.36; *Formation Handbook*, 77.

¹⁹⁷ The yardstick of readiness for perpetual profession is proof of a greater sense of maturity by means of integration of life, a sign of contentment and happiness with the choice of life on the side of the member. It also means that the member has demonstrated a conscious identity as a religious, a deeper understanding and appreciation of the vows, a sense of belonging to the Institute, commitment and interest in the Institute’s affairs and ministry, a spirit of availability, flexibility and adaptability with regard to being sent by the Institute leaders. See *Formation Handbook*, 80-81.

writing to the province leader asking for permission to be allowed to apply for perpetual profession.¹⁹⁸ With a positive collegial response from the province leader and her council,¹⁹⁹ the member makes a formal application to the Institute leader who, after having reached positive judgment of the candidate's suitability and with the consent of her council, admits the member to make final profession.²⁰⁰

The member then begins her long-term preparation which usually lasts a year. During this period, the member undertakes some form of spiritual exercises and formative experiences according to the judgment of the director who accompanies her more closely, especially in her ongoing discernment. The last two months of immediate preparation include a ten day retreat and the practical preparation for the profession ceremony.²⁰¹ The member then makes her perpetual profession according to the formula in Constitution 5.29 or 5.30 according to a member's preference. The ceremony is celebrated in the context of the Eucharistic liturgy and the vows are received by the Institute leader or her delegate.²⁰² The member and leader who receive her vows sign an official form to this effect. A copy is to be kept in the province office and another sent to the Institute secretary.²⁰³

If a temporarily professed member is not admitted to perpetual profession, the decision of non-admittance should be made, if possible, only after appropriate help and timely warnings to

¹⁹⁸ See *ibid.*, 82.

¹⁹⁹ See *ibid.*

²⁰⁰ See *IBVM Constitutions*, 5.37-5.38.

²⁰¹ See *Formation Handbook*, 82.

²⁰² See *ibid.*, 83.

²⁰³ *Ibid.*

the member have proved ineffective.²⁰⁴ The member may also depart freely from the Institute during or at the end of the period of temporary vows.²⁰⁵ In case of either voluntary or involuntary departure from the Institute, proper law requires that careful documentation and safekeeping of all the information is carried out in accordance with the stipulations of both civil and canon law.²⁰⁶ The former member, by the fact of being separated from the Institute, is relieved of the all rights and obligations arising from incorporation.²⁰⁷ The Constitutions, however, instruct that the departing member leaves with as much consolation and peace as possible, that charity is shown her and her dignity not violated at any stage of the process.²⁰⁸ All that personally belongs to her, including her patrimony, is restored to her in accord with the provisions of the Institute's *Finance Handbook*.²⁰⁹

The Institute allows for re-admission of those who legitimately depart. However, re-admission is to be preceded by a thorough discernment and a positive judgment of suitability by the Institute leader, together with a formal request for admission by the former member and recommendation by the province leader. The re-admitted member is to undergo a period of

²⁰⁴ See *Formation Handbook*, 78.

²⁰⁵ See *IBVM Constitutions*, 5. 36. Cf. c. 688 § 1

²⁰⁶ See *Formation Handbook*, 79. Morrissey recommends that documents which could be derogatory to a person's reputation, for instance, those relating to moral issues and criminal cases, are not to be retained unless it is absolutely necessary to do so for reasons like dismissal from the institute which may be disputed by the former member at a later date. See F.G. MORRISEY, "The Issue of Confidentiality in Religious Institutes," in P.J. COGAN (ed.), *Selected Issues in Religious Law*, Washington, DC, CLSA, 1997, 131.

²⁰⁷ See *IBVM Constitutions*, [233] and 6.98; c. 692.

²⁰⁸ See *IBVM Constitutions*, [222-227] and 6.100. Cf. E. McDONOUGH, "Dispensation and Dismissal," in P.J. COGAN (ed.), *Selected Issues in Religious Law*, Washington, DC, CLSA, 1997, 45. The author explains that in the context of formation of the temporarily professed, justice requires that causes for exclusion from renewal of profession are just and that they are directly connected to the substantive content of the formation programme as is prescribed in the proper law of an institute.

²⁰⁹ See *IBVM, Finance Handbook*, Rome, IBVM, 2011. See also *IBVM Constitutions*, 6.99.

probation whose length and format is to be determined by the Institute leader.²¹⁰

Conclusion

The chapter has presented the norms and principles guiding the formation of temporarily professed members in the Institute of the Blessed Virgin Mary in the context of the historical antecedents of the Institute and the overall structure of the formation programme.

Formation, understood as a means of preparation for mission, is based on the original vision of Mary Ward and her model of religious life, a new enterprise in the Church, which diverted from the traditional cloistered life which characterized all religious orders of women of her time. Historical antecedents of the Institute show that the growth and development of the Institute was marked with constant challenges and uncertainties. These called for fidelity to the Institute, dependence on the providence of God and fortitude on the part of the Foundress' companions. Formation, based on the Ignatian principles, was therefore to prepare the members to be women who were singled-minded, flexible, detached from all that might hinder them from serving the mission of the Institute, and persons able to integrate apostolic and spiritual life. The growth and expansion of the Institute up to its present structure have given insight on some challenges with regard to formation, especially of the temporarily professed, and the efforts of the Institute to respond to them.

The study of the provisions of the proper law on formation of the temporarily professed members of the Institute of the Blessed Virgin has presented post-novitiate formation as a process of ongoing discernment for suitability for perpetual commitment in the experiential context of life and mission of the Institute. The programme, administered mainly by the director, is to help the member to be well acquainted with spirituality and the vowed life of the Institute,

²¹⁰ See *Formation Handbook*, 79. See also *IBVM Constitutions*, [242] and 6.102.

and to deepen personal and psychological growth. The programme also aims at according a temporarily professed an experience of a variety of models of community life, an opportunity for ministerial preparation and apostolic experience, and where possible, an exposure to an international setting before taking final vows.

The programme includes the review process and evaluation for renewal of vows and for judging suitability for perpetual commitment. It also specifies the local community leader, the director and the province leader as those directly involved in the formation of the temporarily professed member. They coordinate the formation process and participate in the discernment and the review process with the member. Other persons involved with the member either in ministry or community, include the spiritual director, ministry supervisor, study assistant, therapists and the peers in temporary vows.

The chapter has presented the present structure of the formation programme of the Institute of the Blessed Virgin Mary based on gospel values, Mary Ward's charism and the Ignatian principles of formation. The programme expresses the effort of the Institute to provide an integrated formation for its members, in accord with the purpose of the Congregation. Throughout the history of the Institute, there has been continuous effort towards the evaluation and revision of the formation programme to suit the ever changing realities and needs of the Institute and of the Church.

With regard to the structure of formation of the temporarily professed, as the chapter has revealed, there are some aspects which appear to require updating and modifications, calling for new approaches to formation. The next chapter, therefore, will point out some of the areas which require re-evaluation and where possible, updating.

**CHAPTER FOUR: ASSESSMENT OF CONFORMITY IN THE
IMPLEMENTATION OF PROPER LAW OF THE INSTITUTE OF THE BLESSED
VIRGIN MARY (LORETO SISTERS) TO THE UNIVERSAL LAW ON FORMATION
DURING THE PERIOD OF TEMPORARY VOWS**

Introduction

The analysis of the norms on formation during the period of temporary vows presented in Chapter Three of the study, demonstrates their general conformity to the norms of the universal law. However, there are certain stipulations of the proper law with regard to formation which seem to require updating and greater attention in their application. The reasons for this might be attributed to the changes in the realities and constantly emerging new needs of the Institute and of the Church and, also, due to inadequate application of certain norms.

This chapter, therefore, evaluates the extent to which the application of the proper law by the Institute fulfills the aims of formation during the period of temporary vows as required by universal law. It also attempts to identify those aspects of the programme of formation which may require updating in content and pedagogy, in view of offering some suggestions on how such gaps may be bridged. Lastly, the chapter offers recommendations for re-evaluating certain norms of universal law on formation during the period of temporary profession.

The chapter is divided into three sections. Section one discusses those aspects of formation during the period of temporary vows which demonstrate some discrepancies between the application of proper law and universal norms and those which require updating. These aspects concern the content and the structure of the formation programme. The second section presents suggestions on some aspects of the life of the Institute which should be accorded greater

attention for a more enriching formation programme for the temporarily professed members. The last section proposes future revision of certain canons connected to the formation of religious in temporary vows.

4.1. Aspects to Be Considered in the Content of the Formation Programme of Members in Temporary Vows

Due to the emergence of new realities both in the Institute and the Church, new needs have appeared which in turn have motivated the reconsideration of some aspects in the content of the formation programme. Secondly, analysis of the proper law of the Institute on formation reveals some inadequacy in the application of some norms. Consequently, with regard to the new phenomena, particular attention is to be given to the matter of: temporal goods, necessary discretion in the use of social means of communication, structures of authority and governance in the Institute and cultural studies. On the other hand, those matters which require adequate application include the study of mariology, familiarity with the Holy See documents, and contemporary theological and spiritual publications on consecrated life.

4.1.1. Temporal Goods in the Institute

Recalling the goal of post-novitiate formation which is to live the life of the Institute more fully and fulfill its mission more effectively, it is important that sisters in temporary vows know and understand the capacity of the Institute to fulfill the temporal needs of its members. Such knowledge is not only crucial for the process of discernment for lifelong commitment but also for achieving a more fruitful contribution to the temporal wellbeing of the whole institute by

the younger members. In other words, when those in temporary vows are educated on the question of stewardship of temporal goods in the Institute a sense of desire for apostolic fruitfulness and responsible care of institute resources will be instilled in them.

In the past, stewardship of temporal goods may not have required so much attention during the formation of members. This could be attributed to a well-structured administration system, coupled with the availability of personnel from among the sisters already possessing the necessary skills for the task or the capacity to be trained in this regard. Traditionally in the Institute, issues of finance and resources were generally left to the Institute treasurers and superiors. Members received this information mainly through financial reports presented by the treasurers at province assemblies or at chapters. However, the need for training in temporal goods is becoming more and more important nowadays due to several reasons.

The first is the increasing number of incidents of malpractice in the administration of resources of public juridic persons in the Church.¹ On the same note, occasions of fraud and misappropriation of goods are not uncommon within religious institutes. The topic of management of resources in religious institutes is not only a concern of the institutes themselves but a matter that has been accorded great attention by the Congregation for Institutes of Consecrated Life and Societies of Apostolic Life, especially in more recent times.²

Secondly, as Section 3.1.3 of this study as well as the Institute-wide resource assessment

¹ See J. RENKEN, "Penal Law and Financial Malfeasance," in *Studia canonica*, 42 (2008), 5. The author observes that even though those entrusted with the stewardship of temporal goods of juridic persons in the Church are expected to respect their intended end, sometimes such persons abuse their function, causing financial harm to the Church, scandal to the faithful, hurt to donors, and damage to the good reputation of the Church. See *ibid.*, 6.

² See the recent circular letter on the administration of the assets in institutes of consecrated life and societies of apostolic life which directed, among other things, that programmes related to finances and management should be part of initial formation (CONGREGATION FOR INSTITUTES OF CONSECRATED LIFE AND SOCIETIES OF APOSTOLIC LIFE, Circular Letter on Guidelines for the Administration of Assets in Institutes of Consecrated Life and Societies of Apostolic Life, August 2, 2014, no. 3, Libreria editrice Vaticana, 2014, 21).

for capacity for life and ministry carried out in 2011 demonstrated, there is an imbalance in terms of resources and personnel across the Institute, that is, some provinces have fewer resources but adequate personnel and vice versa.³ Also, some parts of the Institute are undergoing significant structural changes which have implications on the patrimonial status of the entire Institute. Lastly, the ideologies of present human society which promote self-elevation, individualism, consumerism and materialism, all pose a challenge to the vow of poverty. These reasons call upon institutes, besides putting into place proper mechanisms of accountability and transparency with regard to management of resources, to offer adequate education to members on temporal goods and their management.

In the context of formation, there is need for a more in-depth education in the area of temporal goods and their connection with the vow of poverty, the principles prescribed by universal, proper and civil law on the acquisition, administration and alienation of goods by religious institutes. There is need for the younger members who are in formation to be educated on the financial status of the institute, together with any constraints which may exist. This will help towards their formation in responsible stewardship and constitute a means of putting the requirements of the vow of poverty in perspective.

Also, matters related to property and finances now require more attention to proper application of civil and canon law. Certain terms used in the domain of consecrated life, such as “superior,” “council,” “novice” and many others, demand a precise determination of equivalent secular terms in relation to financial matters, easily understandable by persons not familiar with

³ The report from the assessment indicated financial fragility in some provinces and pointed out, among other things, the need for responsible stewardship throughout the Institute, especially in view of financial security in the future. Such an initiative which involved the entire Institute served as a great eye opener to the members in terms of responsible use of the Institute’s resources and the need for sharing resources and personnel across the Institute. See The Final Report of the IBVM Capacity for Life and Ministry, Resource Assessment Prepared by L&P Financial Trustees Dublin, Ireland, 2012, in CPAT, Central Leadership Correspondence, Box 109.

ecclesiastical terminology.⁴ It is in the context of formation that the temporarily professed in a ministerial environment are to be helped to be aware of such challenges and ways of dealing with them.

The area of personal property also requires attention in the context of formation. Some of those who are admitted into the Institute are persons who may have owned property, managed their finances, lived independently and with considerable personal freedom. For such members, even though the question of personal property in relation to the demands of the vow of poverty would have been introduced during the novitiate, a follow up during the period of temporary vows is necessary for a deepened understanding on the subject. It is during the period of temporary vows that a sister is expected to make arrangements for the administration of her personal property and to write a will. It is therefore important that such arrangements be preceded by some instruction in view of the overall end of religious life and the necessary means to live it out.

In some parts of the world where the Institute exists, the writing of a will by women is something that is culturally still unacceptable as they are considered as having no right to own property. The cultural orientation is that wills are drawn only by men as they are the ones who enjoy full rights with regard to making dispositions about their property. The experience has been that sisters in such provinces have not been writing them even though it is a requirement of both proper and universal law. The period during temporary vows is therefore the opportune time when a gradual education coupled with an invitation to cultural transformation may be of great benefit in this matter. It can also be the time for clarity on the canonical and civil requirements with regard to personal property, Institute property, property shared between the Institute and

⁴ See CONNORS, *The Role of the Major Superior*, 1.

another body (for instance a diocese or the state) and the terms and conditions required for such arrangements.

4.1.2. Necessary Discretion in the Use of Means of Social Communication

Prudence in the use of means of communication is another area which is not explicitly presented as content of formation in the proper law of the Institute yet it is one which merits attention. For the members to lead the life of the Institute more fully with its specific demands for growth in spiritual life and deeper union with God, use of means of communication is to be specifically addressed in the context of formation. There is need for temporary members to be orientated towards self-discipline with regard to this matter.⁵

The present age of rapid technological advancement presents a reality whereby human interactions and true bonding and connections are more and more replaced by social media. The traditional structures and sources of information no longer have the monopoly of reporting of facts. The human person is becoming more and more alienated as technology continues to serve as a substitute for fulfillment and self-elevation.⁶ Religious who live in the same human society are not spared from the negative effects of the rapid technological advancement. In fact, religious in temporary vows are more affected due to the fact that they, as simply young(er) persons,

⁵ See *Formation Handbook*, 66. The Formation Handbook speaks of training in media and communication for effective ministry. It does not, however, include formation in the use of social media in connection with the challenges it may pose to the living of the vow of chastity, the contemplative aspect of religious life and to the spiritual growth which requires some degree of solitude.

⁶ On the danger of imprudent use of technology, Pope Francis observes that influence of the digital world can stop people from learning how to live wisely, think deeply and to love generously. Consequently, the great wisdom of the sages gets swallowed up amid the noise and due to information overload. See FRANCIS, Encyclical Letter on Care for Our Common Home *Laudato Si'*, May 4, 2015, no. 47, Libreria editrice Vaticana, 2015, 32-33, English translation *Encyclical on Climate Change and Inequality: On Care for Our Common Home*, London, Melville House, 2015, 29.

belong to a new generation of the present society. As Fernando Ayuso confirms, “the young people who come to consecrated life fully belong to the digital era.”⁷ Such religious are more accustomed to the use and, sometimes unconsciously, overuse or misuse of social media. With the current explosion of all kinds of gadgets for social media and the vast variety of applications they offer, it is not unlikely that religious, like any other persons, are bound to be manipulated or overly controlled by their use. This serves as a motivation for a greater focus in the formation on the prudent use of social media in the programme of those in temporary vows. Such an inclusion will be of great benefit to their formation especially on the deepening of spiritual life and understanding of the connection between a growing union with God and the living of the vows.

Universal law emphasizes the contemplative dimension of religious life. Canons 663-664 outline the obligation of nurturing spiritual life and canon 667 § 1 point out the necessity of creating in a religious house a solitude space. The spirit of recollection and solitude is reinforced by exhortation on prudence in the use of social media (c. 666). Mary Ward, the foundress of the Institute, despite the apostolic nature of her institute, also stressed the contemplative aspect of life of the members. An in-depth formation in the prudent use of social media is therefore necessary for the temporarily professed members. Such formation should include presenting the Church’s teaching on the use of social media and, particularly, the implications of their misuse on one’s vocation and the living of the vow of chastity (c. 666).⁸ The unlimited and unchecked use of social media may also pose a danger to community living.⁹

⁷ F.P. AYUSO, “The Digital Era: An Opportunity for Consecrated Life,” in *UISG Bulletin*, 144 (2010), 48.

⁸ See *PI*, no. 13 on the formation in the evangelical vows. It explains that the pedagogy should aim at “helping [...] to act with prudence in the use of the communications media and in personal relationships which may present an obstacle to a consistent practice of the counsel of chastity” (in *AAS*, 82 [1990], 478-480, in *Origins*, 19 [1989-1990], 681).

⁹ See CONGREGATION FOR INSTITUTES OF CONSECRATED LIFE AND SOCIETIES OF APOSTOLIC LIFE,

Rosemary Smith notes that caution on use of social media does not imply that the Church is against its use. On the contrary, the Church recognizes the positive benefits of mass media in the field of evangelization, especially on better and faster diffusion of information and as a way of sharing and enriching knowledge.¹⁰ Indeed, the conciliar decree *Inter mirifica* applauds the tremendous benefits of use of mass media in enriching and advancing the life of the modern man or woman and that of the society in which they live.¹¹ The recent document of the Pontifical Commission for Social Communication, namely, Church and Internet, emphasizes the indispensable necessity of technology in the work of advancing the mission of the Church, especially of evangelization.¹² The document reveals that the Holy See has been an active user of the cyberspace for several years and continues to expand and develop its presence in this area. Consequently, the Church recommends modern means of social communication, especially the internet, for all ecclesial-related groups.¹³

Despite the many advantages of social media, another document issued by the same Pontifical Commission for Social Communication, with a title, Ethics in Internet, admits of numerous challenges related to the Internet use.¹⁴ In the same token, John Paul II encouraged

Instruction on Fraternal Life in Community *Congregavit nos*, February 2, 1994, no. 34, in *Enchiridion Vaticanum*, vol. 14, 247-248, English translation in *CLD*, vol. 13, 272. For instance, it is not uncommon in religious houses to see members replacing quality time together with phone conversations, television or computer. Consequently, human exchange and conversations which help build community become superficial and growth in community life becomes impeded.

¹⁰ See R. SMITH, "The Obligations and Rights of the Institutes and their Members," in *CLSA Comm2*, 832.

¹¹ See SECOND VATICAN COUNCIL, Decree on the Means of Social Communication *Inter mirifica*, December 4, 1963, no. 19-20, in *AAS*, 56 (1964), 152, English translation in *FLANNERY I*, 301.

¹² PONTIFICAL COUNCIL FOR SOCIAL COMMUNICATIONS, The Church and Internet, February 22, 2002, no. 5, in *The Pope Speaks*, 47 (2002), 275.

¹³ See *ibid.*

¹⁴ See PONTIFICAL COUNCIL FOR SOCIAL COMMUNICATIONS, Ethics in Internet, February 22, 2002, nos. 10-14, in *The Pope Speaks*, 47 (2002), 286-288. The document cites some of the challenges associated with use of mass

consecrated persons to make use of mass media for their own growth and for the effectiveness of their apostolic work. However, he also cautioned them against the dangers of the distorted use of social media in view of what he referred to as “their [social media] extraordinary power of persuasion.”¹⁵ He therefore urged for a careful ethical assessment of their content, as well as the development of healthy habits in their consumption.¹⁶ Smith explains that the caution to be exercised by religious does not imply that they refrain from using social media but they be vigilant with regard to the possibility of misuse, abuse or overuse which can all be detrimental to personal and community life.¹⁷ The rationale of canon 666 is that religious are required to maintain a recollected spirit and avoid external interferences which may be detrimental to their spiritual growth. Misuse of social media may result in isolation since one may always be engrossed with the phone or the computer. Such a trend may lead to disruption of fraternal community life. There is also danger of intruding into other people’s privacy or violating confidentiality.

As F.P. Ayuso observes, most importantly it is not so much the knowing *how* to use the

media, namely: 1) “cultural divide - a form of discrimination dividing the rich from the poor, both within and among nations, on the basis of access, or lack of access, to the new information technology. In this sense it is an updated version of an older gap between the ‘information rich’ and ‘information poor’ [...]. The expression ‘digital divide’ underlines the fact that individuals, groups, and nations must have access to the new technology in order to share in the promised benefits of globalization and development and not fall further behind. It is imperative that the gap between the beneficiaries of the new means of information and expression and those who do not have access to them” (ibid., no. 10, 268), 2) “cultural domination is an especially serious problem [...] when [...] the internet, along with the other media of social communication, is transmitting the value-laden message of western secular culture to people and societies in many cases ill-prepared to evaluate and cope with it” (ibid., no. 11, 287), 3) the question of freedom of expression and free exchange of ideas at the risk of indiscriminate consumption of information especially by the youth without adequate capacity for evaluating their accuracy and integrity (see ibid., no. 12, 287), and 4) the possibility of negative effects of prolonged immersion in the virtual world of cyberspace on the psychological development of persons, an area which requires further research and evaluation. See ibid., no. 13, 288.

¹⁵ *VC*, no. 99, in *AAS*, 88 (1996), 475, in *L’Osservatore Romano*, April 3, 1996, supplement, 19.

¹⁶ See ibid.

¹⁷ See SMITH, “The Obligations and Rights of the Institutes and their Members,” 832.

modern means of communication as to *why* they are used and this is what “all consecrated persons, in particular the formators, must take into consideration in this digital age.”¹⁸ He further explains that the formation process is to help those being formed to discern, to appreciate and to create a culture of critical and responsible users of social media.¹⁹ It would also be important to include this aspect in the evaluation and review process. A temporarily professed sister who is unable to control her use of social means of communication and is a possible obstacle to community life by such practice might be considered as unfit for permanent commitment in the institute. The evaluation of prudence in the use of social media can be part of the probationary aspect of the formation process of the temporarily professed only when it is part of the content of formation and when the other members also include it as an aspect of their life. Formation in the appropriate use of mass media is a task not to be left only to formators. As Ayuso notes, it becomes all the more important for all religious to form themselves not only in the understanding of the digital culture, but also in the moral and ethical values underlying such a culture so as to be able to accompany the younger members in their formative process.²⁰

4.1.3. Structures of Authority and Governance in the Institute

The understanding and appreciation of the exercise of authority and governance in the Institute is one other area which merits attention during formation. One aspect of living the life of the Institute more fully and fulfilling its mission more effectively is by being available for

¹⁸ AYUSO, “The Digital Era,” 49.

¹⁹ See *ibid.*, 48.

²⁰ See *ibid.* See also PONTIFICAL COUNCIL FOR SOCIAL COMMUNICATIONS, *Church and Internet*, no. 11, 278 where it states: “Priests, deacons, religious, and lay pastoral workers should have media education to increase their understanding of the impact of social communications on individuals and society and help them acquire a manner of communicating that speaks to the sensibilities and interests of people in a media culture.”

works of the Institute, coordinated by and discerned with its agents of authority. This calls for a clear understanding of the role and meaning of authority in relation to consecrated obedience.

The sisters in temporary vows belong to the present generation whose culture tends to esteem self-determination and self-autonomy. This may often lead to a distorted understanding of the relationship between consecrated obedience and authority. It is therefore important that the formation process leads them to a deeper understanding and appreciation of obedience towards authority as a means of total and responsible positive giving of their own service to the Institute and not as some form of diminishment of self-autonomy. Such formation also is to be accompanied with education in the understanding of the spiritual role of authority as the means through which discernment for mission is facilitated and the whole body of the Institute is united.²¹ Likewise, the restructuring in some parts of the Institute as a result of diminishment in numbers also implies that the younger members may be more and more required to take on leadership roles. This calls for preparedness and formation, hence the need to include in the formation program the section on the leadership structures of the Institute.

The *Formation Handbook* speaks of availability of opportunities for exercising “responsibility and leadership” roles while the Constitutions do not indicate any position of leadership which may be occupied by those in temporary vows.²² On the one hand, sisters in temporary vows, in most cases, advance to perpetual profession having very little or no experience of participation in leadership within the authority structures of the Institute, while on other hand, experience has shown that soon after perpetual vows, some sisters are placed in positions of leadership either within the structures of the Institute or in various ecclesiastical or

²¹ See *IBVM Constitutions*, 6.5.

²² See *Formation Handbook*, 63.

other institutions, sometimes without any prior training or preparation. The problem is augmented further by the fact that the formation process for preparing leaders for the Institute is by its nature distinct from ministerial training which a sister may have received before perpetual vows. In other words, a sister may be well trained in school administration but that does not necessarily make her fit for being a superior in the community as this includes, besides the theological and spiritual formation, practical experience of such roles and these are not included in curricula of ministerial training institutions.

While some offices may by law require preparation and training, some only call for a certain disposition which can be perfected by experience. The status of consecrated persons in the Church translates every service they offer into part of fulfilling the mission of the Church. It is therefore of necessity that these persons are well trained and informed of the various tasks they are to perform. Future evaluation of the proper law of the Institute may need to consider creating some offices which universal law does not prohibit those in temporary vows from holding, for instance, the office of assistant treasurer at provincial and community levels. Such a move would be beneficial to sisters in formation in attaining the necessary skills and experience when and if they are required to hold offices and positions of leadership shortly after their perpetual profession.

Sisters in formation should be helped to know and understand the provisions of universal law which regulate structures of authority and power in religious institutes. In particular, they are to be helped in understanding the spiritual model of authority envisioned by the Church.²³ They

²³ Prior to Vatican II, the understanding of authority and governance within the Church was based on the model of hierarchical authority. This construct, referred to as the pyramid model, implied ascending levels of authority which come together under one head. All structures within the Church, including religious institutes applied the same model in their exercise of governance. Since Vatican II, and the subsequent promulgation of the 1983 Code, the understanding of authority within the Church shifted to that of a more participative and collaborative model. Based on the conciliar teachings, authority is considered in the context of the Church understood as the

are also to be taught about the mechanisms through which governance in various structures of the Church's organization is exercised. This would include the mode of governance and the evangelical values which characterize authority within the religious institutes and during the celebration of their general chapters.²⁴

Besides the provisions of universal law, sisters in formation are also to be orientated into the development of the understanding of governance in the Institute which derives its foundation from the Ignatian tradition and Mary Ward's vision for her institute, producing in effect distinctive models of exercising authority in the respective branches of the Institute.²⁵ The sisters in temporary vows are to be helped to understand the link between authority and mission and the Christo-centric meaning of authority. In this perspective, the exercise of spiritual authority entrusted to those in leadership is based on gospel values and guided by the principles of

People of God and those who govern considered as participating in the universal authority of Christ. Leadership is understood as a gift received from the Spirit for service to the People of God in the mission of Christ. See *LG*, no. 4, in *AAS*, 57 (1965), 6-7, in *FLANNERY I*, 351-352.

²⁴ The exercise of governance within Church structures demands that persons (or groups of persons) who hold authority acquire and exercise it in accordance with the provisions of law (cc. 129-144).

²⁵ Traditionally, the structure of authority in the Institute was modeled on the Jesuits' hierarchical model of leadership which was adapted by the Foundress, Mary Ward. With the historical growth and expansion together with cultural and political factors, there have been adaptations and modifications of this model to suit specific cultural and social circumstances. This was the case of the former North American Branch which adopted a more democratic style of authority by adapting a feminized model of the Ignatian structure of authority. See E.M. COTTER, *The General Chapter in a Religious Institute with Particular Reference to IBVM, Loreto Branch*, Bern, Peter Lang, 2008, 15. The former Irish Branch and the Roman Branch however, retained the Ignatian model in their exercise of authority. However, for the former Irish Branch, as Elizabeth Cotter notes, there were always tensions between the hierarchical model of authority and the contemporary trends. The question of relevance of a male-perspective of government as applied to women living in the contemporary world led to a growing desire for "a feminized model of the Ignatian style of authority" (ibid., 259). The general chapters of the Institute after Vatican II focused on exploring more collaborative structures of governance. With the reunion of the North American and Irish Branches, the new institute fused together the two models of government which had been operational in the former branches. See the Forward Note of the revised Constitutions where the Institute's leader states: "We are privileged to live at a time in history when it is possible to 'take the same of the society' in the fullest sense. Volume I [of the Constitutions] expresses our Ignatian spirituality and way of proceeding and Volume II reflects our 21st century way of living the Ignatian model of religious life" (IBVM *Constitutions*, 7).

collaborative participation.²⁶ It can be expected that incorporating the training in the governance structures and meaning of authority as specific content of the programme of those in temporary vows would be for a great benefit to the Institute. First, the Institute would be able to identify easily those with leadership skills and, in the context of formation, accord them appropriate training. Secondly, such formation would lead to a deeper understanding and appreciation of authority and governance in the context of consecrated obedience among younger members and hopefully, their greater collaboration and participation in the mission of the Institute.

4.1.4. Cultural studies

Some content on cultural studies in the formation programme of those in temporary vows would greatly benefit their life as religious. Charisms are lived by members situated in their cultural context and each cultural group will have its own expression of them. Throughout the history of the Institute, there has been the movement towards unity amidst cultural diversity. Such unity was actualized with the reunion in 2003 of two branches of the Institute, with an ongoing focus of creating a deeper sense of oneness and a stronger recognition of the Institute as one body with one mission. The reality of cultural diversity in the Institute calls for greater understanding and appreciation of the different cultures from which come its members.

Also, the present realities of the Institute, whereby some parts have sufficient personnel but require other resources, or vice versa, have led to a pooling of resources, including sharing personnel, and creating oneness which goes across various boundaries. It is most likely that in

²⁶ In the renewal process mandated by *Perfectae caritatis*, the Church encouraged religious institutes to re-design their authority structures in the way that they embody the principles of communion, participation, service, mutuality, collaboration, subsidiarity, responsibility, mutuality, dialogue and collegiality. See *PC*, no. 14, in *AAS*, 58 (1966), 708-709, in *FLANNERY I*, 619-620.

the future, more and more members, especially the younger generation, will be living and serving in provinces which are not of their origin. It is therefore important that those in temporary vows are offered some specific orientation, however general, on the European, American, Asian and African cultural milieus which are the major sources of the Institute's membership.²⁷ Some form of such basic training should help towards a better understanding and appreciation of the cultural richness and diversity, necessary for a harmonious life of religious communities.²⁸

The *Formation Handbook* identifies formation in a multicultural context as one of the challenges in relation to community living and witness to gospel values.²⁹ It also outlines understanding of principles of inculturation and cross-cultural experience as part of formation of the temporarily professed members.³⁰ However, besides cross-cultural experience, there are no provisions in the proper law of the Institute providing some guidelines on the content and depth of cultural training for members in formation. Given the realities in the Institute, an effective

²⁷ The Institute of the Blessed Virgin Mary has a multicultural and international membership drawn from five continents comprising of diverse cultures and subcultures. See IBVM *Constitutions*, 1.12.

²⁸ Gerald Arbuckle in his evaluation of multicultural/international religious communities gives an overview of cultural variations of different parts of the world. He notes, for instance, that people from East Asia presume that a visitor's needs are to be anticipated by the host. They therefore get puzzled when the host keeps asking them what they would like. Japanese culture does not encourage self-disclosure even among friends while for Westerners self-revelation is accomplished with ease, even at the earliest stages of acquaintance. Likewise, Westerners tend to be concerned with personal space and time, unlike Asian and African cultural outlook which emphasize communal identity and cohesion. Out of ignorance, a person with a background of Asian or African cultural orientation may feel obliged to be constantly present to a Westerner, imagining he or she is lonely only to be rejected by the Westerner who may likely interpret the gesture as intrusion on his or her private space. Westerners culturally tend to observe time and keep schedules and to them, activity is fitted into time. African cultures tends to be more of the opposite, where time is fitted into activity, that is, if a certain activity requires more time, the duration for it will be extended, even at the expense of the next activity. These variations of culturally grounded behavioural traits, if not properly understood and appreciated, are bound to cause serious conflicts and tensions in a multi-cultural religious community. See G.A. ARBUCKLE, *From Chaos to Mission: Refounding Religious Life Formation*, Collegeville, MN, Liturgical Press, 1996, 166.

²⁹ See *Formation Handbook*, 8.

³⁰ See *ibid.*, 66.

cultural formation may require some specific input from persons belonging to a specific culture or involving an expert on the subject.

Patricia Murray, in her reflection on personal inter-cultural experiences notes that occasions of misunderstandings which arise in inter-cultural communities are mostly a result of lack of basic skills necessary for understanding and interpreting the communication or behaviour of a person from another culture.³¹ She points out that to understand and respect another person's culture is to affirm another person's identity and acknowledge his or her dignity. She explains that familiarity with a certain culture does not amount to understanding it.³² Knowledge of culture involves understanding the norms and communication rules so that the behaviour of people can be interpreted accurately.³³ She eventually proposes that studies of cultures should be part and parcel of initial and ongoing formation programs. She argues that knowledge and appreciation of other members' cultures will help build mutual respect, trust and understanding and, consequently, shape intercultural communication and communion of one body.³⁴

4.1.5. Mariology

Canon 663 § 4 exhorts all religious, as a means for their progress in spiritual life, to cultivate special devotion to Mary Mother of God as their model of consecration. The canon is reinforced by numerous papal messages³⁵ and documents of the Holy See³⁶ which reiterate the

³¹ See P. MURRAY, "Intercultural Leadership," in *UISG Bulletin*, 153 (2013), 42.

³² See *ibid.*, 44.

³³ See *ibid.*, 42.

³⁴ See *ibid.*, 44.

³⁵ Pope John Paul II in his discourse on the Marian dimension of consecrated life exhorts all consecrated

significance of Mary as example and mother of all consecrated persons and stress the pre-eminence of Mary in the life of consecrated persons as a model of consecration, evangelical witness, and faithful discipleship and emphasize her special link to the mystery of redemption and salvation.

Mary Ward, the Foundress of the Institute of the Blessed Virgin Mary had a special

persons to meditate on and imitate the values embodied in the life of Mary. He desired that she may encourage the consecrated persons in their path to holiness (see JOHN PAUL II, Letter to All Consecrated Persons Belonging to Religious Communities on the Occasion of the Marian Year, May 22, 1988, in *Consecrated Life*, vol. 14, no. 2 [1989], 199-209); teach them to follow her obedience and love which led her to the foot of the cross (see ID., Message to Women Religious, May 4, 1987, in *Consecrated Life*, vol. 14, no. 2 [1989], 144); to emulate her as model of consecration, and, at the same time, of apostolic service (see ID., Message to UISG, May 14, 1987, in *Consecrated Life*, vol. 14, no. 2 [1989], 153); to find joy and strength in greater devotion to Mary, the Model and Protectress of all consecrated persons (see ID., Message to All Religious in San Francisco, USA, September 11, 1987, in *UISG Bulletin*, 87 [1991], 26). Pope Francis entrusted the Year of Consecrated Life (November 30, 2014 to 2 February 2016) to the Virgin of listening and contemplation, the first disciple of her beloved Son. He invited all consecrated persons to emulate her as their unsurpassed model of love of God and service to their neighbor. In his letter to consecrated persons, the Pope refers to Mary as the model of joy and of the virtues of hope, charity and faith. The Holy Father exhorts them to take Mary's example as their motivation. Like her who was sparked by great love for God, let them go out to the most fragile in great faith and zeal of sharing the special gift of God's love with others. See FRANCIS, Apostolic Letter to Consecrated Persons on the Occasion of the Year of Consecrated Life *Scrivo a voi*, November 21, 2014, no. III (5), in *AAS*, 106 (2014), 947, English translation in *L'Osservatore Romano*, English ed., December 5, 2014, 20.

³⁶ The instruction of the Congregation for Institutes of Consecrated Life and Societies of Apostolic Life on inter-institute collaboration for formation directly links the study of mariology to post-novitiate formation when it states: "Thus, this phase of formation continues the study of Sacred Scripture and other theological subjects, such as christology, ecclesiology, mariology, moral theology, and the theology of history [...]" (CONGREGATION FOR INSTITUTES OF CONSECRATED LIFE AND SOCIETIES OF APOSTOLIC LIFE, Instruction on Inter-Institute Collaboration for Formation *Attenta alla condizioni*, no. 17[b], in *Enchiridion Vaticanum*, vol. 17, 1356, in *CLD*, vol. 14, 607). Another document of the same dicastery, *Starting Afresh from Christ*, no. 46 refers to Mary as a splendid witness of fidelity, a model of living out the evangelical counsels and one whom all consecrated persons are invited to look up to as their mother and teacher (in *Origins*, 32 [2002-2003], 147). John Paul II, in *Vita consecrata*, presents the Virgin Mary as a model of consecration in her virginal love (nos. 34 and 97, in *AAS*, 88 [1996], 407-408 and 472-473, in *L'Osservatore Romano*, April 3, 1996, supplement, 6 and 19, respectively) and discipleship (no. 28 in *AAS*, 88 [1996], 401-402, in *L'Osservatore Romano*, April 3, 1996, supplement, 5). He entrusts consecrated persons to her care in their mission of bringing Christ to the world and in their eschatological witness of vowed consecration. Mary is a model of consecrated life: "ready in obedience, courageous in poverty and receptive in fruitful virginity" (*VC*, no. 112, in *AAS*, 88 [1996], 485-486, in *L'Osservatore Romano*, April 3, 1996, supplement, 21). The document of the Congregation of Institutes of Consecrated Life and Societies of Apostolic Life, Essential Elements in the Church's Teachings on Religious Life as Applied to Institutes Dedicated to Works of Apostolates refers to Mary as a model of consecration par excellence in her fidelity to the values of consecration and in her *fiat* and *magnificat* which manifest the totality of surrender in which consecrated life finds its fullest meaning (see *CLD*, vol. 10, 76) while *Potissimum institutioni*, no. 20 presents Mary as an agent of formation. Religious persons encounter Mary not only as a model of perfect consecration but also as mother. In her motherhood, she carries Christ in her arms and as a disciple, she fulfills in the perfect way his call by following him as her teacher of chastity, poverty and obedience. See *PI*, no. 20, in *AAS*, 82 (1990), 486-487, in *Origins*, 19 (1989-1990), 684.

spiritual proximity with Mary. During the period of her search for the ecclesiastical approval of the Institute, she often sought the intercession of Our Lady of Loreto and made several pilgrimages to the Shrine.³⁷ She also placed the Institute under the patronage of Mary, the Mother of God and urged all her companions to have a special devotion to her.³⁸ Ultimately, Mother Teresa Ball, the founder of the former Irish Branch of the Institute, assigned the name Loreto to all the houses and institutions of the Institute.³⁹

Despite the call by the Church for Marian orientation for all consecrated persons and the rich Marian tradition of the Institute, the study of mariology is not expressly included as part of the content of the programme of formation of members. Arguably, it can be claimed that the theological training undertaken during the period of temporary vows includes some study of mariology. However, the special treatment and the specific references to Mary in the Church documents on consecrated life, together with the rich Marian heritage of the Institute which forms part of the sound traditions (c. 578),⁴⁰ justify the specific inclusion of the study of mariology in the content of formation program during temporary vows. The understanding of religious consecration, the living of the evangelical witness and the Marian heritage of the Institute can be greatly enriched by an in-depth study of the values Mary lived as Mother of God and Christ's disciple.

³⁷ See FORRISTAL, *The First Loreto Sister*, 67. The author refers to Mary Ward's visits to the Shrine of Our Lady of Loreto. One such visit occurred in 1621, on her way to Rome to seek papal approval of her Institute and another took place in 1629, shortly before the suppression of the Institute. See also CHAMBERS, *The Life of Mary Ward*, vol. 1, 357.

³⁸ This Marian heritage is also reflected in the Institute's name, the Institute of the Blessed Virgin Mary. See CAMERON, *Dangerous Innovator*, 171.

³⁹ See FORRISTAL, *The First Loreto Sister*, 68.

⁴⁰ See IBVM, *Directory*, 3, on Marian orientations which are part of the Institute's traditions: the Rosary, *Salve Regina*, Litany of Loreto, *Memorare*, *Sub Tuum Praesidium* and the feasts of Mary Mother of God, January 1 and of the Visitation, May 19.

4.1.6. Familiarity with the Documents of the Holy See and Contemporary Theological and Spiritual Publications on Consecrated Life

Pursuant to canon 592 § 2, moderators of each institute have the duty of promoting the knowledge of Holy See documents which concern the members of their institutes and to ensure that directives of these documents are observed. However, one has to say that familiarity with the Vatican documents and publications on contemporary theological trends on consecrated life is rather not a strong feature in the Institute of the Blessed Virgin. Familiarization with the contemporary theological development on the understanding of consecrated life enriches formation with up-to-date information on the directions and trends of the present day. Knowledge of official Church documents is of great benefit to consecrated persons as these documents are the main sources of the Church's responses to emerging issues affecting consecrated life, especially on matters which are not sufficiently addressed in universal and proper law. Indeed, these Church documents are indispensable and valuable resources contributing to the development of the up-to-date perspective in religious formation, as some of them refer specifically to matters concerning formation. *Potissimum institutioni*, no. 3 affirms the above when it states:

It will be useful to refer to these different documents, since the formation of religious must be given in complete harmony with the pastoral directions of the universal Church and of particular Churches, and in order to assist in the integration of interiority and activity in the lives of men and women religious dedicated to the apostolate.⁴¹

The *Formation Handbook* speaks of familiarization with the sources of Church history, spirituality and tradition in the context of contemporary theological developments. Such information about the Church and on consecrated life has its sources in the Holy See documents.

⁴¹ See *PI*, no. 3, in *AAS*, 82 (1990), 473-474, in *Origins*, 19 (1989-1990), 679.

Experience indicates that the programme of formation of members during temporary vows appears to overlook the significance of orientating the temporarily professed towards assimilating the content of those documents.

Knowledge of the Holy See documents and of literature on current theological thought should not be limited only to the members in formation. For an apostolic institute, it is also very important that all members be familiar with papal and magisterial teachings concerning the entire life of the Church. For example, the latest encyclical letter by Pope Francis on care for our common home *Laudato Si'* connects very well with the Institute's mission of justice.⁴² The encyclical serves as a good resource in the context of formation in creating ecological awareness and the apostolic obligation arising from the mission of the Institute.⁴³ Given the nature and demands of the novitiate, adequate familiarization with the documents of the Holy See may not be possible. The period during temporary profession is thus the appropriate time to help cultivate the culture of interest in reading and appreciating these documents as one way of creating ecclesial awareness.⁴⁴

4.2. Aspects to Be Considered in the Structure of the Formation Programme of Religious in Temporary Vows

The study has revealed that certain aspects in the structure of the formation programme of

⁴² See FRANCIS, Encyclical Letter on Care for Our Common Home *Laudato Si'*, May 4, 2015, Libreria editrice Vaticana, 2016, English translation *Encyclical on Climate Change and Inequality: On Care for Our Common Home*, London, Melville House, 2015.

⁴³ See IBVM *Constitutions*, nos. 2.7-2.9.

⁴⁴ See *Formation Handbook*, 63. See also *PI*, no. 21, in *AAS*, 82 (1990), 487-488, in *Origins*, 19 (1989-1990), 685.

the temporarily professed betray a lack of adequate application of norms. In order for the programme of formation to effectively fulfill its goals, more attention needs to be accorded to the notion of formative community, the training and preparation of director of sisters in temporary vows, harmonization of the different aspects of formation during the period of temporary vows, apostolic duties undertaken by members which impede formation, and availability of a well-stocked library.

4.2.1. Formative Community

One area that needs to be clearly specified in the formation programme of the temporarily professed sisters is what can be termed as a formative community. Universal law presents fraternal life in community as an intrinsic and fundamental element of religious life (c. 6072 § 2) and as the place where the spiritual and material wellbeing of religious are fulfilled (c. 608). The Constitutions identify community, which exists for mission, as an integral and essential aspect of life expressed in the relationship among members in the manner of the Trinitarian communion. The Constitutions also describe community as one marked with friendship, a deep sense of belonging, mutual support and sustained by honest conversations, a spirit of trust, prayer and discernment.⁴⁵ For the temporarily professed, community life as one of the formative dimensions, provides the *locus* for deepening the integration into the life through the experience of “living a truly religious life in accord with the ends of the institute.”⁴⁶ Community life therefore provides for the member in formation the means of learning how to balance personal needs and interdependent living.

⁴⁵ See IBVM *Constitutions*, 3.14-3.18.

⁴⁶ *PI*, no. 28, in *AAS*, 82 (1990), 491-492, in *Origins*, 19 (1989-1990), 685.

The temporarily professed not only require a community as a place where they reside with others as required by law, but also a stable environment which is conducive for them to learn and to grow towards their maturity. Community life experienced in a religious house where members reside is to have a distinctly formative character. It is the prerogative of the competent internal authority of the Institute to ensure that sisters in formation are provided with a formative community.⁴⁷

It is in the context of a formative community that those in formation are best guided into the understanding of both the existential and spiritual meaning of living in community. Moreover, the reality of many particularities of ways of living in community presently practiced in the Institute serves as a motivation for considering a formative community as a proper *locus* of the formation of members.

The 1983 Code of Canon Law does not explicitly connect formation of the temporarily professed religious to a religious house, nor does it speak of a formative community. However,

⁴⁷ *Potissimum institutioni* distinguishes in a formative community the “internal community,” that is, the religious house in which members in formation live, and the “external community” which is the cultural and social community where the formation house is inserted (nos. 27- 28, in *AAS*, 82 [1990], 491-492, in *Origins*, 19 [1989-1990], 685). The document describes a religious community not as a place where members base their bonds in an affinity in thought, character, or options, but one that traces its foundation and unity in the Lord, based on a common consecration and oriented to a common mission within the Church. This unity is reinforced by the particular exercise of authority by the institute leaders (no. 26, in *AAS*, 82 [1990], 490, in *Origins*, 19 [1989-1990], 685). The document also distinguishes between a “community” and a “formative community.” It clarifies that a formative community is one where a religious in formation is able to find a spiritual atmosphere, an austerity of life, and an apostolic enthusiasm among members. It further explains that, “community is formative to the extent that it permits each one of its members to grow in fidelity to the Lord according to the charism of his or her institute” (ibid., no. 27, in *AAS*, 82 [1990], 490-491, in *Origins*, 19 [1989-1990], 685). Accordingly, a formative community is to have the following characteristics: 1) its interpersonal relationships are “marked by simplicity and confidence, being based primarily upon faith and charity,” 2) it is “formed each day under the action of the Holy Spirit, allowing itself to be judged and converted by the Word of God, purified by penance, constructed by the Eucharist, and vivified by the celebration of the liturgical year,” 3) its bonds are further strengthened by generous mutual assistance and by a continuous exchange of material and spiritual goods, marked with friendship and dialogue in a spirit of poverty, 4) a community in which “the spirit of its founder and the rule of the institute are lived profoundly” and 5) each and every one strives to grow and work towards the good of all (ibid.). As for the external formative community, the document stresses the fact that the environment where the formation community is inserted must not jeopardize the purpose and process of formation and the religious identity of those in formation. See ibid., no. 28, in *AAS*, 82 (1990), 491-492, in *Origins*, 19 (1989-1990), 685.

the Code stipulates that religious, not excluding those in formation, reside in a religious house (c. 608) assigned to him or her (c. 665), living the fraternal life rooted in charity (c. 602). The subsequent Holy See documents on consecrated life, especially those on formation, are more explicit on what is considered a formative community and its significance in the formation of members. *Potissimum institutioni*, for instance, observes that “community life enjoys a privileged role in formation at every stage.”⁴⁸ The document further explains that it is therefore important for those in formation to have a formative community environment and to be helped to understand and appreciate the meaning and role of community in view of their formation.⁴⁹

The *Formation Handbook* of the Institute of the Blessed Virgin Mary identifies the local community as the *locus* of the formation of the temporarily professed members and actually accords more responsibility for this formation to the local community leader than to all other persons involved with the member.⁵⁰ There is, however, more emphasis on the spiritual dimension of community over its material dimension.⁵¹ There is, therefore, a need for a balanced understanding of both dimensions.

The proper law of the IBVM recognizes a variety of ways of living arrangements for members: large or small communities, some sisters living alone or living together with members of other institutes or female lay persons.⁵² However, the manner in which these models suit the formative needs of the member and whether all the models qualify as formative community is

⁴⁸ Ibid., no. 26, in *AAS*, 82 (1990), 490, in *Origins*, 19 (1989-1990), 685.

⁴⁹ See *ibid.*

⁵⁰ See *Formation Handbook*, 64 and 68.

⁵¹ See *ibid.*, 64.

⁵² See *ibid.*

not clarified. The question, therefore, arises as to what could be defined as the formative community and what model of community living currently being practiced in the Institute would be best suitable for those in temporary vows. This needs to be clarified in the proper law.

While the size (large or small) of the community may not be the decisive criterion for determining a formative community, the composition of membership and model of living in a particular house should be factors for consideration when responding to the formation needs of the members. For instance, a community composed predominantly of either members of other institutes or lay women may not be ideal for a member in formation as it does not allow the unique character of the Institute to be experienced in a practical manner. Likewise, living with only one other member would not be conducive for the temporarily professed as this life setting lacks the structure and most elements of a religious house necessary for the formation process.

When ascribing temporarily professed members to a house, there is need for a conscious consideration of their formation needs vis-à-vis the structure and model of the community living in that particular house. It is therefore important that before their perpetual commitment, those in temporary vows have had at least experienced community living which offers a formative environment in terms of its structure and model.

4.2.2. Training and Preparation of Director of Sisters in Temporary Vows

One other aspect of the structure of formation of the temporarily professed sisters which requires more attention is the preparation of the director. The *Formation Handbook* highlights the crucial role of the director of the temporarily professed members. Appointed for her human,

practical, religious and spiritual qualities, the director has the task of implementing and coordinating the programme, and of directing and accompanying the member in her discernment and formation. She is also the one who links the province leader, community leader and the sister in formation.⁵³ It is her mission to help those in her charge to reach the necessary integration, freedom and unity of life. As Gambari notes, the outcome and the fruit of formation depend largely on the director.⁵⁴ Her work is to prepare the religious for the life and mission of the Institute both for the present and for the future. She is to guide and, at the same time, help them develop personal freedom and responsibility in deepening their own understanding of their vocation. Given the grave responsibility of the director, she requires appropriate training, qualifications and support for her work.

The Church obliges superiors of institutes to ensure that formators be carefully chosen and well trained in “theological and pedagogical formation, spiritual formation and competence in the human sciences, and specific training for the tasks to be carried out on the journey of formation.”⁵⁵ Even though the director may be endowed with natural moral and religious qualities, as Gambari observes, such qualities in themselves do not suffice for effectiveness in the ministry of formation. It is necessary that they be integrated, developed and supplemented by theoretical and practical knowledge of doctrine, spirituality and theology of religious life and of the Church in their contemporary understanding.⁵⁶

While the Institute acknowledges the significant role of the director of those in temporary

⁵³ See *Formation Handbook*, 69-70.

⁵⁴ GAMBARI, *Religious Adult in Christ*, 208.

⁵⁵ *Attenta alla condizioni*, no. 24, in *Enchiridion Vaticanum*, vol. 17, 1367, in *CLD*, vol. 14, 618.

⁵⁶ GAMBARI, *Religious Adult in Christ*, 205.

vows, experience shows that training and preparation for this office has not been accorded as much attention as is required. Evidence of this challenge was the effort in 2012 by the central leadership towards in-training of directors of formation.⁵⁷

For an effective and beneficial programme of formation during the period of temporary vows, the Institute, through its internal authority, needs to accord more resources and time in the preparation of future directors of formation, especially for directors of the temporarily professed sisters. This training should also include updating courses so that the directors are apt with what Gambari refers to as “up to-date-ness,”⁵⁸ that is, familiarity with the world of those being formed, changes and new realities in the religious life, the Church and the world.

4.2.3. Harmonization of Different Aspects of Formation during the Period of Temporary Vows

Harmonization of the components of the post-novitiate formation is another area which calls for attention in the formation structure of the Institute. Universal law and the Holy See documents on formation emphasize the integration of all dimensions of post-novitiate formation in order that it may achieve its ends (c. 660).⁵⁹ This integration of all the components of post-novitiate formation goes beyond harmonizing the content of the programme. In addition, the integration includes a wide range of coordination, of harmonizing all stages of formation and ensuring that training received from other centres of formation supplements rather than replace

⁵⁷ See footnote 80 in Chapter Three, concerning Barbra Murphy’s letter to province leaders and directors of formation on the occasion of the meeting of directors of formation in Nairobi, August 2, 2012, in CPAT, Central Leadership Correspondence, Box, 109. See also The Institute Report 2006-2014 Booklet, 13, in CPAT, Box 91.

⁵⁸ See GAMBARI, *Religious Adult in Christ*, 204.

⁵⁹ See *PI*, no. 60, in *AAS*, 82 (1990), 508, in *Origins*, 19 (1989-1990), 691.

the formation programme of the Institute.⁶⁰ This integration also implies that ministerial training fits into the purpose and character of the Institute and fulfils its apostolic needs.⁶¹ It also calls on the competent authority to ensure that the temporarily professed member has an environment conducive for her formation.⁶² Harmonization of the formation process calls for a certain equilibrium, something that *Potissimum institutioni* refers to as “a right balance between the formation of the group and that of each person, between the respect for the time envisioned for each phase of formation and its adaptation to the rhythm of each individual.”⁶³

The proper law of the Institute recognizes that the outcome of the formation process of the temporarily professed member is to lead to her human, spiritual and apostolic integration.⁶⁴ However, experience indicates that such integration continues to be a challenge in terms of choice and timing of ministerial training, availability of formative community and coordination among those involved in the formation of a member. While the Institute’s proper law speaks of discernment and consultation prior to ministerial training by those involved with a member in formation, nevertheless, timing of such training or its formative and probationary implications are not specified.⁶⁵

It is expected that after undergoing the formation process, the sister achieves an appropriate level of human, religious, apostolic and spiritual integration.⁶⁶ This calls for

⁶⁰See *ibid.*, no. 65, in *AAS*, 82 (1990), 510, in *Origins*, 19 (1989-1990), 691.

⁶¹ See *MR*, no. 26, in *AAS*, 70 (1978), 490, in *FLANNERY2*, 227-228.

⁶²See *PI*, no. 61, in *AAS*, 82 (1990), 508-509, in *Origins*, 19 (1989-1990), 691.

⁶³ *Ibid.*, no. 29, in *AAS*, 82 (1990), 492-493, in *Origins*, 19 (1989-1990), 686.

⁶⁴ See *Formation Handbook*, 80.

⁶⁵ See *ibid.*, 64.

⁶⁶ See *ibid.*, 80-81.

sensitivity to the probationary nature of formation during the period of temporary vows and implies harmonization of the different stages of formation as well as an opportune timing of studies for ministerial preparation so that what is studied becomes part of the evaluation process and contributes to a deepening of understanding of the mission of the Institute proper to the stage of formation.

The integration also calls for proper coordination among those involved in the formation of the temporarily professed member. This demands that the boundaries and limits of their roles and responsibilities are clearly specified, especially in the evaluation process. This objective calls again for sensitivity to the probationary nature of formation during temporary vows and to the needs of those in formation when assigning them to religious houses and to apostolates. It also requires an appropriate choice of courses which fulfill the mission of the institute and the needs of the Church and, if necessity requires, choice of appropriate training in institutions outside the Institute, harmonized however with the Institute's proper formation programme.

4.2.4. Duties which Impede Formation

This is one area which the formation process of the Institute needs to accord more attention. Universal law instructs that offices which impede formation during temporary vows are prohibited (c. 660 § 2). While the *Formation Handbook* reiterates that during studies, members are to be freed from all ministerial occupations, nevertheless the experience in the Institute shows occasions of temporarily professed undertaking full time studies as well as full range apostolic ministries. As Jordan Hite explains, such an arrangement may have a long range

negative impact on the life of the member in the institute.⁶⁷ It may impede integration as a result of imbalanced attention between studies and other aspects of life. *Statuta generalia*, no. 40 § 6 extends the norm which prohibits tasks and offices which may impede formation to the formation personnel.⁶⁸ *Potissimum institutioni* also points out that in order for them to be effective in their task, formators require a generous and total dedication in their commitment.⁶⁹ It is, therefore, important that those charged with formation are not overburdened with other ministerial occupations which take time and energy away from their formation work.

The practice in the Institute is that directors of the temporarily professed also hold ministerial tasks besides the work in formation. While this would be justifiable in those parts of the Institute where there are small numbers of sisters in temporary vows, consideration of the character and demands of ministerial tasks assigned to those who direct temporarily professed sisters would be in order in the provinces with a large number in formation. This calls for sensitivity on the part of the authority who makes assignments and for consideration of some future revision of the proper law to include precise norms in this regard.

4.2.5. Availability of a Well-stocked Library

One other aspect which would be of benefit to the formation of the temporarily professed members is a well-stocked library, specifically devoted to publications on formation. While literary material and information are an indispensable resource for formation, experience

⁶⁷ See HITE, "Admission of Candidates and Formation of Members," 164.

⁶⁸ See *Statuta generalia*, in *The Apostolic Constitution Sedes Sapientiae and the General Statutes Annexed to It*, 55.

⁶⁹ See no. 23, in *AAS*, 82 (1990), 488, in *Origins*, 19 (1989-1990), 684.

indicates that in some provinces of the Institute where formation work is still alive, libraries for those in formation do not exist. Also, while the *Formation Handbook* specifies familiarization with the Church's teachings and the Institute's spirituality, history and traditions in the context of current theological developments, it does not include provisions for a library which would constitute one of the resources for formation. There is, therefore, a need for the Institute to ensure at all levels of leadership that members in formation have access to pertinent educational material, especially concerning magisterial and doctrinal aspects of consecrated life and to the current theological literature on the same.⁷⁰

There is also need for future consideration for including in the *Formation Handbook* specific norms on availability of a library for formation. Such a library is to be stocked with up-to-date Holy See documents, especially those on consecrated life. It is also to include subscriptions to theological and spiritual journals and other similar material, available both in print and the electronic media. This will enable the temporarily professed sisters to have easy access to information that could help them in their spiritual, doctrinal and practical formation and to develop a spirit of reading and of appreciating the Holy See documents and theological and spiritual literature on consecrated life.

4.3. Recommendations

The following section attempts to provide recommendations on how the formation process of sisters in temporary vows may be enriched not only in the Institute of the Blessed Virgin Mary but in all religious institutes. The section therefore proposes the inclusion of some

⁷⁰ Canon 661 obliges superiors to make available time and resources to members in order to continue their spiritual, doctrinal and practical formation. This, as Andrés explains, is to include a well-stocked library, accessible to members (see footnote no. 65 in Chapter Two).

aspects of life of the Institute in the programme of formation of the temporarily professed. It also postulates some directions regarding future revisions of canons related to the question of formation during the period of temporary vows and envisages perspectives for further legislation on the same.

4.3.1. Identity of the Institute

The identity of an institute is what gives it the purpose of existence and a distinct character. All members of the institute and in a particular way, those in authority, have the obligation of observing with fidelity that which is proper and characteristic of the institute, that is, all the elements which constitute its reason for existence as approved by the ecclesiastical authority.⁷¹

Having its roots in *Perfectae caritatis*, no. 2 (b),⁷² canon 578 outlines seven basic distinguishing elements of an institute of consecrated life which constitute its unique identity. These elements also constitute the spiritual patrimony of an institute which every member is to be helped to understand and assimilate during their formation. The canon lists these elements as: 1) intention of the founder[s], 2) the dispositions of the founder[s], 3) nature of the institute, 4) its purpose, 5) spirit, 6) character, and 7) sound traditions.

The intention refers to the original vision of the founder[s]. The dispositions of the founder[s] relates to the particular views of the founder[s] concerning the life and proper works of the institute. For instance, the vision of Mary Ward was that all apostolic endeavours of the

⁷¹ See T. RINCÓN-PÉREZ, “Commentary on Faithfulness to the Patrimony of Each Institute (c. 578),” in *Exegetical Comm*, vol. 2/2, 1482.

⁷² See *AAS*, 58 (1966), 703, in *FLANNERY I*, 612.

Institute were to be imbued with the spirit of justice, freedom and sincerity.⁷³ Dispositions of the founder[s] have a bearing on the identity of the institute as it connects its past to the present.

The notion of nature refers to the institute's distinctive canonical identity: whether the institute is secular or religious, contemplative or apostolic, lay or clerical as approved by the Church authority. The purpose of the institute refers to the motive for which it was founded. In other words, the purpose is the vision or the inspirational spiritual gift which the founder[s] received. The expression of the purpose may change as needs and circumstances change but the original thrust has to be consistently safeguarded throughout the history of the institute. Formation is to help the temporarily professed understand what the specific purpose of the founder was and how this purpose derives from the general purpose of the Church. The aim of this stress on the correct understanding of the purpose is to protect the specific purpose of an institute from being jeopardized, especially through apostolic works which are not proper to the institute. For the Institute of the Blessed Virgin Mary, the original thrust is thus defense and propagation of faith by means of education and through all works of justice.⁷⁴

The spirit refers to the spirituality of the institute. This is the specific modality through which the institute articulates the mystery of Christ to the world. Religious families are endowed with a variety of spiritualities, to mention some: Marian, based on devotion to Our Lady, Franciscan, based on the teachings of Saint Francis of Assisi, or Ignatian based on the spiritual principles of Saint Ignatius of Loyola. The understanding and living of the spiritual identity of the institute by its members contributes to its [institute] preservation.

The character of the institute is what Santos refers to as “the special familial atmosphere

⁷³ See footnote no. 21 of Chapter Three.

⁷⁴ See *IBVM Constitutions*, 12.

of the institute [...] to give public testimony to Christ.”⁷⁵ In other words, it points to the ministerial nature of the institute, that is, its mode of living and carrying out its founding vision. An institute therefore is either conventual, or monastic, or integrally apostolic in character.⁷⁶ This does not mean that one group does not incorporate some of the elements of the other. Indeed, universal law requires that all religious institutes practise ascetism according to their character. This clarity is very important in understanding the identity of the institute as this has implications on the manner of living community life and the vows. Some institutes, while founded mainly as conventual, over time, adopted practises which are more appropriate for an apostolic community, thus causing conflicts and confusion among members. As Morrissey notes, “it is very important for institutes to know their character [...] since until they know it [...] it is almost impossible to organize proper formation programmes for new members, or to integrate new members into the group because the expectations are so different.”⁷⁷

The sound traditions refer to particular practices which have been part of the institute from the beginning, for instance, certain devotions or practices inspired by spiritual experience of the founder[s]. For the Institute of the Blessed Virgin Mary, the Foundress had special devotion to our Lady of Loreto. Also, in honour of Our Lady of Loreto, Teresa Ball, the founder of the former Irish Branch, dedicated to Our Lady all houses and institutions related to the Institute. The present IBVM members still cherish this devotion and celebrate solemnly certain

⁷⁵ SANTOS, “The *Ratio formationis*,” 141.

⁷⁶ See R. MCDERMOTT, “Commentary on Norms Common to All Institutes of Consecrated Life (cc. 573–606),” in *CLSA Comm2*, 747.

⁷⁷ F.G. MORRISEY, “Institutes of Consecrated Life and Societies of Apostolic Life (Canons 573-746),” class notes, Ottawa, Faculty of Canon Law, Saint Paul University, 2005-2006, 25.

Marian feasts.⁷⁸

The notions of the spirit, character, purpose and spirituality are inter-connected. The definition of the spirit of the institute contributes to maintaining its purpose and nurtures its spirituality. It is the expression of this inter-connectedness which defines the identity of an institute. An understanding of the institute's identity clearly articulated to members during their formation, enriches their personal sense of belonging and their confidence to be identified with the institute. This positively contributes to their discernment process and resolve to undertake a permanent commitment.

Canon 659 § 1 stipulates that post-novitiate formation is to be in accord with the purpose and character of the institute, which in essence, constitutes its identity. Pope Francis in his letter to all consecrated persons on the occasion of the inauguration of the Year of Consecrated Life, states that knowledge of the historical background of a religious family is essential for preserving its identity and for strengthening its unity as well as for reinforcing the common sense of belonging of its members.⁷⁹ The instruction on inter-institute collaboration for formation adds that it is the task of the institute to hand over its spiritual patrimony to the new members.⁸⁰ Santos concurs when he remarks that “the institute lives by reason of its identity which it receives from its members.”⁸¹ He adds that the vitality of the spirituality of an institute is maintained in and through formation of its members.⁸² Knowledge and understanding of the

⁷⁸ See footnotes nos. 38-39.

⁷⁹ See *Scrivo a voi*, no. I (2), in *AAS*, 106 (2014), 938, in *L'Osservatore Romano*, December 5, 2014, 17. Cf. c. 578.

⁸⁰ *Attenta alla condizioni*, no. 3, in *Enchiridion Vaticanum*, vol. 17, 1341, in *CLD*, vol. 14, 592.

⁸¹ SANTOS, “The *Ratio formationis*,” 141.

⁸² See *ibid.*

identity of an institute is, therefore, a vital part of formation endeavour.

Constitutions of the IBVM describe its identity from the view point of its foundational charism and spirituality considered in the ecclesial context.⁸³ The *Formation Handbook* emphasizes the process of learning of the institute's spirituality, history and tradition in the context of the contemporary theological understanding of the Church and of consecrated life.⁸⁴ There is, however, no specific content in the Handbook which treats on the meaning of consecrated life and its role and place in the Church in the context of formation.

Recent challenges relating to the diminishing visibility of consecrated life as a result of the decrease in numbers, with very few new members joining institutes of consecrated life in the Western world and related diminished participation in the Church's apostolic works call for a deeper understanding of the meaning of religious life, lived according to the particular charism and spirituality of a given institute. Formation, therefore, is to present the members with a clear understanding of the identity of religious life in general and how this identity is lived and witnessed in a specific institute.

Lack of proper and clear understanding of the institute's identity by members may lead to what Santos refers to as crisis of identity in religious institutes.⁸⁵ This is a situation whereby the institute lacks clarity on the essential elements of religious life and members are unable to define the purpose of existence of an institute. As Santos further explains, the identity of the institute is the identity of the members and, conversely, the crisis of identity of the institute translates into a

⁸³ See IBVM *Constitutions*, 1.1-1.15

⁸⁴ See *Formation Handbook*, 62.

⁸⁵ See SANTOS, "The *Ratio formationis*," 138.

crisis of religious identity in the members.⁸⁶ Once an institute is unable to articulate its identity, the purpose of the charism disappears from the collective horizon of perception and it is soon replaced by the individual purposes of the members. The spiritual and juridical unity of the institute is thus jeopardised by diverse ideas and proposals of individual members and it is the members who then superimpose their own identity on the institute. Consequently, the founding charism is subjected to ambiguity in its interpretation, hence unable to attract vocations as candidates to religious life are rather inclined to seek membership in institutes which articulate their identity with clarity.

As the discussion in this section has shown, a systematically presented content on the identity of the Institute which includes the elements presented in c. 578 is lacking in the formation programme yet its understanding by members is significant for the survival of the Institute's charism. We therefore recommend that a segment dedicated to the content of the spiritual patrimony of the Institute be included in the *Formation Handbook*. This is to enable those in formation to be familiar with the various elements which make up the identity of the Institute and to identify its uniqueness in relation to other institutes. In this way, they will be able to acquire the necessary knowledge of the Institute's identity and live and witness to it with fidelity.

4.3.2. Mission of the Institute

Mission is an aspect of the life of the Institute which requires specific attention during formation. If the sisters are to carry out the mission of the Institute more effectively, it is only

⁸⁶ See *ibid.*, 143.

proper that they understand and appreciate the mission of the Institute in all its aspects. These aspects include, firstly, the ecclesial character of mission, secondly, its inspirational foundation as was envisioned by the Foundress, thirdly, the values and principles which guide the choices and decisions with regard to mission, and lastly, the relationship between the one mission of the Institute and its diverse expressions in the different ministries undertaken by members of the Institute.

From the very beginnings of the Institute, the Foundress was clear that her enterprise was centred in the Church. It is her great love for the Church which motivated her deep desire to reconcile people to the faith and to empower them to active participation in the Church. The ecclesial disposition of Mary Ward's mission, as Gill Goulding observes, was so profound that even when the institutional Church ill-treated her, she remained loyal and did not hold any bitterness or resentment.⁸⁷ Goulding further explains that this is the fidelity required for mission of the Institute which is fulfilled in the name of the Church.⁸⁸ As women at the heart of the Church, carrying out the mission of Christ, it is important that this mission originally inspired in the Foundress by the Spirit of God and faithfully handed down by her companions, is profoundly understood from its ecclesial context.

In his apostolic letter on the Year of Consecrated Life, Pope Francis challenges all consecrated persons to examine their fidelity to the mission entrusted to them. He calls on each religious family to evaluate its faithfulness to the vision of founders in their works and lives and the relevance of their ministries in responding to the needs of the present times.⁸⁹ Fidelity to the

⁸⁷ See G. GOULDING, *A Church of Passion and Hope: The Formation of an Ecclesial Disposition from Ignatius Loyola to Pope Francis*, New York, Bloomsbury, 2016, 161.

⁸⁸ See *ibid.*

⁸⁹ See *Scrivo a voi*, no. I (2), in *AAS*, 106 (2014), 938, in *L'Osservatore Romano*, December 5, 2014, 17.

mission of the institute and its appropriate interpretation in accord with the signs of the times requires that members have a clear idea of the meaning of their mission.

The *Formation Handbook* states that spiritual formation is to include developing an ecclesial sense, learning how to think with the Church in a mature way.⁹⁰ However it does not give further specifications on how this “developing of the ecclesial sense” or “learning how to think with the Church” are to be accomplished. Tensions between religious institutes and the ecclesiastical authorities are not new. It has been a long-time practice that the IBVM members undertake works assigned to them by parish or diocesan authorities. In the present times, there have been more and more occasions of collaborative initiatives in ministry, especially with Church leadership in most parts of the Institute. This calls on training in skills of collaboration and understanding of the role of both the Church and the Institute with regard to mission. For the reasons mentioned above, an understanding of the ecclesial context of the mission of the Institute merits particular focus. Temporarily professed members have to be orientated in the understanding of the mission of the Institute in the context of the overall mission of the Church.⁹¹ They are to be helped to grasp the theological basis of mission as a divine mandate of the Church to which she calls upon all the faithful to participate in the mission of Christ.⁹²

By means of diverse ministries, individuals and structures within the Church fulfil the one mission of Christ. Doris Goettemoeller explains that while the mission of the Church is carried out in many different activities, such as preaching, healing, reconciling or teaching, none

⁹⁰ See *Formation Handbook*, 63.

⁹¹ See *IBVM Constitutions*, 2.4.

⁹² See *LG*, no. 17, in *AAS*, 57 (1965), 5, in *FLANNERY I*, 368.

of them can be identified completely with it.⁹³ The totality of the mission of the Church is an eschatological ideal, that is, its fulfilment is in the realization of humanity attaining complete unity in Christ who is the light of the world.⁹⁴ Religious and members of other forms of consecrated life participate in the mission of Christ through the works they carry out according to the nature, purpose and character of a particular institute (c. 675 § 1).

The sisters in formation are also to be helped to understand and appreciate the foundational inspiration of the mission of the Institute. Such knowledge would enrich their understanding of the purpose of the Institute, how the mission was shaped through history and what has influenced its present expression. Recalling the origins of the mission, the Foundress of the Institute was motivated by human needs. Catholics in England were undergoing religious persecution; consequently, the Catholic faith was under threat of extinction. Since Catholic schools which the State had closed down were the main source of education for women, there was a growing crisis of uneducated women. These two situations required that the Catholic faith be restored and some means of educating the Catholic women in England be found.⁹⁵ This was the need to which Mary Ward responded. She needed companions, a rule and ecclesiastical approval to accomplish her project. In order to get insights on what kind of body or rules and what qualities her members were to have to be apt for the mission, she sought for light from God, hence the practice of discernment and contemplation as ways of proceeding in mission in the Institute. For approval which never materialized in her lifetime, she needed to trust in God's

⁹³ See D. GOETTEMÖLLER, "The Changing Mission of Religious Life," in L.A. QUIÑONEZ (ed.), *Starting Points: Six Basic Essays on the Experience of US Women Religious*, Washington, DC, LCWR, 1980, 15.

⁹⁴ See *LG*, no. 1, in *AAS*, 57 (1965), 20-21, in *FLANNERY I*, 350.

⁹⁵ See L. BYRNE, "Mary Ward's Vision of the Apostolic Religious Life," in *The Way Supplement*, 53 (1985), 74.

providence. The mission of the Institute was therefore shaped by discernment and disposition to God's providence and the enlightenment confirmed by her three spiritual experiences.⁹⁶ This became the foundation of her companions being "contemplatives in action." Pope Francis reminded all consecrated persons that prayer is the source of the fruitfulness of mission;⁹⁷ formation therefore is to help the temporarily professed to integrate contemplation and action in ministry.

The Constitutions of the Institute of the Blessed Virgin Mary present mission as the pivot from which all other aspects of life rotate.⁹⁸ Understood from an Ignatian perspective, the Institute itself exists *because* of the mission. Those called to the Institute are called to be sent.⁹⁹ Fulfilling the mission, therefore, requires that all energies, resources, talents and time of the members be translated into apostolic service. In the light of the vow of obedience, members of the Institute embrace what O'Connor refers to as an attitude and spirit of availability and openness to being sent.¹⁰⁰

The mission of the Institute has remained the same, nevertheless its scope, expression, and dimensions were changing in view of the circumstances of time and place. In fidelity to the vision of Mary Ward, the Institute claims one mission, that is, reconciling humanity to God by the means of good works that bring justice and freedom to humanity, performed in the name of the Church. The mission of the Institute has its foundation in the gospel values and Mary Ward's

⁹⁶ See HONNER, "Mary Ward, 49. Cf. footnotes nos. 18-20 of Chapter Three.

⁹⁷ See *Scrivo a voi*, no. I (2), in *AAS*, 106 (2014), 938, in *L'Osservatore Romano*, December 5, 2014, 17.

⁹⁸ See, for instance, the following IBVM constitutions: on community (3.18), formation (3.5) and governance (6.1-6.3); they are all linked to mission.

⁹⁹ See BYRNE, "Mary Ward's Vision," 77.

¹⁰⁰ See D.F. O'CONNOR, "Obligation and Rights," in HITE, HOLLAND, and WARD (eds.), *A Handbook on Canons 573-746*, 190.

spirituality. It is characterized by a spirit of commitment to the promotion of the common good, justice and right relationship with the universe and most important of all, care of faith and education which have always remained central to the mission.¹⁰¹ Apostolic activities are guided by the principles of collaboration, dialogue, cooperation and accountability.¹⁰² Moreover, in recent times, there has been an ongoing invitation to all members of the Institute to consider their availability for missioning across the Institute.¹⁰³ Sisters in formation are to be helped to understand the unity of the mission of the Institute undertaken either in being or in doing and expressed in the diverse ministries which include works of justice and education. Despite the diversity of ministries, the one mission of the Institute is being fulfilled, as the Constitutions put it, “[...] we are conscious that wherever each member is, the whole Institute is present.”¹⁰⁴

Given the significance of mission in the life of the Institute, it is of importance that those in formation are helped to understand and appreciate it in all its facets. This includes learning it in its ecclesial and historical context, its rootedness in the charism of the Institute, its expression in the many diverse ministries and appreciating the continuous endeavours of interpreting it according to the signs of times. We therefore propose that the *Formation Handbook* includes a section dedicated to the content of mission, outlining all the dimensions listed above as part of formative content. Clarity on the meaning of the mission of the Institute will enable the new members to make the choice of appropriate ministries and help them towards greater fidelity to

¹⁰¹ See IBVM *Constitutions*, 2.5-2.10.

¹⁰² See *ibid.*, 2.11-2.12.

¹⁰³ See, for instance, a letter from the Institute’s leader to all members thanking one sister who had responded to the invitation of cross- cultural missioning and, at the same time, inviting all members to consider a similar move (M. MORIARTY, letter, November 21, 2007, in CPAT, Central Leadership Correspondence, Box 109). See also a letter from the Institute leader to all members, inviting them to consider the availability for missioning across the Institute in those parts which require extra help, support and personnel. See N. COSCARDEN, letter, October 7, 2015, in CPAT, Central Leadership Correspondence, Box 109.

¹⁰⁴ IBVM *Constitutions*, 3.19.

the apostolic dimension of the Institute.

4.3.3. The Temporarily Professed

One other area which would enrich the formation programme during the period of temporary vows is a greater focus on the person of the temporarily professed sister. This is especially so because those in temporary profession belong to a generation whose worldview and mentality are different from the generation of the older members they encounter in the Institute. The values and concepts which the present generation holds, if not well understood, may be mistaken as evidence of lack of a vocation to religious life or to the life of a particular institute. Likewise, if generational gap and specific world outlook of the younger members are not properly addressed, they may jeopardize the formation process. This is especially from the perspective of ascertaining the suitability for lifelong commitment. The outcome of a formation process requires, among other things that through those involved with the formation of a member, the institute comes to know the individual well enough to admit her to permanent membership. It is, therefore, important that the programme of formation takes into consideration the worldview of the present generation entering religious life. This will require deliberate initiatives of dialogue and understanding among all members in the institute so that the generational difference does not become an opportunity of misunderstanding but rather a source of enrichment for both the young and the old. An institute which understands its younger members' worldview and mentality is better suited to form them by helping them transform the principles they already possess into concrete practical values aimed at the gospel ideal of love for neighbour (Mt 25: 34-46).

The Institute's programme of formation during temporary vows appears to emphasize

the demands for mission over the needs of the person in formation. The training, studies, acquisition of skills and all kinds of resources made available to her during formation are for apostolic effectiveness. The psychological, spiritual, academic and theological preparation during formation is geared towards the effectiveness of the mission.¹⁰⁵ However, while training for apostolic effectiveness is important, especially in an apostolic religious institute like the Institute of the Blessed Virgin Mary, nevertheless, equally significant is the focus on the person of the temporarily professed, her worldview, the understanding of the cultural and social context which has shaped her personality. All these factors affect her response to the formation process and her ultimate resolve to seek permanent membership. As Jordan Hite notes, “the training is not only to be helpful in ministry and enable a member to faithfully live the life of the institute but should also provide a measure of self-worth and esteem.”¹⁰⁶

For post-novitiate formation to fulfill its aims, canon 660 stipulates that this stage of formation is to be adapted to the capacity of the individuals, that is, their ability in terms of intellectual capabilities, character and affectivity. In other words, the post-novitiate formation is to consider the circumstances of the one being formed. *Vita consecrata* adds that formation should involve the whole person, in every aspect of the personality, including behaviour and intentions, that is, a characteristic of wholeness.¹⁰⁷ *Potissimum institutioni* notes that the social and the cultural context of the person in formation has great impact on how the individual responds to the formation process as these elements influence their world view, and their

¹⁰⁵ See *ibid.*, 5.3-5.4.

¹⁰⁶ HITE, “Admission of Candidates and Formation of Members,” 164.

¹⁰⁷ See *VC*, no. 65, in *AAS*, 88 (1996), 440-441, in *L'Osservatore Romano*, April 3, 1996, supplement, 12.

understanding and contribution to their own formation.¹⁰⁸ The instruction on inter-institute collaboration for formation concurs when it states: “In particular, in order to respond better to the demands proper to this phase of formation, inter-institute initiatives of collaboration should be mindful of the characteristics and circumstances of life of those professed of temporary vows.”¹⁰⁹

While the worldview and attitudes of the present generation of the Institute’s members are shaped by the contextual cultural and social circumstances of their individual backgrounds, they also share common characteristics in terms of their mentality. Gambari attempts to offer a comprehensive description of the mentality and attitudes of the present generation. On the positive side, he mentions the attitude of self-affirmation, strong sense of justice, sincerity and self-expressiveness, sensitivity to communitarian values and a sense of universality. As to self-affirmation, Gambari explains that the youth of today desire to be known individually and that their personal values, aspirations and that their own capabilities be taken into account. They like to be treated like adults and often training which promotes uniformity is seen as denial of human dignity. They tend to be independent and wish to be free to discover their own way of life and act through their own experience.¹¹⁰ They have a thirst for freedom and authenticity. It is a generation whereby people do not hesitate to reveal their identity and to express their aspirations.¹¹¹

The young people of today’s generation tend to have a strong sense of justice rooted in their appreciation of the value of human dignity. Those who have not been corrupted by secular

¹⁰⁸ See *PI*, no. 88, in *AAS*, 82 (1990), 520, in *Origins*, 19 (1989-1990), 695.

¹⁰⁹ *Attenta alla condizioni*, no. 17(b), in *Enchiridion Vaticanum*, vol. 17, 1356, in *CLD*, vol. 14, 607.

¹¹⁰ See GAMBARI, *The Religious Adult in Christ*, 231. See also *PI*, no. 87, in *AAS*, 82 (1990), 520-521, in *Origins*, 19 (1989-1990), 694.

¹¹¹ See *PI*, no. 88, in *AAS*, 82 (1990), 520-521, in *Origins*, 19 (1989-1990), 695.

ideologies have a strong desire in contributing to the liberation of humanity from racism, underdevelopment, war and injustice. They like to engage in political, social, cultural, and charitable initiatives in order to transform human society.¹¹² They have a sense of sincerity and integrity, openly speak their mind and highly value what is true and authentic.¹¹³ In their quest for justice, the present generation sometimes tend to look at authority as a source of oppression against which they are to defend themselves and others. At times, therefore, the dignity and role of authority may be undermined by them.¹¹⁴ It is the responsibility of those involved in the training of the temporarily professed to direct these attitudes towards embracing true ideals and help them cultivate a positive sense of justice which promotes respect of every person according to a correct hierarchy of values.

Another attitude Gambari identifies with the present generation is a great sensitivity to communitarian values. Those who belong to this generation have a great desire for fraternal life and authentic friendships. They like teamwork, pooling together, collaboration, so group experience in community would be of great importance to them in the context of formation.¹¹⁵ Formation incorporating these aspects will be able, as Gambari argues, to help channel the interior resource of friendship and the sense of communality into a more effective union of members of the same religious family where everyone is accepted with their gifts and limitations and where members are bonded by fraternal love, all working toward the same mission of the

¹¹² See *ibid.*, no. 87, in *AAS*, 82 (1990), 520-521, in *Origins*, 19 (1989-1990), 694.

¹¹³ See GAMBARI, *The Religious Adult in Christ*, 231.

¹¹⁴ See *ibid.*

¹¹⁵ See *ibid.*, 233.

institute.¹¹⁶

The present generation tend to have a great sense of universality. They live in a society of global connections and networking through social media. As human society is more and more interrelated, the younger generation is more and more in touch with the world and its problems. They are sensitive to the problems of humanity and are conscious of their contribution to its unity.¹¹⁷ Formation should help them put such attitudes at the service of the universal Church and all humanity without being limited to a determined place, that is, to achieve the universal sense of mission. Gambari points, however, to the danger of unhealthy preoccupation with global issues, which may lead to a neglect of fidelity in fulfilling small duties of daily life, like prayer and moments of solitude which may be considered to be too insignificant in view of the vast universal problems.¹¹⁸ This challenge calls for reinforcement of spiritual formation; those involved in formation are to help the younger members to understand that the great problems of the world are sometimes best solved by personal renewal and fidelity in growing union with God.

On the negative side, Gambari observes that the present generation tends to exhibit premature maturity. They appear to want instant gratification and can be impatient and intolerant in situations which demand patience which is an expression of lack of maturity. They tend to be quick consumers of information and experiences without the ability to assimilate the data with a proper critical spirit. This attitude poses danger for their internal autonomy and capacity for integration. Without being aware of it, as Gambari notes, they tend to reveal immaturity even as

¹¹⁶ See *ibid.*

¹¹⁷ See *ibid.*, 234.

¹¹⁸ See *ibid.*, 235.

they claim maturity.¹¹⁹ In view of that, solid and harmonized formation which emphasizes ascetism is crucial. The formation is to help the young members deepen their inner integration and union with God.

Gambari further remarks that the present day generation also has a tendency towards superficiality and instability. They tend to lack the capacity for personal reflection and solitude. This makes some of them remain “on the surface,” exposed to every kind of idea, insecure and unsettled within themselves. It is a generation characterized by fear of assuming absolute commitment and great difficulty in persevering to the point that at the slightest experience of a challenge, they easily fall into the temptation of giving up.¹²⁰ Such an attitude calls for vigilant and attentive patience and for gradual initiation into solitude and discipline in spiritual life. The programme is to provide for time and space for solitude and silence which help foster contemplation and assimilation of the Word of God.¹²¹ Formation is also to help create an atmosphere of security whereby those responsible for formation are secure themselves and the programme is clear about the formation aims.

This outlook on life shared commonly by the young generation of today, with multiple positive elements, if well understood and channelled, can enable the sisters to make eventually a valuable contribution to the transformation of the society. As *Potissimum institutioni*, no. 86 affirms, young people are not necessarily motivated by religious principles, however, the positive values, like connectedness, communality, strong sense of justice, authenticity and respect for human dignity with which they tend to identify are already some expression of

¹¹⁹ See *ibid.*

¹²⁰ See *ibid.*

¹²¹ See *PI*, no. 39, in *AAS*, 82 (1990), 497, in *Origins*, 19 (1989-1990), 687.

evangelical values lived in religious life.¹²² Indeed, a strong sense of justice, authenticity and respect for human dignity are central to the mission of the Institute as they resonate with the values associated with its founding vision.¹²³ The temporarily professed in the Institute, most of whom belong to the present generation and who are oriented towards embracing connectedness, communality, strong sense of justice, authenticity and respect for human dignity are, therefore, a great resource in furthering its mission hence the mission of the Church.

Analysis of the proper law of the Institute shows that there is inadequate attention paid to the person of the temporarily professed in the formation programme. The temporarily professed is a unique human person whose personality and worldview has been shaped by the kind of society she has been brought up in. She is therefore to be known and understood not only from the context of her personality and cultural background, but also from the context of her generation as this too has implications on the process and outcome of formation. Since the majority of sisters in temporary vows in the Institute belong to the present generation, we recommend that the formation structure include provisions for greater focus on the person of the temporarily professed. Such provisions could imply organized opportunities of closer interactions and conversations between the temporarily professed and other members in the context of formation. Such interactions could also include sharing of life stories, exchange of ideas and accompaniment of the younger members by senior sisters so that the young may learn from the old and vice versa. In a more explicit manner, proper law could specify the modalities of such interactions. The local community would be a recommended place for such exchange.

¹²² See *ibid.*, in *AAS*, 82 (1990), 520, in *Origins*, 19 (1989-1990), 694.

¹²³ The foundress, Mary Ward, envisioned members of her Institute to be doers of justice and lovers of truth. See IBVM, *Constitutions*, 1.11.

4.3.4. Possibility of Revision of Certain Canons and Further Legislation on Temporary Profession

The main aim of juridical norms, as John Paul II pointed out when he promulgated the 1983 Code, is to preserve the right order in the Church.¹²⁴ However, experience shows that interpretation and application of certain norms in the context of new pastoral realities is a challenging task.¹²⁵ This has provoked efforts in evaluation of the juridical system of the Church and where necessary, appropriate changes have been made.¹²⁶ Ladislav Örsy adds that

¹²⁴ See JOHN PAUL II, apostolic constitution *Sacrae disciplinae leges*, January 25, 1983, in *AAS*, 75, part II (1983), xi, English translation in *Code of Canon Law, Latin-English Edition, New English Translation*, prepared under the auspices of the CANON LAW SOCIETY OF AMERICA, Washington, DC, Canon Law Society of America, 2012, xxix.

¹²⁵ Thomas Green attributes failures of particular norms to fulfil their purpose to poor formulation of laws which, at times, lead to ambiguity in their interpretation and confusion in their application, especially when they were confronted with certain pastoral realities and ministerial needs. See T. GREEN, "The Revised Code of Canon Law: Some Theological Issues," in *Theological Studies*, 47 (1986), 624.

¹²⁶ See BENEDICT XVI, apostolic letter motu proprio *Omnium in mentem*, October 26, 2009, in *AAS*, 102 (2010), 8, English translation in *L'Osservatore Romano*, English ed., March 31, 2010, 6 where the Pope states: "The norms ought to reflect, on the one hand, the unity between theological doctrine and canonical legislation, and, on the other, the pastoral usefulness of the prescriptions whereby ecclesiastical ordinances are directed to the good of souls. The more effectively to safeguard this necessary doctrinal unity and pastoral purpose, the Church's supreme authority, after careful deliberation, decides, from time to time, to make suitable changes or to introduce additions to the canonical norms." See also *Communicationes*, 38 (2006), 170-172 for a discussion concerning the changes in canons 1086 § 1, 1117, and 1124. In his explanation concerning the basis of the changes published in the motu proprio *Omnium in mentem*, the then Archbishop Francesco Coccopalmerio, the president of the Pontifical Council for Legislative Texts, concurs with the Holy Father on the necessity of such changes for the common good. See *L'Osservatore Romano*, English ed., March 31, 2010, 6 and 14. See also BENEDICT XVI, apostolic letter *Quaerit semper*, August 30, 2011, in *AAS*, 103 (2013), 569-571, English translation in *L'Osservatore Romano*, English ed., September 28, 2011, 7; ID., Apostolic Letter on Certain Modifications to the Norms Governing the Election of the Roman Pontiff *Normas nonnullas*, February 22, 2013, in *AAS*, 105 (2013), 253-257, English translation in *L'Osservatore Romano*, English ed., February 26, 2013, 7; ID., Apostolic Letter whereby the Apostolic Constitution *Pastor bonus* is Modified and Competence for Catechesis is Transferred from the Congregation for the Clergy to the Pontifical Council for Promoting the New Evangelization *Fides per doctrinam*, January 16, 2013, in *AAS*, 105 (2013), 136-139, English translation in *L'Osservatore Romano*, English ed., January 26, 2013, 4; ID., Apostolic Letter whereby the Apostolic Constitution *Pastor bonus* is Modified and Responsibility for Seminaries is Transferred from the Congregation for Catholic Education to the Congregation for the Clergy *Ministrorum institutio*, January 16, 2013, in *AAS*, 105 (2013), 130-135, English translation in *L'Osservatore Romano*, English ed., January 26, 2013, 5; FRANCIS, Apostolic Letter by which the Canons of the Code of Canon Law of the Latin Church Pertaining to Cases Regarding the Nullity of Marriage are Reformed *Mitis iudex Dominus Iesus*, August 15, 2015, Libreria editrice Vaticana, 2015, English translation in *L'Osservatore Romano*, English ed., September 8, 2015, 3-6; ID., Apostolic Letter by which the Canons of the Code of Canon Law of the Eastern Churches Pertaining to Cases Regarding the Nullity of Marriage are Reformed *Mitis et misericors Iesus*, August 15, 2015, Libreria editrice Vaticana, 2015, English translation in *L'Osservatore Romano*, English ed. September 8, 2015, 3-6; ID.,

review of ecclesiastical norms is part of canon law ministry.¹²⁷ Revision of juridical norms for greater pastoral effectiveness is, therefore, an ongoing endeavour within the ecclesial legal system.

The period during temporary profession is formative and probationary in nature. The formation of the member is structured in such a way that it provides the necessary orientation for the one in formation to assimilate what the life and works of the institute entail and the mechanisms to test his or her suitability for religious life in a particular institute. In view of such a structure in place, the relevance of certain canons merits re-evaluation. They are specifically the following: c. 696 § 2 on dismissal of members in temporary vows and c. 684 on transfer of members to another institute. The following section of the thesis discusses thus the prospect of revision of these canons and offers suggestions for possible legislation corresponding to a “feminine” model of formation.

4.3.4.1. Canon 696 § 2 on Dismissal of Members in Temporary Vows

Canon 696 states:

§ 1. A member can also be dismissed for other causes provided that they are grave, external, imputable, and juridically proven such as: habitual neglect of the obligations of consecrated life; repeated violations of the sacred bonds; stubborn disobedience to the legitimate prescripts of superiors in a grave matter; grave scandal arising from the culpable behavior of the

Rescript on the Process of Nullity of Marriage especially at the Roman Rota *L'entrata in vigore*, English translation in *L'Osservatore Romano*, English ed., December 12, 2015, 8; ID., Rescript on the Prior Consultation with the Holy See for the Erection of Diocesan Institutes, May 20, 2016 Libreria editrice Vaticana, 2016; ID., apostolic letter *Come una madre amorevole*, June 4, 2016, Libreria editrice Vaticana, 2016, English translation in *L'Osservatore Romano*, English ed., June 10, 2016, 4; ID., Rescriptum ex audientia pertaining to the Apostolic Letters motu proprio *Mitis iudex Dominus and Mitis et misericors Iesus*, December 7, 2015, English translation in *L'Osservatore Romano*, English ed., March 18, 2016, 9.

¹²⁷ L.M. ÖRSY, “Theology of Canon Law,” in *CLSA Comm2*, 9. Örsy explains that juridical reform is part of the ecclesial vocation of canon lawyers. As circumstances of times may demand it, canon lawyers should be in a position to propose changes in the legal system of the Church which are suitable according to the needs of new realities of the ecclesial community. See *ibid.*

member; stubborn upholding or diffusion of doctrines condemned by the magisterium of the Church; public adherence to ideologies infected by materialism or atheism; the illegitimate absence mentioned in c. 665 § 2, lasting six months; other causes of similar gravity which the proper law of the institute may determine.

§ 2. “For dismissal of a member in temporary vows, even causes of lesser gravity established in proper law are sufficient.”

According to the wording of the canon, besides the causes mentioned in cc. 694 § 1, 695 § 1 and 696 § 1, institutes are empowered by the law to establish in their proper law other causes of similar gravity that would merit dismissal of a member.¹²⁸ Arguably, the intent of the canon is to protect institutes from incorporating in a definitive manner persons not suitable for living religious life. From the perspective of its application, however, c. 696 § 2 provides for certain practical prospects of its reform.

The first is with regard to the principle of fundamental equality of all Christian faithful in dignity and action, pursuant to canon 208 and the right of equal treatment before the law, prescribed in canon 221. Recalling section 2.2.3 of Chapter Two of this study, rights and obligations proper to religious specified in canons 662-672 apply to all members equally and the only difference for those in temporary vows is that rights and obligations take a formative and probationary nature. Besides, on no occasion does universal law link rights and obligations to penal implications for those in temporary vows. From this argument, a conclusion can be drawn

¹²⁸ The proper law of the Institute of the Blessed Virgin Mary neither establishes additional causes of similar gravity to those in c. 696 § 1 that could lead to the dismissal of members nor indicates causes for dismissal which are specifically related to temporarily professed members. It stipulates, however, four main reasons which could lead to the dismissal of members which incorporate the causes mentioned in the universal law. First, if it is judged that “someone’s remaining in the institute would be contrary to the honour and glory of God,” due to incorrigible vices which bring scandal to others. See *IBVM Constitutions*, [210]-[212]. Second, if retaining one in the institute is judged to be a hindrance to the common good, for example, as result of illness concealed during admission that impedes the member from performing the tasks of the institute. See *ibid.*, [212]-[215]. The third cause is present if someone’s remaining in the Institute is seen to be simultaneously against the good of the Institute and of the individual, for instance, due to illness concealed during admission. See *ibid.*, [216]. The fourth cause is present if her remaining is seen to be contrary to the good of others outside the Institute for instance if it is discovered that such a member has marriage obligations from a prior bond or significant debts which were not disclosed at the time of admission which thereby invalidates her admission and consequently the religious profession according to c. 643. See *ibid.*, [217].

that as much as c. 696 § 2 aims at protecting the good of the institute, from the perspective of the member in temporary vows there is an appearance of discriminatory tenor of law which contravenes the spirit of fundamental equality of all the people of God envisioned in *Lumen gentium*, no. 33.¹²⁹

The second concern is with regard to the efficacy of the evaluation process during the period of temporary vows in view of the possibility of dismissal. The present study has discussed extensively the process of formation during the period of temporary vows, highlighting its aims and procedures towards reaching its desired outcome. Part of the process is the continuous periodic reviews and evaluations, prospectively leading towards renewal of vows at certain intervals. Presumably, such a process, if well carried out, takes care of situations of unsuitability without possibility of reforming a sister in formation and allows for discontinuation of the process if its desired outcome is not foreseen. With such a structure already in place and with the tedious dismissal process (which sometimes even reaches beyond the time period determined for expiry of temporary vows), the efficiency of the process of dismissal as an option over exclusion from making further profession remains debatable. Indeed, many commentators admit the difficulty in the application of this norm and recommend the option of exclusion from further profession as preferable.¹³⁰

Moreover, by way of comparison, the Eastern Code omits the norm on additional less grave causes for dismissal of temporarily professed religious mentioned in c. 696 § 2).¹³¹ Instead,

¹²⁹ See in *AAS*, 57 (1965), 39, in *FLANNERY I*, 390.

¹³⁰ See E. McDONOUGH, "Discretionary Dismissal," in *RfR*, 62 (2003), 96; F.G. MORRISEY, "Commentary on the Dismissal of Members (cc. 694-704)," in *Exegetical Comm*, vol. 2/2, 1870; S.L. HOLLAND, "Separation of Members from the Institute (cc. 684-704)," in *CLSA Comm2*, 867.

¹³¹ See ABBASS, *The Consecrated Life: A Comparative Commentary on the Eastern and Latin Codes*, Ottawa, Faculty of Canon Law, Saint Paul University, 2008, 414, where the author explains that the study group for

it establishes a separate procedure for dismissal of those in temporary vows in monasteries (*CCEO*, c. 499) and orders and congregations (*CCEO*, cc. 552).¹³² In particular, the norms specify the authority competent to initiate the process,¹³³ authority to dismiss¹³⁴ and the authority to confirm the decree of dismissal.¹³⁵ Omission of the provision for specific causes for dismissal of temporarily professed religious in the Eastern Code does not appear to be a limitation to the process of ascertaining unsuitability for religious life which may warrant dismissal of such religious.

the drafting of the Eastern Code was not in favour of the proposal to enumerate more reasons for dismissal of temporarily professed religious as they pointed to the fact that the causes may also be “of lesser gravity” (cf. c. 696 § 2). Unlike the Latin Code which requires causes listed in cc. 694 § 1, 695 § 1, 696 § 1 which must be grave, external, imputable and juridically proven, with the additional causes of lesser gravity indicated in 696 § 2, the Eastern Code requires that causes be grave, external and imputable but not necessarily formally proven (*CCEO*, c. 552 § 2, 3°). It also prescribes a simplified process which only requires that causes for dismissal be made known to the member and opportunity for self-defense be granted to him or her. See *ibid.*, 416-418. This is different from the Latin Code which requires the major superior to hear the council, collect proofs, issue warnings, provide the member with opportunity for self-defense and forward the acts to the supreme moderator. See also MCDERMOTT, “Two Approaches to Consecrated Life,” 230.

¹³² See ABBASS, *The Consecrated Life*, 259.

¹³³ Unlike the Latin Code which assigns the major superior the task of initiating the dismissal process (c. 697, 1°), the Eastern Code does not designate the major superior to the task of initiating the process of dismissal. The implication is that even local superiors can handle the initial stage of dismissal. See ABBASS, *The Consecrated Life*, 268. Abbass clarifies that such a provision would be for the reason that, “in many cases, Eastern religious institutes are not divided into provinces, it is often the same superior who conducts the initial procedure and issues the dismissal decree” (*ibid.*, 269).

¹³⁴ The Eastern Code prescribes that in monasteries, a religious in temporary vows can be dismissed by the superior of the monastery *sui iuris* with the consent of the council and confirmation by the eparchial bishop, or by the patriarch if particular law decrees it for monasteries situated within the territorial boundaries of a patriarchal Church (*CCEO*, c. 499). In orders and congregations, the competent authority to dismiss is the superior general with the consent of his or her council unless proper law reserves the dismissal to the eparchial bishop or another authority to which the order or congregation is subject (*CCEO*, c. 552 § 1). This differs from the Latin Church whereby the authority to dismiss is the supreme moderator together with the council voting collegially and secretly (699 § 1) and the diocesan bishop for autonomous monasteries (699 § 2).

¹³⁵ Jobe Abbass has the opinion that even though not explicitly indicated, this rule may also be interpreted as to apply to monasteries of pontifical right by analogy of *CCEO*, c. 496 § 1 where the bishop has competence to grant an indult of departure to a temporarily professed religious even for monasteries of pontifical right. See *The Consecrated Life*, 260. In orders and congregations, the superior general with the consent of council is competent to issue a decree of dismissal without need for confirmation by external ecclesiastical authority unless the institute’s statutes reserve the dismissal to eparchial bishop, patriarch or the Holy See (*CCEO*, 552 § 1). See *ibid.*, 414. In the Latin Code, dismissal takes effect only after it has been confirmed by the Apostolic See for institutes of pontifical right and by the bishop of the house of assignment of the dismissed religious for institutes of diocesan right (c. 700).

The third difficulty is the possible ambiguity which may arise from determining in the proper law “causes of lesser gravity” which are sufficient for dismissal of members in temporary vows. The dilemma of determining these causes of lesser gravity in the proper law has four aspects.

First, while the legislator empowers institutes to prescribe additional causes of lesser gravity for the dismissal of those in temporary vows, no parameters for these causes are provided. It is therefore left to institutes to decide what such causes are to be. That presents the authority of the institute with a possible dilemma on how to specify the causes, different than those on the list provided by universal law in canons 694-696 and which would apply specifically to those in temporary vows. Another pertinent question concerns the criteria for determining the qualification of behaviour to motivate dismissal for temporarily professed in the proper law in accord with the requirements of universal law.

Secondly, to speak of “causes of lesser gravity suffice for dismissal [...]” (c. 696 § 2) while at the same time the law demands that for dismissal from an institute “[...] the cause[s] must be grave [...]” (c. 696 § 1) appears contradictory and confusing.¹³⁶ The parallel norm in the Eastern Code for instance does not include the provision for causes of lesser gravity which warrant dismissal of temporarily professed religious (*CCEO*, c. 552 § 2).

Thirdly, religious institutes in this case have the power to formulate the causes of lesser

¹³⁶ Viewed in the context of the penal system of the Church, c. 695 § 2 shows some contradictions. First, to empower particular law to establish additional causes which are of a lesser gravity as grounds for inflicting such an extreme measure as dismissal of a religious appears to contradict the general principle of equity in the ecclesial legal system (cf. for instance, cc. 193 § 1, 221 §§ 2 and 3, 1321 § 1). As the most severe measure which can be inflicted on a religious, it should be justified by a *grave* cause. Second, as a general principle, universal law urges discretionary caution in providing for particular legislation which modifies a person’s canonical status. See, for instance, canon 1317 which prohibits particular law from laying down dismissal from the clerical state. Analogously, this should also apply to religious in temporary vows. However, canon 695 § 2 empowers religious institutes to establish additional norms for dismissal of such members.

gravity which warrant dismissal of temporarily professed mentioned in c. 696 § 2 but lack the capacity to dictate its outcome. This is so since the dismissal process necessarily follows the provisions of the universal law and it is the competent ecclesiastical authority who confirms the decree of dismissal (c. 700).

Lastly, in view of the formative nature of the period during temporary vows which provides for gradual initiation into the life of the institute, a question arises if it would not be more charitable to treat such causes which warrant dismissal under reasons for exclusion from further profession of vows.¹³⁷

In conclusion, it can be noted that while the canon in question may have been drafted with the best of intentions of preserving the greater good, from the analysis of its application, it appears to imply that the status of a religious in temporary vows diminishes his or her right to fundamental equality and dignity and to due judicial process. Also, causes which may warrant dismissal of a religious are mostly based on certain acts or behaviours which are habitual and incorrigible even after the experience of remedial help and support. Ordinarily, during the period of temporary vows, such causes are dealt with in the context of formation and resorting to the dismissal process may not be necessary, unless it is the case of automatic dismissal stated in canon 694. Our recommendation, therefore, is that the relevance of canon 696 § 2 be evaluated with a possibility of abrogating it on the occasion of the eventual revision of the law for

¹³⁷ Joseph F. Gallen, however, advocates retaining the norm on causes of lesser gravity as a reason for dismissal of temporarily professed religious in order to clearly distinguish dismissal from exclusion from further profession. He argues that since the period during temporary profession is probationary, not only culpable causes of lesser gravity but also other undesirable personal characteristics for which a member might not be culpable should not be tolerated in the temporarily professed member by an institute as their magnitude may increase after perpetual vows. By way of example, he mentions: insufficient general aptitude for the works of an institute or for community life, insufficient intellectual ability or health as these sometimes are more clearly manifested during the period of temporary vows as causes which would warrant dismissal of a temporarily professed member. See J.F. GALLEN, "Questions and Answers," in *R/R*, 42 (1984), 143.

religious.¹³⁸

4.3.4.2. Canon 684 on Transfer to Another Institute

In the 1983 Code, canons 684 and 685 treat of transfers of those who are members of religious institutes, canon 730 treats the transfers of members of secular institutes (cc. 701-730), while canon 744 addresses transfers for members of societies of apostolic life (cc. 731-746). Canon 684 provides the details of the process of transfer. The process requires that the member who desires to transfer writes a petition to the competent major superior of the institute of origin (*a quo*) and to the one to which the member intends to transfer (*ad quem*) who, with the consent of their councils, may grant the permission (c. 684 § 1).¹³⁹ With a positive response from both institutes, the member undergoes a period of probation lasting at least three years. At the end of this period, the law offers three possibilities, the member may either be admitted to profession, be denied admission, or the member may refuse to make profession in the new institute. In the case of admission to profession, the member is ascribed to the new institute and acquires all the rights and obligations in it. On the occasion of non-admission by the institute *ad quem* or refusal

¹³⁸ For further reading on dismissal from religious institutes, see B. EARL, "Different Models of Authority in Dismissal from Religious Life," in *Angelicum*, 58 (2008), 1143-1152; J.F. GALLEN, "Dismissal of Religious for Health Reasons," in *RfR*, 25 (1966), 616-1105; ID., "What is New in the Canon Law on the Dismissal of Religious," in *RfR*, 35 (1976), 135-136; ID., "What is the Accurate Meaning of an Exclusion from a Further Temporary or Perpetual Profession?" in *RfR*, 34 (1975), 478-479; E. McDONOUGH, "Discretionary Dismissal," in *RfR*, 62 (2003), 96-102; B. PFALLER, *The Ipso Facto Effected Dismissal of Religious*, Canon Law Studies, no. 259, Washington, DC, Catholic University of America, 1948; S. GOYENECHE, "Dismissal from Religion," in *Commentarium pro religiosiss*, 41 (1960), 69-72; P. LYONS, "A Rite for Those Departing Religious Life," in *RfR*, 53 (1994), 103-106; J. HITE, "The Discipline and Dismissal of Religious as Seen by the Secular Courts of Canada," in *Studia canonica*, 11 (1977), 115-144; A. GUTIERREZ, "De dimissione religiosorum: jurisprudentia recens," in *Commentarium pro religiosiss*, 55 (1974), 222-243, 313-322; A. HILL, "Denial of Profession," in *RfR*, 47 (1988), 934-939; S. HOLLAND, "Policies When a Member Leaves Religious Life," in *Informationes*, vol. 26, no. 2 (2000), 125-138.

¹³⁹ Besides the consent of the council, the proper law may include additional requirements, like certain information concerning the apostolic experience, medical history, status of freedom from canonical or civil penalties, just motivating reasons for the transfer. See S.L. HOLLAND, "Separation of Members from the Institute (cc.684-704)," in *CLSA Comm2*, 852.

to make profession in it by the member, he or she is to return to the institute of origin which has the obligation to receive him or her back (c. 684 § 2).

Universal law sets no limits to the power of the competent internal authority to approve transfer of members between two religious institutes. If the transfer is to be made to an institute of different canonical categories, for instance, from a religious institute to a secular institute or a society of apostolic life, permission from the Holy See is to be sought and its subsequent decision followed (cc. 684 § 5; 730; 744 § 2). Likewise, the 1983 Code has no provisions for transfer from a religious institute, or secular institute or society of apostolic life to either the status of a hermit (c. 603), of the order of virgins (c. 604), nor is there any provision for transfer from a religious institute to any type of association of the faithful (cc. 298-329). For transfer from one autonomous monastery to another monastery of the same institute, federation or confederation, approval is a matter of internal competent authority of the monasteries concerned (c. 684 § 3). Universal law requires no further probation or profession of vows on the basis of being the same religious family who share the same constitutions.¹⁴⁰

From the wording of canon c. 684 § 1, one could conclude that the canonical process of transfer is limited only to those in perpetual or definitive commitment. Canon 684 departs from the legislation of 1917 Code on the same.¹⁴¹ The process of drafting c. 684 records diverse opinions on the decision to exclude temporarily professed members from the process of transfer.

¹⁴⁰ The 1917 Code stipulated different types and procedures of transfer: 1) to another religious institute; a new novitiate and profession were required (*CIC/17*, c. 633 § 1), 2) to another monastery of the same order; no novitiate or profession was required (*CIC/17* c. 633 § 3). The 1917 Code required the supreme moderator to have authorization from the Holy See before granting an indult of transfer (*CIC/17*, c. 632). Cf. HOLLAND, “Separation of Members from the Institute,” 852. These norms were reordered and simplified by the 1983 Code.

¹⁴¹ The transfer of a religious in temporary vows was contemplated in *CIC/17*, c. 633 § 2 and such a religious, unlike one in perpetual vows, was not obliged to return to his or her original institute once his or her vows expired.

Earlier formulation had considered the possibility of allowing those in temporary vows to transfer to other institutes,¹⁴² however, the drafters decided to eliminate the possibility.¹⁴³ Canon 684 was, therefore, promulgated with the intention of excluding transfer of religious in temporary vows, a matter which provoked mixed reactions among some of its commentators.¹⁴⁴

From the onset, c. 684 was subject to variety of interpretations, especially with regard to its opening words which are formulated in the negative form.¹⁴⁵ In particular, the wording of

¹⁴² See *Communiones*, 13 (1981), 326 on canon 67 § 3 which states: “Qui tamen momento transitus professus est a votis temporariis, ad professionem perpetuam in novo Instituto admitti nequit nisi iterum peracto novitiatu et praemissa professione temporaria trium saltem annorum. Si autem sodalis hanc professionem emittere renuat vel a Superioribus competentibus non admittatur ad professionem emittendam ad saeculum redeat, dispensatus ipso iure a votis temporariis, si quae habeat” (the one who is temporarily professed at the moment of transfer cannot be admitted to perpetual profession in the new institute unless that person has gone through novitiate again and made temporary profession for at least three years. If the member refuses to make this profession or is not admitted by the competent superiors to make the profession, he or she shall return to the world, dispensed by law from the temporary vows, if the member has them [ABBASS, *The Consecrated Life*, 383]).

¹⁴³ Nine of the Consultors were in favour of the process of transfer to be strictly applicable only to the perpetually professed. See *ibid.*, 328 : “[...] sopprimere il § 3, restringendo il transito ai soli professi perpetui. Nel § 1, pertanto, si deve dire ‘Sodalis a votis perpetuis’ (placet 9)” ([...] suppress § 3, restricting transfer only to perpetually professed. § 1, therefore, should read “a member in perpetual vows” [9 are in favour]).

¹⁴⁴ Commenting on the norm shortly after the promulgation of the Code of 1983, Edward J. Gilbert remarks that excluding temporarily professed from transfer was a decision based on the mindset of the consultors that temporarily professed lacked the maturity in religious life to consider transfer. He argues that the requirement that the temporarily professed have to make a complete breakaway from religious life in order to consider joining another institute in the process of vocational discernment was rather a radical decision by the consultors. See E.J. GILBERT, “Separation from Religious Institutes,” in *The Jurist*, 44 (1984), 458. He further points out that even though the canon intended to regard maturity of the religious as a condition for transfer, perpetual profession in itself does not guarantee maturity in religious life. See *ibid.* In conclusion, he states: “I shall be interested to see as to this canon is tested by practice whether SCRIS will develop a policy with more pastoral sensitivity for those in temporary vows” (*ibid.*, 459).

¹⁴⁵ The negative wording of the c. 684 § 1: “A member in perpetual vows cannot transfer from one religious institute to another [...]” as Robert Ombres explains, seems to stress the fact that the legislator did not favour transfers. See R. OMBRES, “Separation from a Religious Institute by Transfer or Departure,” in *Clergy Review*, 70 (1985), 414. Historically, the Church has not always favoured transfer and only permitted it if and when it was ascertained that the motivation was of some spiritual benefit, for instance, the desire of greater perfection. This was because transfer was viewed as a threat to stability of religious life, especially in monastic institutes. See McDONOUGH, “Separation of Members,” 222. Thomas Aquinas regarded transfer of monks even to a more strict order as unlawful, seeing in it a form of neglecting one’s duty in fulfilling the obligations of the vows one had professed in a particular order. He admitted, however, that transfer could be tolerated for reasons of: zeal for a more perfect religious life, a genuine desire to remain faithful to the ideal of perfection that a religious order ought to have but was falling away from it, and health reasons which made one unable to fulfil the demands of one order but not of another (*Summa theologiae*, II-II, q. 189, art. 8, English translation FATHERS OF THE ENGLISH DOMINICAN PROVINCE, *The Summa Theologica of St. Thomas Aquinas*, vol. 4, 2007). Prior to the promulgation of the 1917 Code, the Church tried to curtail the practice of transfer. However, with the rise of apostolic congregations which

c. 684 § 3 appeared to some to include both temporary and perpetually professed religious, thus contradicting the norm of §1. Ambiguity in understanding c. 684 §§1 and 3 provoked consequently recourse to the Pontifical Commission for the Authentic Interpretation of the Code of Canon Law.¹⁴⁶ The response of the Commission that religious mentioned in c. 684 § 3 included the temporarily professed appears to imply that the norm of excluding temporarily professed from transfer is not absolute. The response provoked mixed reactions among commentators on the norm.¹⁴⁷

offered new alternatives for living religious life, transfer became more prevalent. Norms on transfer were eventually codified in the 1917 legislation, with elaborate procedures, and with the Holy See reserving to itself the competence of granting consent to all transfers as a further attempt to discourage the practice. See MCDONOUGH, "Separation of Members," 222. Likewise, the practice of transfer is not favoured in the Eastern legislation. See, for instance, J. ABBASS, "Transfer to Another Religious Institute in the Latin and Eastern Catholic Churches," in *Commentarium pro religiosus et missionariis*, 69 (1998), 127 where the author comments on the negative formula used in the Eastern Code in prescribing the norm on transfer of monks to another monastery *sui iuris* (CCEO, c. 487 § 1): "A member cannot transfer [...]." He explains that the norm was retained during the revision of the Eastern Code in order to preserve the long standing Eastern tradition of monastic stability. As a general rule, monks are expected to persevere throughout their lives in the monastery in which they have made profession. See *ibid.* With the promulgation of the 1983 Code, norms on transfer were reordered and simplified. In the post-conciliar period cases of transfer have increased, especially as the result of non-response to the call to renewal by some institutes, making some members opt for transfer (MCDONOUGH, "Separation of Members," 322).

¹⁴⁶ The doubt raised was as to whether the term "religious" referred to in c. 684 § 3 is to be understood only of religious in perpetual vows or also of religious in temporary vows. The interpretation given by the Commission was that the term "religious" referred to in c. 684 § 3 extends also to include those in temporary profession. See PONTIFICAL COMMISSION FOR THE AUTHENTIC INTERPRETATION OF THE CODE OF CANON LAW, authentic interpretation, June 20, 1987, in *AAS*, 79 (1987), 1249, in *CLD*, vol. 12, 380. See also J. TORRES, "Authentic Interpretation of Canons Regarding Consecrated Life: Commentary," in *Consecrated Life*, vol. 14, no. 2 (1989), 356.

¹⁴⁷ Jesus Torres remarks that many authors including himself, are not in agreement with the interpretation given by the Commission as it appears to overlook the weight of the value of the intention of the drafters of the original text. He argues that even though c. 684 § 3 forms part of the whole c. 684, it is an independent unit and should not create a doubt unless a reader wishes to understand it in relation of the rest of the canon. He explains that the text is not addressing the question of which religious may transfer as this is already clarified in the beginning of the canon which states: "[...] a religious in perpetual vows may transfer" (c. 684 § 1). He further clarifies that the perspective of c. 684 § 3 is quite different from the rest of the canon as it specifically addresses the conditions and requirements with regard to a religious who transfers to a monastery of the same institute, federation or confederation. This is different from the question of transfer between different religious institutes of which the rest of the canon treats (TORRES, "Authentic Interpretation of Canons," 356). He admits, however, the possibility of confusion which may arise from the phrase "[...] to another institute, federation or confederation" (c. 684 § 3). This is so because "[while] all the monasteries of the same order follow the same rule, [...] not all the monasteries that follow the same rule belong to the same order" (*ibid.*, 366). See also ABBASS, *The Consecrated Life*, 190-191 where the author also admits the difficulty in understanding the meaning of "confederation" in both the Latin and Eastern Codes. Abbass observes that while the latter defines the term "confederation" in connection with the procedure of its

By way of comparison, the Eastern legislation prescribes a different procedure of transfer from that of the Latin Church. The Eastern Code presents two types of transfer, that is, to another monastery *sui iuris* (CCEO, c. 487)¹⁴⁸ and to another religious institute (this includes monasteries, orders and congregations) treated in CCEO, cc. 544-545.¹⁴⁹ Moreover, the Eastern Code, unlike the Latin one, permits transfer of temporarily professed members and CCEO, c. 545 § 2 specifically provides for this situation.¹⁵⁰ It is the conviction of the author of this thesis that

erection by the competent ecclesiastical authority (CCEO, c. 439), the former gives no definition and only recognizes the competence of the Holy See to establish them (c. 582). Ombres concurs with Torres that c. 684 § 3 should be treated independently from the rest of the canon as it addresses a specific matter which is unrelated to other paragraphs. See OMBRES, "Separation from a Religious Institute by Transfer or Departure," in *Clergy Review*, 70 (1985), 414. See also J. BEYER, *Le droit de la vie consacrée*, Paris, Tardy, 1988, 180-181 where the author foresees another difficulty with c. 684 § 3, in view of the temporary nature of the profession of those in temporary vows. He considers the interpretation by the Pontifical Commission for the Authentic Interpretation of the Code of Canon Law as doubtful as it does not appear to solve the difficulty of the temporarily professed religious who need to renew their vows once they [vows] expire, while the norm indicates that such a transfer does not require a new profession.

¹⁴⁸ With regard to transfer to another monastery *sui iuris*, the Eastern Code presents three situations. First is transfer within the same confederation which requires a written consent of the president of the confederation, after consulting the superior of the monastery from which the transfer is made (c. 487 §§ 1, 3). Second is transfer outside the same confederation which requires consent of either eparchial bishop, patriarch or the Holy See to which the receiving monastery may be subject (c. 487 §§ 2- 3). Third is transfer to a monastery outside the same Church *sui iuris* which, for validity, must be approved by the Holy See (c. 487 § 4). Transfer to another monastery *sui iuris* of same or another confederation or to a non-confederated one requires no novitiate or a new profession unless the *typicon* of the receiving monastery prescribes it (c. 488 §§ 1-2). See J. ABBASS, "Institutes of Consecrated Life (cc. 410-472)," in G. NEDUNGATT (ed.), *A Guide to the Eastern Code: A Commentary on the Code of Canons of the Eastern Churches*, Kanonika 10, Rome, Pontifical Oriental Institute, 2002, 368. Cf. ABBASS, *The Consecrated Life*, 188-204; MCDERMOTT, "Two Approaches to Consecrated Life," 224-225.

¹⁴⁹ For transfer to another order, congregation or monastery *sui iuris*, CCEO prescribes four ways. First is transfer to another religious institute within the same patriarchal territory. To transfer, a member requires a written consent of the patriarch, the consent of both the superiors general or the superiors of the monastery *sui iuris* of the institute *a quo* and *ad quem*, who must have obtained prior consent of the council or *synaxis* (CCEO, c. 544 § 1). Second is transfer to another institute of eparchial right. This kind of transfer requires a written permission from the eparchial bishop of the place where the principal house is located and consent of the general superior of the institute or the superior of the monastery *sui iuris ad quem* (CCEO, c. 544 § 2). Third is what the Eastern Code refers to as other cases of transfers. These are transfers to or from institutes outside the patriarchal territories. Such transfers require the consent of the Holy See (CCEO, c. 544 § 3). Lastly is transfer to an institute which belongs to another Church *sui iuris*. For validity, such a transfer requires the consent of the Holy See (CCEO, c. 544 § 4). Transfers to another order, congregation or monastery *sui iuris* require a member to make the novitiate whose time, under special circumstances can be reduced to a minimum of six months by the superior general or the superior of the monastery *sui iuris* with the consent of the council (c. 545 § 1). See ABBASS, "Institutes of Consecrated Life," in NEDUNGATT (ed.), *A Guide to the Eastern Code*, 386-387. Cf. ABBASS, "Transfer to Another Religious Institute in the Latin and Eastern Catholic Churches," 125.

¹⁵⁰ See ABBASS, *The Consecrated Life*, 190 and 384.

for any consideration of the possibility of universal legislation on transfer of temporarily professed religious in the Latin Church, the provisions of *CCEO* on the same matter can be insightful. Using the remarks of Jobe Abbass, admittedly made on a different subject, to advocate for transfer of temporarily professed in the Latin Church, we resonate that, “[...] the omission of such a norm from the Latin Code does not preclude it from being part of the proper law of Latin religious institutes.”¹⁵¹

On the conclusion of temporary vows, universal law presents only two options, suitability or non-suitability of the member for the life of the institute. In the case of finding the person suitable and with his or her request, the member is admitted to further profession, and in instances of unsuitability, the member is definitively separated from the institute (c. 657 §1), either by means of mutual decision or by one or the other party.

Transfer, as Elizabeth McDonough explains, is the process which allows members of an institute of consecrated life who wish to retain their consecration to do so while being called to another expression of it.¹⁵² This is a situation whereby the existence of a vocation to religious life in the member is not in doubt but there is conviction that the institute where it is lived is not suitable. Causes of such unsuitability, as Francisco Ramos explains, may be due to certain health problems which may make one unable to carry out works of one institute but not of another. Also, the member may feel that the institute of origin does not fulfil his or her expectation of religious life or is more attracted to a different spirituality or charism.¹⁵³ Technically speaking, E.

¹⁵¹ ABBASS, *The Consecrated Life*, 203.

¹⁵² MCDONOUGH, “Transfer,” in *RfR*, 61 (2002), 102.

¹⁵³ F.J. RAMOS, “Article 1: Transfer to Another Institute (cc. 684-685),” in *Exegetical Comm*, vol. 2/2, 1835.

McDonough explains, the member is not making a new consecration of his or her person to God, but rather is merely transferring the juridic modality of that consecration to another ecclesiastical entity.¹⁵⁴ Sharon Holland further clarifies that the person remains the member of the original institute but the rights and obligations arising from such membership are suspended in favour of her modified juridical status, that is, temporary membership in the new institute whose way of life he or she is required to observe.¹⁵⁵

While the legislator excludes temporarily professed religious from transferring to another institute in the Latin Church, no reasons are provided for justification. Most commentators on the canons on transfer do not present the reasons, either. Some authors attempt to justify the rationale of excluding temporarily professed members from transfer on the basis of the possible difficulty with the organization of formation process.¹⁵⁶ Other authors simply suggest the other options of separation from the institute, such as exclusion from further profession or non admission to perpetual vows (c. 657 § 1) which are permissible to temporarily professed members.¹⁵⁷

Universal law limits the conclusion of formation during temporary vows to the options of admission or non-admission to profession (c. 657 § 1). However, experience confirms that the success of a formation process is not and should not be limited only to proof of suitability or non-suitability for permanent commitment in a certain institute. Sometimes the process may end

¹⁵⁴ See MCDONOUGH, "Transfer," 102.

¹⁵⁵ See S.L. HOLLAND, "Separation of Members from the Institute (cc. 684-704)," in *CLSA Comm2*, 854.

¹⁵⁶ Elizabeth McDonough justifies the norm in excluding the transfer of religious in temporary vows on the basis that, ordinarily, the six year long period specified by law for the duration of temporary vows (c. 655) and its obligatory conclusion at the elapse of the time (c. 657 § 1) may not allow the process of transfer to be initiated and concluded before the expiry of vows. See MCDONOUGH, "Separation of Members from the Institute (cc. 684-709)," 230.

¹⁵⁷ RAMOS, "Transfer to Another Institute," 1834.

up with a further vocational discernment whereby both the institute and the member discover that he or she has a vocation to religious life but not to the institute to which he or she is ascribed.

Given the realities of the present society marked with secularism and other anti-religious ideologies, the invisibility of consecrated life in some parts of the world, together with the quality of candidates to consecrated life (some of them lack solid Christian and religious background), there are chances that temporarily professed religious may find themselves in an institute whose life does not fulfil their expectations of religious life. The issue in most cases is not a question of uncertainty of the existence of a religious vocation in a person but the suitability of the spirituality and charism for him/her. In view of that, we advocate the option of transfer to be extended to those in temporary vows in the universal legislation. As to the argument that transfer for temporarily professed would conflict with the renewal of vows, such reasoning relates more to difficulty than to impossibility. Transfer requires three years for the process to be concluded and the total period of temporary vows is up to six years (c. 655), with a possible extension of additional three years as stipulated in c. 657 § 2. Universal law requires that after a minimum of three years and a maximum of six years (c. 655), the decision be made on the suitability of the member for final commitment. Presuming that transfer to another institute has been part of the vocational discernment during the period of temporary vows, the minimum three years and maximum six years of temporary vows is long enough for the process of formation to conclude. The possibility of the three year extension contemplated in c. 657 § 2 could be used in such transfer.¹⁵⁸ The manner of conclusion of the process of transfer may also

¹⁵⁸ A difficulty may arise concerning the length of time for the transfer to be initiated and concluded within the time frame of three years in view of the mandatory probation lasting at least three years (c. 684 § 2). The canon itself partly solves the problem in § 4 which allows the new institute to make modifications on the time and manner of probation, with the requirement of the prescribed minimal duration of three years. Also, the Eastern Code offers some useful insight in *CCEO*, c. 488 § 2, in which alternative means for the probationary period during transfer are contemplated. As Jobe Abbass explains, the probationary period can be applied with necessary adaptations including

include the option of definitive separation from the original institute which was suggested in the 1981 *Schema*, c. 67 § 3 if admission to profession in the institute of transfer is not permitted.¹⁵⁹

4.3.4.3. A Feminine Model of Formation

An aspect which may be treated as part of consideration in the ecclesial legal reform is the legislation on a feminine model of formation. The role and contribution of women in the mission of the Church has remained an ongoing discussion with a greater impetus in the recent times. The Church is more affirmative of the significance of women and their role in the Church. This is demonstrated by the conscious effort to include women in the pastoral and administrative structures of the Church and to eliminate any form of discrimination against them.¹⁶⁰ This calls for appropriate training and formation of women religious as was recognized by John Paul II when he appealed for “[...] a more solid formation, while helping consecrated women to understand better their own gifts [...].”¹⁶¹ He also stressed that “[...] in the field of theological, cultural and spiritual studies, much can be expected from the genius of women, not only in relation to specific aspects of feminine consecrated life, but also in understanding the faith in all its expressions.”¹⁶² In retrospect, Pope Francis in the most recent times has acknowledged the

changing it into novitiate. Furthermore, given the special circumstances of the member in the process of transfer, the competent superior, with the consent of the council, could further shorten the time of the novitiate to a minimum of six months. See ABBASS, *The Consecrated Life*, 392.

¹⁵⁹ See *Communicationes*, 13 (1981), 326.

¹⁶⁰ The principle of equality between men and women was strongly expressed during the revision of the Code. The desire of the Conciliar Fathers was to eliminate all discriminatory norms which might have existed in the Code under revision. See *Communicationes*, 2 (1970), 176-177. Cf. footnote no. 226 of Chapter One.

¹⁶¹ *VC*, no. 58, in *AAS*, 88 (1996), 430, in *L'Osservatore Romano*, April 3, 1996, supplement, 10.

¹⁶² *Ibid.*

need for more representation of women in affairs of the Church.¹⁶³

As the study has revealed, norms on post-novitiate formation were based on the principles of clerical formation. As Amadeo Cecini concurs, the understanding of religious consecration and principles of formation of lay religious is predominantly based on masculine positions and interpretations.¹⁶⁴ The ultimate goal of the formation process is to enable the one being formed to attain the full integration in who they are, whether man or woman, and the capacity to express the fully human aspect of a consecrated person, responding to God's call and contributing to the mission of the Church. As part of her ongoing concern, the Church needs to consider a formation model which takes into consideration the uniqueness of women religious and appropriate ways of preparing them for effective contribution as women for the mission of the Church.¹⁶⁵

¹⁶³ See FRANCIS, Message to the UISG Plenary Assembly "The Integration of Women in the Life of the Church," May 12, 2016, in *L'Osservatore Romano*, English ed., May 20, 2016, 7, whereby the Holy Father admits that the integration of women into the life of the Church has been very weak and he advocates for greater participation of women, including the decision-making positions, as women's perspectives are very important for both the elaboration and the carrying out of such decisions.

¹⁶⁴ See C. AMEDEO, "An Institution at the Service of Formation," in F. IMODA (ed.), *A Journey to Freedom: An Interdisciplinary Approach to Anthropology of Formation*, Leuven, Peeters, 2000, 438. See also FABER, "Formation and Commitment in the New Code," 57, where the author observes that while the numbers of female religious in the Church today is four times that of male religious, *Renovationis causam* "has been written from the stance of the male hierarchical Church."

¹⁶⁵ Joan Faber remarks that differing approaches to formation for men and women are necessary as both have different perspectives of life which largely influence their learning and integration as religious. By way of example, she mentions some aspects in which men and women are different in relation to formation. First, women value connectedness. Women relate, therefore, with the world around them from the perspective of connectedness while men understand the world in relation to legal systems and power structures. Second, for women, their proper identity is achieved through forming relationships and ability to handle attachments, while for men their identity comes through work, achievements and success. Third, for women power is equated with giving of care and all that foster relationships, while men's sense of power is centred more on assertiveness and success. See FABER, "Formation and Commitment in the New Code," 57.

Conclusion

The chapter endeavoured to identify the areas of discrepancy between the application of norms in the proper law of the Institute of the Blessed Virgin Mary and provisions of universal law on formation during the period of temporary vows. To this effect, it revealed various aspects of formation during the period of temporary vows which demonstrate laxity in the application of law and those which need to be included in the programme. The chapter has demonstrated that in order for the institute of the Blessed Virgin Mary and perhaps any other apostolic lay religious institute to fulfill the aims of formation during the period of temporary vows, greater attention to the application of norms on formation and periodic re-evaluation of aspects which may require updating are necessary. This is due to changes in the realities and needs of the Institute and of the Church and the circumstances of those in formation.

The chapter has pointed out that for a more beneficial programme of formation during the period of temporary vows, certain aspects of the life of the institute are to be included in its content and pedagogy. On the content of the programme, the aspect of temporal goods, prudence in use of means of communication, study of mariology, more in-depth cultural studies, a deeper understanding of the leadership structures in the institute and how they operate and familiarity with literature on contemporary theological thought and Vatican documents especially on consecrated life, merit attention. On the pedagogy of the programme, greater focus could be given to the significance of a formative community, the harmonization of the programme in terms of its coordination and the specification of the roles of those involved with the sister information, the kind of occupations to be undertaken by both the director and those in formation without prejudice to the primacy of formation and, the availability of a well-stocked library.

The chapter has also highlighted the significance of a deeper understanding of the

identity, the mission and the person of the temporarily professed as part of formation during the period of temporary vows. Post-novitiate formation is mainly to orientate members into quality of living the life of the institute and in apostolic effectiveness. This formation therefore is to help the members to have a clear understanding of the identity of the institute in all its facets. That is, its patrimony and its charism as they are translated into a specific mission in the ecclesial context and interpreted to respond to the needs of different circumstances, places and times. Sandra Schneiders concurs:

[...] religious life is a very serious adult project that involves, eventually, a personal life commitment and public ecclesial responsibility. Not only does the person need to have a fairly deep understanding of the obligations and responsibilities she proposes to assume but some realistic experience of living them to the extent that such experience is possible before profession. She needs to know, in theory and in practice, what resources are available for her for living this life and how to access them.¹⁶⁶

Finally, on the level of universal legislation, the chapter offered some suggestions on the possible revision of some canons connected to formation during the period of temporary vows. This is in view of opening other alternative channels of concluding the formation and discernment process of religious in temporary vows. It has also proposed consideration for legislation of a feminine model of formation which appropriately prepare women religious for their role in the life and mission of the Church.

¹⁶⁶ See SCHNEIDERS, *Selling All*, 6.

GENERAL CONCLUSIONS

In order that post-novitiate formation fulfills its end, the Church requires that individual institutes prescribe in their proper law norms which reflect the universal principles on formation and draw up a *ratio institutionis*, that is, a formation programme which is to be updated from time to time according to demands of necessity. Therefore, the present study has endeavoured to establish whether the interpretation and application of the Church's universal norms on formation during the period of temporary vows in the Institute of the Blessed Virgin Mary (Loreto Sisters) are in conformity with the provisions of the universal law. It has also attempted to find out the extent to which the *ratio* for this formation is appropriately updated to accommodate the new realities and needs of the sisters in formation in the Institute.

The study situates the topic of formation during the period of temporary vows in the context of the meaning, place and role of consecrated life in the Church, and specifically, in the perspective proper to religious institutes. It traces the development of legislation on formation of religious in the Church to the time of the promulgation of the 1917 Code, through Vatican II, to the promulgation of the 1983 Code and subsequent legislation. This approach allows for presenting a broader ecclesial and historical-canonical framework of the current legislation on formation of religious. Special attention was given to the analysis of norms on formation after the first profession and of other norms regulating the period of temporary vows, as promulgated in the 1983 Code of Canon Law. The study also analyzed the structure and principles of formation during temporary vows within the Institute of the Blessed Virgin Mary (Loreto Sisters) as specified in its proper law. By comparing and cross-analyzing the proper law, the dissertation has attempted to assess the fidelity of the Institute to the universal norms of the Church in its application of norms on formation during the period of temporary vows and to offer

some recommendations of how the proper law of the Institute could be best adapted to the present situation.

In the course of this study we were able to reach a number of conclusions. First, formation as a vital aspect of religious life is a reality which is as old as religious life itself. From the earliest forms of religious life, there were always some recognizable instances of specific formation process for new members. As the study revealed in Chapter One, the monastic orders required new members to undergo training in the Rule, and to submit to hard-testing to ascertain the firmness and authenticity of their intention. The training in these earliest orders emphasized austerity and ascetism associated with the monastic way of life.

Second, formation of religious has been shaped by the evolution of religious life itself, the changing needs and realities of the Church and of the world, and the development in the understanding of religious life by the Church. In the history of the Church prior to Vatican I, the recognized form of religious life was the cloistered form which excluded contact with the world. Such form of life only required new members to know the Rule and to imitate the way of life of the older members. Since religious women neither had contact with the outside world nor engaged in any apostolic activities outside the cloister, the Church presumed that in-house formation between the period of postulancy and novitiate was adequate in preparing religious women for religious life. Indeed, formation after temporary vows was foreseen only for candidates to sacred orders. Nevertheless, this understanding of formation of women religious had to change due to the changes in the social, economic and political realities, especially in the Western world. The newly created humanitarian needs necessitated the rise of “congregations”¹ which responded to these needs by means of apostolic actions. The activities of these

¹ See the commentary on constitution *Conditae a Christo* which gave official approval to women religious who professed simple vows, in section 1.3.1 of Chapter One of the study.

congregations, which included medical care, teaching, general care and other service, involved constant interaction with people. In order to carry out those actions members of the congregations required specific qualifications, skills and expertise. Therefore, the Church had to reconsider the principles and content of formation of women religious in order to enable them to respond effectively to the apostolic needs of the Church and of the world.

Third, prior to Vatican II, the lack of or inadequate professional training of women religious was apparent. In general, many possessed very little or no skills, nor academic qualifications to enable them to engage effectively in apostolic works which required professional competence. In response, Pope Pius XII called for professional training of women religious and concrete initiatives to achieve this goal.² The Church recognized thus the necessity of professional training of women religious as part of their formation.

Fourth, post-novitiate formation was an innovation introduced after Vatican II. It was at Vatican II that formation of lay religious after first profession was recognized as a significant and necessary aspect of religious life. Post-novitiate formation was not only to aim at professional competence of religious but also at enabling their personal and psychological development toward the necessary maturity for fruitful undertaking of religious life. In the context of renewal of religious life in general and of formation in particular, formation of lay religious after first vows was given special attention. The instruction *Renovationis causam* which offered temporary and experimental directives re-ordered the norms of the 1917 Code on formation, together with introduction of various innovations. The document outlined the principles of adaptability and renewal of formation based on the needs of the Church, the culture and maturity of the candidate, the circumstances of the world and the uniqueness of the institute. Consequently, some of the principles of this document found their place in the 1983 Code of

² See footnote no. 14 of Chapter One.

Canon Law.

Fifth, the 1983 Code reinforced the conciliar teaching by laying down that formation is an intrinsic aspect of religious life, a life-long process, and a right and obligation of every institute as well as of individual members. The Code outlined the dimensions of post-novitiate formation as spiritual and apostolic, doctrinal, and, at the same time, practical. It also gave formation a new pedagogical approach which emphasized gradual initiation into embracing a properly religious identity, configured to the capacity of an individual and mindful of the needs of the Church and the purpose of the institute. The Code identified the task of providing formation as a grave duty of every institute. Through its internal authority, each institute is to facilitate the formation of members by according them [members] time and resources for it, to draw up a *ratio* which clearly outlines the aims, content and pedagogy of every stage of formation and to ensure careful selection and training of formation personnel. The new Code further highlighted the significance of post-novitiate formation in deepening the formation already started in the novitiate, and preparing members for quality life in the institute and their apostolic effectiveness.

Sixth, it was seen that, besides its formative and probationary nature, the period during temporary vows does not modify the juridical status of a religious in terms of the rights and obligations deriving from their religious profession. The temporarily professed are incorporated into the institute with the rights and obligations and assume the life and participate in the works of the institute just like the other members (cf. c. 654). In view of this, the study points to the importance of uniformity in the application of universal legislation, especially of those laws which touch on the status of a person. Consequently, we have given suggestions for future revision of certain canons related to the period of temporary vows, the canons which in their

present form appear to be discriminatory.

Seventh, we can therefore conclude that the ultimate goal of formation is about integration of the person. In the case of formation during the period of temporary vows, this integration forms the yardstick for readiness and maturity for permanent commitment of a candidate. The period of temporary vows is a time and space in the life of a religious characterized by a series of activities which include training, participation in the apostolate and life of community, assessment and evaluation, ongoing discernment coupled with accountability and direct involvement with those in charge of formation. These activities, if not well coordinated and harmonized, can be overwhelming for the person in formation and may even be detrimental to the ultimate outcome of the formation process. Also, harmony of life seems to be uniquely important for the current generation as the present society tends to orientate the human person towards disintegration.³ Post-novitiate formation is to be integrated with other stages so that it is fitted into the overall formation structure of the institute as part of the whole. It must also take into account the whole person, so that his or her physical, mental, moral, and intellectual qualities develop in a harmonious way and that the apostolic, doctrinal and practical dimensions are fused together, leading to unity of life.

Eighth, it can rightly be said then that for a more beneficial formation programme, the process is to take into account the person of the temporarily professed. While remaining faithful to the institute's charism, the formative process should take into consideration the uniqueness of the person and the mystery of God inherent in each human being. The person being formed is an active subject of the formation process and his or her contribution to the process according to his

³ AUBRY, "Ongoing Formation," 77. The author remarks, "[...] in the present age more than ever before, life is characterized by tensions between 'conservative' and 'liberal,' across the 'the generation gap' between decentralization and unity, consecration and mission, human development and mission, between prayer and action, individual and community charism, obedience and authority" (ibid.).

or her capacity is crucial to the outcome of formation. The study points out that even the best structured formation programme, administered by the most trained and qualified personnel may not produce the desired results if the person being formed is not understood and appreciated. It is, therefore, of utmost importance that during the formation process the person in temporary profession is treated in the manner taking into account his or her personality disposition, cultural and generational context and unique personal circumstances. Formation of those in temporary vows is to be a personalized process which is configured to the capacity and needs of each person.

Ninth, the cross- analysis and comparison of the norms on formation during the period of temporary vows in the proper law of the Institute of the Blessed Virgin Mary, with those of universal law have confirmed conformity in the legislation. With regard to the practical application of these norms, however, the study has revealed that there are some aspects of the formation structure which require updating due to emergence of new realities and needs in the Institute and in the Church. This calls for re-evaluation of the formation programme so that while the essential elements prescribed by universal law remain intact, practical aspects can be modified to suit the needs of those in formation and to respond more fully to the needs of the Institute and the Church in the context of time, place and people.

Tenth, for post-novitiate formation to achieve its goals, individual institutes are to ensure that its primacy is upheld. The period during temporary vows is very critical in the life of a religious in terms of incorporation of the important features of religious identity, already introduced during novitiate, in the concrete community and apostolic experience. Transition from the structured and guided life of the novitiate to a more open and free manner of life in apostolic community engaged in a demanding apostolate may lead the temporarily professed to

spiritual aridity. Also, for the unity of life and the necessary maturity for the resolve for permanent commitment, a religious in temporary vows requires continuous discernment, accompaniment and guidance by those charged with the task of formation, and the experience of the life and mission of the institute. Formation of those in temporary vows, therefore, has to remain a priority. With the pressure of apostolates to be sustained, new needs to be responded to, coupled with the diminishing availability of personnel in many institutes, there is often the temptation on the part of superiors to assign members in temporary vows to very demanding apostolates. As the study has pointed out, the period during temporary vows is crucial for integration of apostolic experience with spiritual life, community life and mission, as well as reconciling individual needs with those of the institute. The primacy of post-novitiate formation, therefore, must not be compromised, however justifiable the motivations for assigning to other tasks might be.

Lastly, formation of religious in general remains a constant concern of the Church. In the post-conciliar period the Holy See has issued numerous documents on consecrated life in general and on formation in particular. These documents serve as a means of addressing specific issues facing formation in religious institutes. They have also deepened and broadened the scope of the norms on post-novitiate formation, putting emphasis on a pedagogy which is more person oriented, namely, aimed at advancing the maturation and integration of the individual's Christian, human, spiritual and psychological features. This ongoing concern about formation of religious may also require the Church, as the study points out, to consider the re-evaluation of some canons which touch on the status of the religious in temporary vows and the possibility of legislation of a distinctly feminine model of formation.

To sum up, we may conclude that formation is a grave responsibility that the Church has

placed on religious institutes and pertains to the very survival of religious life itself. Therefore, formation remains a primary responsibility of every institute and cannot be substituted by any other formative endeavours undertaken outside the institute. This responsibility requires individual institutes to invest in resources, time and personnel to the best of their ability. This is to ensure that members are formed and trained in accordance with the requirements of proper and universal law, and that formation fulfills its intended aims. In view of constantly changing realities, the formation programme of every institute is to be drawn up with consideration for its continuous renewal. As the mission of individual institutes continues to take on new dimensions, the needs of the Church and the world keep shifting focus, and the socio- cultural context of new generations entering religious life continues to present new challenges, formation needs always to remain a constant concern. In view of the specific socio-cultural context of those in formation, the context evolving from one generation to another, religious institutes are to ensure that there is continuous and appropriate adaptation of the *ratio*, updating of the skills of the formation personnel and availability of a conducive environment for members in formation. Only then will formation during the period of temporary vows prepare religious to live the life of their institute fully and fulfill its mission effectively, resonating with the words of Jesus when he stated: “And no one puts new wine into old wineskins, otherwise the new wine will burst the skins and it will be spilled out, and the skins will be ruined. No, new wine must be poured into fresh wineskins” (Lk 5:37-38).

APPENDIX

The formulation of the text of canons on formation of religious from the *1977 Schema*, through to the subsequent Schemas to their final form in the 1983 Code.¹

<i>Vita cons.</i> , 64	<i>1980 Schema Codicis</i> , 585	<i>1982 Schema Codicis</i> , 659	<i>1983 CIC</i> , 659
§1. In singulis Institutis, post primam <i>cooptationem</i>, sodalium instituto perficiatur ad vitam Instituti propriam plenius ducendam et ad eius missionem aptius proseguendam. §2. Quapropter, <i>Constitutiones</i> {definire debet <i>huiusmodi</i> institutionis <i>durationem</i> et rationem,} attentis Ecclesiae necessitatibus atque hominum temporumque conditionibus prout a fine et indole Instituti exigitur.	§1. In singulis Institutis, post primam professionem omnium sodalium institution perficiatur ad vitam Instituti propriam plenius ducendam et ad eius missionem aptius proseguendam. §2. Quapropter ius proprium {rationem definire debet huius institutionis eiusdemque durationis,} attentis Ecclesiae necessitatibus atque hominum temporumque conditionibus prout a fine et indole Instituti exigitur.	§1. In singulis institutis, post primam professionem omnium sodalium institutio perficiatur ad vitam instituti propriam plenius ducendam et ad eius missionem aptius proseguendam. §2. Quapropter ius proprium rationem definire debet huius institutionis eiusdemque durationis, attentis Ecclesiae necessitatibus atque hominum temporumque conditionibus, prout a fine et indole instituti exigitur.	§1. In singulis institutis, post primam professionem omnium sodalium institutio perfeciatur ad vitam instituti propriam plenius ducendam et ad eius missionem aptius proseguendam. §2. Quapropter ius proprium rationem definire debet huius institutionis eiusdemque durationis, attentis Ecclesiae neccessitatibus atque hominum temporumque condicionibus, prout a fine et indole instituti exigitur.

¹ E.N. Peters, *Incrementa in progressu 1983 Codicis iuris canonici*, Montréal, Wilson and Lafleur Limitée, 2005, 608-609.

<i>Vita cons., 65</i>	<i>1980 Schema Codicis, 586</i>	<i>1982 Schema Codicis, 660</i>	<i>1983 CIC, 660</i>
§1. Institutio, <i>sub ductu peritorum consequenda</i> atque capacitati sodalium accommodata, sit doctrinalis simul ac practica <i>iuxta exigentias Instituti</i>, titulis etiam congruentibus pro opportunitate obtentis. §2. Vide 1983 CIC 559.	§1. Institutio sit systematica, capacitati sodalium accommodata, spiritualis et apostolica, doctrinalis simul ac practica, titulis etiam congruentibus, tam ecclesiasticis quam civilibus, pro opportunitate obtentis. §2. Perdurante tempore huius institutionis sodalibus official et opera ne committantur quae eam impediunt.	§1. Institutio sit systematica, captui sodalium accommodata, spiritualis et apostolica, doctrinalis simul ac practica, titulis etiam congruentibus, tam ecclesiasticis quam civilibus, pro opportunitate obtentis. §2. Perdurante tempore huius institutionis sodalibus officia et opera ne committantur quae eam impediunt.	§1. Institutio sit systematica, captui sodalium accommodata, spiritualis et apostolica, doctrinalis simul ac practica, titulis etiam congruentibus, tam ecclesiasticis quam civilibus, pro opportunitate obtentis. §2. Perdurante tempore huius institutionis sodalibus officia et opera ne committantur, quae eam impediunt.

<i>Vita cons., 66</i>	<i>1980 Schema Codicis, 587</i>	<i>1982 Schema Codicis, 661</i>	<i>1983 CIC, 661</i>
Per totam vitam <i>sodales culturam</i> Spiritualem, doctrinalem et <i>technican</i> sedulo <i>prosequi intendant et Moderatores, pro posse</i>, {adiumenta et tempus ad hoc eis} procurent.	Per totam vitam religiosi formationem suam spiritualem, doctrinalem et practicam sedulo prosequantur et Superiores {eis adiumenta et tempus ad hoc procurent.}	Per totam vitam religiosi formationem suam spiritualem, doctrinalem et practicam sedulo prosequantur; Superiores autem eis adiumenta et tempus ad hoc procurent.	Per totam vitam religiosi formationem suam spiritualem, doctrinalem et practicam sedulo prosequantur; Superiores autem eis adiumenta et tempus ad hoc procurent.

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BIOGRAPHICAL NOTE

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In 2010, she was asked by the Province leader to undertake studies in Canon Law. She obtained two diplomas in philosophy and theology concurrently at the Catholic University of Eastern Africa the same year. Her studies in Canon Law commenced in 2011 and in 2013, she obtained a Licentiate in Canon Law from Urbaniana Pontifical University, Rome and a Masters in Canon Law from the Catholic University of Eastern Africa, Nairobi, Kenya. She began her doctoral studies in Canon Law at Saint Paul University, Ottawa, Canada, in the Fall of 2014.