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**AN HISTORICO-JURIDICAL CONSIDERATION OF THE JESUIT FOURTH VOW:
SPECIAL OBEDIENCE TO THE POPE WITH REGARD TO MISSIONS**

by
Michael J. DOIRON, S.J.

A dissertation submitted to the Faculty of Canon Law,
Saint Paul University, Ottawa, Canada, in partial
fulfillment of the requirements for the degree of
Doctor of Canon Law

Ottawa, Canada
Saint Paul University
1995



Michael J. Doiron, Ottawa, Canada, 1995



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ABSTRACT

This dissertation addresses the question: what is the matter of strict juridical obligation incurred by one who professes the fourth vow in the Society of Jesus. Only one "grade" or group of Jesuits profess the Society's "fourth vow" which promises "special obedience to the Sovereign Pontiff with regard to the missions." Since the investigation concerns a vow of obedience, Chapter One considers the emergence of the phenomenon of religious obedience as it was understood and developed through the customs, the rules and the "proper law" of various religious communities which grew in the Church. Thus the rules for the interpretation of a juridical text are observed, especially as they are cited in canons 16, 17 and 19.

Chapter Two probes the influences working in the life of the founder, Ignatius of Loyola, the birth of the *Spiritual Exercises* and the events and documents which led to the establishment of the Society of Jesus. Chapter Three examines *The Constitutions of the Society of Jesus*, especially those Parts which deal with the two vows of obedience. Specific attention is given to the manner in which the notion of "mission" was understood and carried out by the first Jesuits. Various general principles recognized by the Church which place some limitations on the juridical obligation incurred by one who professes a vow of obedience are also cited. In Chapter Four a review of the historical development of the juridical understanding of the fourth vow is undertaken and then reconsidered in the light of the renewed legal context brought about by the Second Vatican Council and the revision of the Code of Canon Law. The Chapter then looks to the future and suggests possible developments which may occur regarding the evolution and the application of the Jesuit fourth vow.

It is the primary conclusion of this study that the fourth vow is to be understood as follows: the vow highlights and focuses the essential missionary end of the Society; it legitimately amplifies the commitment of the third vow with a greater intensity and it extends that commitment with elements of obligation not strictly required by the third vow. The *Constitutions* specify the matter of juridical obligation over and above that which is legally required by the third vow: a professed Jesuit is not to seek (directly or indirectly) but to accept, immediately and without excuse, missions from the pope even to go to non-Christian countries without requesting provisions for the journey, nor causing a request for anything temporal to be made. It is also concluded that doctrinal matters are not part of the proper object of the fourth vow. The fourth vow, even though it is a special obedience to the pope, does not compromise the *ordinary, proper power* of the superior general over the institute which he governs. The source of the general's authority rests in the fact that he is the supreme moderator of an institute specifically defined and approved by the Church with mission at the heart of its essential nature and character, with mission as its special end or goal and with mission as its first principle and foundation. By analogy to canons 332 and 333 which deal with the pope's relationship with bishops, any personal papal mission can be understood to strengthen and safeguard not only the proper, ordinary and immediate power of the superior general, but also the essential nature of the Society itself.

DEDICATED TO
CONSTANCE MARIE DOIRON
(1919-1995)

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ABBREVIATIONS

| | |
|-------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>AAS</i> | <i>Acta Apostolicae Sedis</i> 1909— |
| <i>AG</i> | <i>Ad gentes</i> , Paul VI, 7 December 1965 |
| <i>AHSJ</i> | Archivum Historicum Societatis Iesu |
| <i>CD</i> | <i>Christus Dominus</i> , Vatican II, 28 October, 1965 |
| <i>CIC 17</i> | <i>Codex Iuris Canonici</i> , 1917 |
| <i>CIC 83</i> | <i>Codex Iuris Canonici</i> , 1983, references will be taken from the Code of Canon Law, The Latin Text and English translation, CLSA, Wash., 1983 |
| <i>CIS</i> | Centrum Ignatianum Spiritualitatis, Rome |
| <i>CLD</i> | <i>Canon Law Digest</i> , Vols. 1-11, 1934— |
| <i>CLSA</i> | Canon Law Society of America |
| <i>Cons.</i> | The Constitutions of the Society of Jesus in any edition |
| <i>ED</i> | Ecumenical Directory, Secretariat for Christian Unity, 14 May 1967 |
| <i>ES</i> | <i>Ecclesiae sanctae</i> , Paul VI, 6 August 1966 |
| <i>ET</i> | <i>Evangelica testificatio</i> , Paul VI, 29 June 1971 |
| <i>EppIgn</i> | <i>S. Ignatii Epistolae et Instructiones</i> , 12 volumes in MHSJ |
| <i>GS</i> | <i>Gaudium et spes</i> , Vatican II, 7 December 1965 |
| <i>IHSJ; IHSI</i> | Institutum Historicum Societatis Iesu |
| <i>ISJ</i> | Institute of Jesuit Sources, St. Louis, MO. |
| <i>LG</i> | <i>Lumen gentium</i> , Vatican II, 21 November 1964 |
| <i>MHSJ</i> | <i>Monumenta Historica Societatis Iesu</i> , the Historical Records or Sources of the Society of Jesus in critically edited texts. |

This scholarly series, which now contains over 145 volumes, was begun in Madrid in 1894. The project was transferred to Rome in 1929. Most of the manuscripts on which these volumes are based are in the Archives of the Society of Jesus in Rome. The series is being continued by its publisher, the *Institutum Historicum Societatis Iesu*, Via dei Penitenzieri 20, 00193, Rome.

MI *Monumenta Ignatiana*, the writings of St. Ignatius of Loyola

Series I.

EppIgn-S. Ignatii [...] Epistolae et Instructiones, [M. Lecina, V. Augusti, F. Cervós, D. Restrepo, eds.], 12 vols., Madrid, 1903-1911.

Series II.

SpExMHSJ-Exercitia Spiritualia S. Ignatii [...] et eorum Directoria, [A. Codina, ed.], 1 vol., Madrid, 1919. The critical text of the *Spiritual Exercises* and of the *Directories* for conducting them.

New Series II. A revision

SpExMHSJTe-Vol I. *Exercitia spiritualia: Textus*. A revision of *SpExMHSJ*.

DirSpEx-Vol. II. *Directoria Exercitiorum Spiritualium* (1540–1599). I. Iparraguirre, ed., 1 vol., Rome, 1955. This is a more complete edition of the *Directories* than the earlier one of 1919 in *SpExMHSJ*.

Series III.

ConsMHSJ — *Constitutiones et Regulae Societatis Iesu*. 4 vols. The critically edited texts of the *Constitutiones* and *Rules* of the Society of Jesus, along with copious introductions and notes.

ConsMHSJ, I-Vol I. *Monumenta Constitutionum praevia*, [A. Codina, ed.], Rome, 1934. Sources and records previous to the texts of the *Constitutions*. Historical introductions.

ConsMHSJ, II-Vol. II. *Textus hispanus*, [A. Codina, ed.], Rome, 1936. Critical texts of the four chief and successive texts of the Spanish original.

ConsMHSJ, III-Vol. III. *Textus latinus*, [A. Codina, ed.], Rome, 1938. The critical text of the Latin translation which was approved by the First General Congregation of the Society in 1558.

ConsMHSJ, IV-Vol. IV. *Regulae Societatis Iesu*, D. F. Zapico, ed., Rome, 1948. Ancient drafts of rules and directives.

Series IV.

SdeSI-Scripta de Sancto Ignatio, [L.M. Ortiz, V. Agusti, M. Lecina, A. Macía, A. Codina, D. Fernández, D. Restrepo, eds.], 2 vols., Madrid, 1904. Writings about St. Ignatius by his contemporaries.

Series IV., revised

FN-Fontes narrativi de S. Ignatio de Loyola et de Societatis Iesu initiss, D. Fernández Zapico, C. de Dalmases, P. Leturia, eds. 4 vols., Rome, 1943–1960.

Vol. I–1523–1556

Vol. II–1557–1574

Vol. III–1574–1599

Vol. IV–Ribadeneyra's *Vita Ignatii Loyolae* (1572).

Narrative sources, that is, writings about Ignatius by his contemporaries. An improved edition of the documents contained in *SdeSI*.

Fontes documentales de S. Ignatio

MONUMENTA MISSIONUM

1. *Missiones Orientales*, (Missions Eastward from Rome).

EppXav-Epistolae S. Francisci Xaverii [G. Schurhammer, J. Wicki, eds.], 2 vols., Rome, 1944-1945. An enlarged and improved edition of the *Monumenta Xaveriana* of 1899.

DocInd-Documenta Indica. [J. Wicki, ed.], 10 vols., Rome, 1948-1960.

2. *Missiones Occidentales*, (Missions Westward from Rome).

MonBras-Monumenta Brasiliae, S. Leite, ed., 4 vols., Rome, 1956-58. Documents pertaining to the first Jesuits in Brazil.

MonFlo-Monumenta Antiquae Floridae (1566-1572), F. Zubillaga, ed., 1 vol., Rome, 1946. Documents pertaining to the first Jesuits in Florida.

MonMex-Monumenta Mexicana, F. Zubillaga, ed., 3 vols., Rome, 1956-1968. Documents pertaining to establishments in Mexico, 1570-1585. Series pertaining to California, Canada, and Paraguay are in preparation.

MonNovFranc-Monumenta Novae Franciae, Vol. I, La première mission d'Acadie (1602-1616), L. Campeau, ed., Rome, 1967.

MonPeru-Monumenta Peruana, A. de Egaña, ed., 4 vols., Rome, 1954-1968. Documents pertaining to missions in Peru, 1565-1591.

| | |
|----------------|---------------------------------------------------------------------------------------------------------------------------------------------|
| <i>MonNad</i> | <i>Epistolae et Monumenta P. Hieronymi Nadal</i> , 6 volumes in <i>MHSJ</i> , of which volume V is his <i>Commentarii de Instituto S.J.</i> |
| <i>MR</i> | <i>Mutuae relationes</i> , Sacred Congregation for Bishops & Sacred Congregation for Religious and for Secular Institutes, 14 May 1978 |
| <i>NCatEnc</i> | <i>New Catholic Encyclopedia</i> |
| <i>PB</i> | <i>Pastor bonus</i> , John Paul II, 28 June, 1988 |
| <i>PC</i> | <i>Perfectae caritatis</i> , Vatican II, 28 October 1965 |
| <i>PG</i> | <i>Patrologia Graeca</i> , 161 vols., 1878-1890 |
| <i>PM</i> | <i>Pastorale munus</i> , Paul VI, 30 November 1963 |
| <i>RAM</i> | <i>Revue d'ascétique et de mystique</i> |
| <i>RC</i> | <i>Renovationis causam</i> , Sacred Congregation for Religious and for Secular Institutes, 6 January 1969 |
| <i>RfR</i> | <i>Review for Religious</i> , 1942— |
| <i>RR</i> | <i>Roman Replies and CLSA Advisory Opinions</i> , Wash., 1981— |
| <i>SC</i> | <i>Sacrosanctam concilium</i> , Vatican II, 4 December 1963 |
| <i>SSJ</i> | <i>Studies in the Spirituality of Jesuits</i> , St. Louis, 1969— |
| <i>WL</i> | <i>Woodstock Letters</i> |

INTRODUCTION

In 1965 the Society of Jesus began its Thirty-First General Congregation. At that Congregation one of the most spirited exchanges concerned the fact that only one “grade” or group of Jesuits profess the Society’s “fourth vow” which promises “special obedience to the Sovereign Pontiff with regard to the missions.”¹ While several proposals were discussed, including the abolition of grades, the Congregation felt that it should not act until experts studied the matter. The issue was deferred to the next General Congregation.

The Thirty-Second General Congregation began in 1974, and, as expected, the issue of the fourth vow figured prominently among the *postulata*. Fifty-four out of eighty-five Province Congregations had sent in official *postulata* on the matter.² There were a total of sixty-five official *postulata* regarding the issue of grades, forty-one asking for their abolition. There were those which stressed the fundamental character of the vow for the identity of the order and wanted it to be highlighted. Others, beginning with the same concern of its importance for the Society, wanted to see it extended to all its members, not just the professed. But what was most

¹ See T. SHANAHAN, *The Jesuit Vow of Obedience to the Pope: Universal Service in the Vineyard of Christ*, Fordham Univ., PhD Diss., 1975., pp. 64–68. He quotes L. LUKÁS: “De graduum diversitate inter sacerdotes Jesu,” *AHSJ*, 37 (1968), pp. 227–316. “[...] Ignatius allowed for the entrance of secular priests who, though having only minimal theological training, would be able to aid the Society by exercising their priestly ministry of saying Mass and hearing confessions. Then, six years after the initial papal approval of the Society, Ignatius sought permission to have two grades of priests. The papal bull *Exponi Nobis* of 5 June 1546 allowed for this diversity of grades. Since the initial reason for such a distinction was the dire need for more workers in Christ’s vineyard, Lukás is led to believe that the diversity of grades was merely temporary and was originally meant to pass out of existence. However, because of historical events in the later Society, principally the post-restoration Society’s looking back to Nadal’s strict interpretation of the qualifications for profession, the diversity of grades among priests continues in the contemporary Society” (id., p. 65, note 67). In recent years, this distinction of grades, especially between classes of priests in the Society, has carried an unfortunate residue. Those not called to the fourth vow are sometimes seen as not having the talent or educational ability necessary for the grade.

² J. PADBERG, *Together as a Companionship: A History of the Thirty-First, Thirty-Second, and Thirty-Third General Congregations of the Society of Jesus*, Saint Louis, IJS, 1994, p. 63.

disturbing was that the *postulata* demonstrated that among Jesuits there existed a broad range of understanding regarding the intention, the purpose and the extension of the vow. Surely one who professes a vow has a right, if not an obligation to know what it means. Thus, several *postulata* asked that the Congregation clarify the meaning and the scope of the fourth vow. In its proceedings the Congregation strongly expressed its desire simply to abolish grades in the Society. But in the midst of a remarkable and dramatic series of “missed signals” and strong statements Paul VI made it clear that for the universal good of the Church he did not want the Society to make any change at this time regarding the fourth vow. The Society, of course, complied and given the extraordinary circumstances surrounding the Congregation, it was felt that it would be inopportune to issue an authoritative declaration regarding the meaning of the vow.

Since the Thirty-First General Congregation called for examination of the matter several excellent studies have been written. By far, the best works are the historical investigations undertaken by John O’Malley. But to date very little has been produced on the issue from a canonical point of view.

This dissertation intends to address the question: what is the matter of strict juridical obligation incurred by one who professes the fourth vow in the Society of Jesus. The study will be shaped and influenced by several concerns. The Second Vatican Council, in *Perfectae caritatis*, pointed out that every institute in the Church has its particular spirit and function. The Council exhorted each institute to examine and understand its history and its roots and to “[...] reverence and embrace the genius and directives of its founder, its authentic traditions, the whole heritage, indeed, of the religious body.”³ This desire of the Council was expressed in canon 578 of the Code of Canon Law:

The intention of the founders and their determination concerning the nature, purpose, spirit and character of the institute which have been ratified by

³ *Perfectae caritatis*, 2b, in N. TANNER, ed., *Decrees of the Ecumenical Councils*, London, Sheed and Ward; and Wash., DC, Georgetown Univ. Press, 1990, p. 940.

competent ecclesiastical authority as well as its wholesome traditions, all of which constitute the patrimony of the institute itself, are to be observed faithfully by all.⁴

To fully appreciate the intention of the founders it is necessary to understand the influences and circumstances which led to the establishment of the institute. Thus, the method of this study will be historical from several points of view.

Since the investigation concerns a vow of obedience, Chapter One will consider the emergence and the development of the phenomenon of religious obedience in the Church. Practical uniformity was not seen on many points of religious law until the publication of the Code of Canon Law in 1917. Until then, various popes, bishops, councils and synods issued decrees and made law, but the history of profession and vows is to be found primarily in the customs and practices of the religious communities themselves. It will be necessary to look into the rules of various institutes to see the evolution of the concept of obedience.

The rule of a religious community is recognized by the Church as part of the "proper law" of the institute, and as such it is a juridical text. The universal law provides the following general principle for the interpretation of a juridical text:

Ecclesiastical laws are to be understood in accord with the proper meaning of the words considered in their text and context. If the meaning remains doubtful and obscure, recourse is to be taken to parallel passages, if such exist, to the purpose and the circumstances of the law, and to the mind of the legislator.⁵

An additional norm which will also be helpful concerns matters which have not been expressly provided for by universal law, proper law, nor by custom. In such cases one is to decide the question by considering "[...] laws passed in similar circumstances, the general principles of law

⁴ "Fundatorum mens atque proposita a competenti auctoritate ecclesiastica sancta circa naturam, finem, spiritum et indolem instituti, necnon eius sanæ traditiones, quæ omnia patrimonium eiusdem instituti constituunt, ab omnibus fideliter servanda sunt" (*CIC 83, c. 578*).

⁵ "Leges ecclesiasticæ intellegendæ sunt secundum propriam verborum significationem in textu et contextu consideratam; quæ si dubia et obscura manserit, ad locos parallelos, si qui sint, ad legis finem ac circumstantias et ad mentem legislatoris est recurrendum" (*CIC 83, c. 17*).

observed with canonical equity, the jurisprudence and praxis of the Roman Curia, and the common and constant opinion of learned persons.”⁶

Chapter Two will continue the historical study by probing the influences working in the life of Ignatius and the events which led to the establishment of the Society of Jesus. This will assist in understanding the intention of the founder, the mind of the legislator and the purpose and circumstances of the law of the institute. The latter part of this Chapter will give some scrutiny to the nature, purpose, spirit and character of the Society as expressed in its rule, or founding document: *The Formula of the Institute*.

The *Formula of the Institute* contains the following passage:

All who make the profession in this Society should understand at the time, and furthermore keep in mind as long as they live, that this entire Society and the individual members who make their profession in it are campaigning for God under faithful obedience to His Holiness Pope Paul III and his successors in the Roman Pontificate. The Gospel does indeed teach us, and we know from orthodox faith and firmly hold, that all of Christ’s faithful are subject to the Roman Pontiff as their head and as the Vicar of Christ. Yet for the sake of greater devotion in obedience to the Apostolic See, of greater abnegation of our own wills, and of surer direction from the Holy Spirit, we have judged it to be extremely profitable if each one of us and all who make the same profession in the future would, in addition to the ordinary bond of the three vows, be bound by a special vow to carry out, without subterfuge or excuse and at once (as far as in us lies), whatever the present and future Roman Pontiffs may order pertaining to the progress of souls and the propagation of the faith, and to go to whatsoever provinces they may choose to send us, whether they decide to send us among the Turks or any other infidels, even those who live in the regions called the Indies, or among any heretics or schismatics or any of the faithful.⁷

⁶ “Si certa de re desit expressum legis sive universalis sive particularis praescriptum aut consuetudo, causa, nisi sit poenalis, dirimenda est attentis legibus latis in similibus, generalibus iuris principiis cum aequitate canonica servatis, iurisprudencia et praxi Curiae Romanae, communi constantique doctorum sententia” (CIC 83, c. 19).

⁷ “Quicumque autem in hac Societate professionem emisierint, non solum in primis professionis suae foribus intelligant, sed quoad uixerint, memoris sint, Societatem hanc uniuersam et singulos qui in ea profitentur, sub Sanctissimi Domini Nostri Pauli Papae Tertii et aliorum Romanorum Pontificum successorum eius fideli obedientia, Deo militari. Et quanuis Euangelio doceamur, et fide orthodoxa cognoscamus ac firmiter teneamus, omnes Christifideles Romano Pontifici, tanquam capiti ac Iesu Christi Vicario, subesse: ob deuotionem tamen maiorem ad obedientiam Sedis Apostolicae, et maiorem voluntatum nostrarum abnegationem, et certiozem Sancti Spiritus directionem, summopere conducere iudicamus, singulos nos et quicumque eandem in posterum professionem emisierint, ultra illud commune trium uotorum uinculum, speciali ad hoc uoto astringi, ut quidquid modernus et alii Romani Pontifices pro tempore existentes iusserint ad profectum animarum et fidei propagationem pertinens, et ad quascunq; prouincias nos mittere uoluerint; sine

The wording of the vow formula is found in Part V of the *Constitutions*:

I further promise a special obedience to the Sovereign Pontiff in regard to the missions, according to the same apostolic letters and the *Constitutions*.⁸

Chapter Three will examine *The Constitutions of the Society of Jesus*. After a general introduction and overview of the document, those Parts will be analyzed which deal with the two vows of obedience. Specific attention will be given to the manner in which the notion of “mission,” was understood and carried out by the first companions. Consideration will be given also to various general principles which place some limitations on the juridical obligation incurred by one who professes a vow of obedience.

Chapter Four will then address the specific question from the canonical point of view. It will first summarize the historical development of the juridical understanding of the fourth vow, and attempt to balance the essential elements related to the issue: the intention of the founders; a proper interpretation of the universal law; the proper law of the Society; the long time praxis of both the Holy See and the Society on the matter; and the lived experience of Jesuits. The Chapter will then identify some problems raised by contemporary scholars and respond to them in the light of the renewed legal context brought about by the the Second Vatican Council and the revision of the Code of Canon Law. The final Part of Chapter Four will look to the future, and suggest possible developments which may occur regarding the evolution and the application of the Jesuit fourth vow.

ulla tergiversatione aut excusatione illico, quantum in nobis fuerit (siue nos ad Turcas siue ad quoscunque alios Infideles, etiam in partibus quas Indias vocant, siue ad quoscunque Haereticos, Scismaticos, seu etiam ad quosuis fideles mittendos censuerint) exequi teneamur” (IULIUM III, *Exposcit debitum*, 21 iul. 1550, in *ConsMHSJ*, 1, pp. 377-378; A. DE ALDAMA, trans., in *The Constitutions of the Society of Jesus: The Formula of the Institute, Notes for a Commentary*, I. ECHÁNZ, trans. of *Notas para un comentario a la Fórmula del Instituto de la Compañía de Jesús*, Rome, CIS, 1981, St. Louis, *IJS*, 1990, pp. 7 & 9).

⁸ “Insuper promitto specialem obedientiam Summo Pontifici circa missiones; prout in eisdem litteris apostolicis et Constitutionibus continetur” (in *ConsMHSJ*, 3, p. 168, trans. by G. GANSS, *The Constitutions of the Society of Jesus*, *IJS*, St. Louis, 1970, [527]).

CHAPTER ONE

THE DEVELOPMENT OF RELIGIOUS OBEDIENCE

This study begins with an historical survey of the development of the phenomenon of religious obedience as seen primarily through the contributions made by various communities and institutes which grew in the Church. This approach is necessary, not only because it lays the ground for a better understanding and examination of obedience as understood in the Society of Jesus (the Jesuits), and specifically of its fourth vow—obedience to the pope with regard to missions—but for two other reasons as well.

First, the coordination of universal ecclesiastical legislation which brought practical uniformity and juridical order to religious institutes occurred, on some points, for the first time with the publication of the 1917 Code of Canon Law. Prior to this, popes, bishops, councils and synods had issued decrees and regulations on various points of religious law as needs were perceived, but for the most part the history, especially regarding profession and vows, is found in the customs and practices of the various religious communities. It is there, in their rules, where one must look to see the evolution of the concept of obedience.

Second, the understanding of obedience emerged only gradually, and each stage of its development was affected by the environment in which it was practised. Through the centuries religious life has been a dynamic and vital element shaping both the Church and secular society, both a cause and an effect of social advancement. “[...] the founding of religious communities has frequently been a response to major developments in society, and the evolution of the Church and Western culture have been significantly influenced by the life and work of religious

communities.”¹ One helpful model, which lends some organizational assistance, divides this history into five main eras or ages, each with its “dominant image of religious life”: the Age of the Desert (200–500), the Age of Monasticism (500–1200), the Age of the Mendicant Orders (1200–1500), the Age of the Apostolic Orders (1500–1800) and the Age of the Teaching Congregations (1800–present).² As the ideal of religious life changes, the internal structures, including the practice of obedience, is modified to support new apostolic undertakings and new religious self-understanding.

A. Early Influences

1. Persecution, Martyrdom and Asceticism

Three elements which affected the emergence of what became religious life were the early persecution of the Christians, martyrdom and asceticism.

At first Christians were opposed by their Jewish brethren. Both the orthodox and the nationalists, who were made up largely of Sadducees at the time, did not accept Jesus as the Messiah and saw Christians as a threat to their own authority. Later the Romans, who hardly considered them to be good citizens, described them as “[...] a deplorable, unauthorized, and desperate faction, made up of credulous men and women and gathered from the very scum of humankind.”³ In the year 64 they were targeted by Nero as the arsonists of Rome. Then, in 250

¹ L. CADA, et al, *Shaping the Coming Age of Religious Life* (= CADA), Whitinsville, Mass., Affirmation Books, 1979, p. 11. Cf. also: M. A. DONOVAN, *Sisterhood as Power: The Past and Passion of Ecclesial Women*, New York, The Crossroads Pub. Co., 1989; D. O’MURCHU, *Religious Life: A Prophetic Vision*, Indiana, Ave Maria Press, 1991; and, P. WITTEBERG, *Creating a Future for Religious Life: A Sociological Perspective*, New York/Mahwah, Paulist Press, 1991.

² CADA, p. 13. See Appendix I. While the tables are very useful, there are, of course, limitations. Especially in Table 5, consideration could have been given to congregations dedicated to missionary work, nursing care and many different aspects of service to the poor. Developing structures, such as secular institutes, also seem to have been overlooked.

³ L. H. CANFIELD, *The Early Persecutions of the Christians*, Studies in History, Economics and Public Law, vol. 55, no. 2, New York, Columbia Univ., 1913, p. 22.

Minor editorial modifications, e.g., capitalization, spelling, inclusive language, have been made in this and other quotations to conform to the adopted style for this work.

the emperor Decius killed many who refused to participate in the general sacrificial rituals he demanded of all citizens. Valerian, his successor, focused his persecution on Church leaders. But it was Diocletian and his requirement that all should sacrifice to the Roman gods who caused the great blood-bath which continued until the peace of Constantine, established by an edict in 313 in the West, and in 324 in the East when he conquered his last rival.⁴

The first three centuries of persecutions in the Church were marked by those who were "obedient unto death" (Phil 2: 8), or "martyrs," a word which originally meant "witness," and these were esteemed as the "ideal" Christians. The veneration which developed around these latter-day apostles⁶ was so strong that it was believed that they could even forgive sins⁷ and would sit in judgement with Christ who would, upon their death, immediately receive them into heaven.⁸

The ardent tradition developing around the martyrs inevitably had its influence on the asceticism of the day. The early ascetics eventually adopted a life of daily or spiritual martyrdom instead of physical death. This fitted well with the spirit of renunciation, what Cassian called

⁴ For a discussion of this history, see H. MACDONALD, *The Juridical Implications of Canon 603*, (= MACDONALD), JCD Diss., Ottawa, Saint Paul Univ., 1990, p. 5 ff.

⁵ Cf. W. H. C. FREND, *Martyrdom and Persecution in the Early Church*, Oxford, Blackwell, 1965, pp. 87-90.

⁶ See W. A. CLEBSCH, *Christianity in European History*, New York, Oxford Univ. Press, 1979, p. 57. Cf. J. DANIELOU and H. MARROU, *The First Six Hundred Years*, The Christian Centuries, vol. 1, V. CRONIN, trans., London, Darton, Longman and Todd, 1964; H. DELEHAYE, *Les origines du culte des martyrs*, Subsidia hagiographica, vol. 20, 2nd ed. rev., Bruxelles, Société des Bollandistes, 1933, pp. 29-49.

⁷ See H. BETTENSON, ed. and trans., *The Early Christian Fathers: A Selection from the Writings of the Fathers from St. Clement of Rome to St. Athanasius*, London, Oxford Univ. Press, 1969, p. 155.

⁸ See M. VILLER, "Martyre et perfection," in *Revue d'ascétique et de mystique*, 6 (1925), p. 15. Later, when monastic life came to be equated with martyrdom, it was believed that monastic profession was equivalent to a second baptism. Cf. E. E. MALONE, "Martyrdom and Monastic Profession as a Second Baptism," in *Vom christlichen Mysterium*, A. MEYER, J. QUASTEN, and B. NEUNHEUSER, eds., Düsseldorf, Patmos-Verlag, 1951, pp. 115-134; J. E. SHERMAN, *The Nature of Martyrdom: A Dogmatic and Moral Analysis According to St. Thomas Aquinas*, Paterson, NJ, St. Antony Guild Press, 1942; and H. CHADWICK, *The Early Church*, (= *The Early Church*), The Pelican History of the Church, vol. 1, Harmondsworth, Eng., Penguin Books, 1967. For a well-documented summary on this topic, see MACDONALD, pp. 9-10.

apotage or *abrenuntiatio*,⁹ which was one of the principal motivations of those who eventually sought out the desert.

Spiritual martyrdom became the vocation of the monk, only when the ascetical life became a fixed vocation with the establishment of the monastic institute. Gradually the ascetic, and then the monk, came to fill the place that had been left vacant by the martyr.¹⁰

The asceticism practised by the early Christians was aimed at fostering the exclusive search for God. This was seen to be accomplished through a spirit of renunciation, i.e., overcoming self-will (*voluntates*) which was regarded as the driving force of the passions (*desideria, voluntates, adfectiones, or affectus*).¹¹ Elements of Greek asceticism can be seen, not only in the word asceticism itself,¹² but even in the very concept of the soul which was borrowed at least in part from Alexandrian hellenism.¹³

At least two other elements contributed to the particular expression of asceticism found among the early Christians. First, there was a clear expectation among the "saints" of the early Church that Christ's return was imminent. In the face of this impending *parousia*, virginity and mortification were not perceived as such a great hardship.¹⁴ Also, several eschatological and

⁹ CASSIAN, *De institutis coenobiorum*, L.IV. c. 34. L.XII. c. 32. Collectio III., 6. Cf. M. OLPHE-GALLIARD, "From the Fathers of the Desert to St. Basil and St. Benedict," in *Obedience*, [the English version of *L'Obéissance et la Religieuse d'Aujourd'hui*], (= OLPHE-GALLIARD), London, Blackfriars Pub., 1953, p. 22 ff.

¹⁰ E. E. MALONE, *The Monk and the Martyr; The Monk as the Successor of the Martyr*, The Catholic Univ. of America, Studies in Christian Antiquity, vol. 12, Wash., DC, Catholic Univ. of America Press, 1950, p. 1.

¹¹ See OLPHE-GALLIARD, referring to Cassian, Inst. IV. 34, 35. Col. IV, 899., p. 24.

¹² The word asceticism derives from the Greek verb *askeo*, and was originally applied to the discipline of athletes who prepared for the games. Cassian, in his Inst., V. 19. Xii. 32. Collatio IV. 6., refers to the monks as athletes, by reason of the warfare they conducted against their bodily passions. See also H. DRESSLER, *The Usage of "askeō" and its Cognates in Greek Documents to 100 A.D.*, Catholic Univ. of America Patristic Studies, vol. 78, Wash., DC, Catholic Univ. of America Press, 1947.

¹³ See OLPHE-GALLIARD, p. 24. "Among its features is the spacing of the eight major vices, mortal enemies of the monastic soul, in order to give them a hierarchy based on their greater or lesser harmfulness." Cf. C. H. MOORE, "Greek and Roman Ascetic Tendencies," in *Harvard Essays on Classical Subjects*, H. W. SMYTH, ed., Essay Index Reprint Series, Freeport, NY, Books for Libraries Press, 1968, pp. 99-140.

¹⁴ See J. O. HANNAY, *The Spirit and Origin of Christian Monasticism*, London, Methuen, 1903, p. 32.

Christological heresies praised virginity for one reason or another.¹⁵ The most influential of these groups was the second century Gnostics, who often believed that the flesh, and even the world, were inherently evil.¹⁶ While "Gnosticism was never a rigorously philosophical system of thought,"¹⁷ there is no doubt that together with the influence of Greek philosophy, it left its mark on the development and practice of early asceticism.

Solitude, silence, fasting, bodily mortifications, poverty, and especially virginity were tools used to overcome the flesh which, because of its original corruption, was the chief obstacle to the purity of heart necessary to the contemplation of God. While all Christians practised fasting, virginity was seen as "the act of asceticism *par excellence*, the necessary foundation to the earnest and disciplined life."¹⁸

While the ascetics at first lived at home or in the midst of the local Church, by the third century they had begun to move to the edge of the town. The end of the age of persecutions with the peace of Constantine and the increasing secularization this effected, together with the swelling of the Christian ranks with its inevitable dilution of values, precipitated some to follow the example of St. Antony, protect their solitude and move even further—into the desert.¹⁹

¹⁵ For example, the Marcionites, Montanists, Encratites, etc., held virginity in high regard.

¹⁶ See *The Early Church*, pp. 33–41. See also J. O. HANNAY, *op. cit.*, p. 32.

¹⁷ G. W. MACRAE, "Gnosticism," in *NCatEnc.*, W. McDONALD, ed., New York, McGraw-Hill Book Co., [1967], vol. 6, p. 528.

¹⁸ O. CHADWICK, ed., *Western Asceticism*, vol. 12, of The Library of Christian Classics, J. BAILLIE, et al., eds., London, SCM Press, 1958, p. 14; cf. MACDONALD for a good treatment of this topic, pp. 12 ff. It has been suggested that the virgins of the early Church mark the remote beginning of the cenobitic way of life. Attempts to establish the Essenians as the precursor of the monastic life have proved fruitless. See D. KNOWLES, *Christian Monasticism*, (= *Monasticism*), London, Weiden and Nicolson, 1969, p. 11; and N. KINSELLA, "The Origins and Development of Religious Life," (= KINSELLA), in *The Challenge of Religious Life Today*, C. O'GRADY, ed., London, Chapman, 1970, p. 2.

¹⁹ W. H. MACKEAN, *Christian Monasticism in Egypt to the Close of the Fourth Century*, (= MACKEAN), *Studies in Church History*, London, SPCK, 1920, p. 20. Cf. MACDONALD, pp. 19–23.

2. Scriptural Background

M. A. Corselis points out that one is hard pressed to find Scriptural sanctions for obedience which are as clear and direct as those for poverty and chastity. He has difficulty finding the connection between the “[...] fundamental inspiration of evangelical obedience and the actual choice of giving up by means of a fraternity the free disposal of one’s life.”²⁰ G. Constable, however, says the following:

All authority is from God, according to Paul in Romans 13: 1-2, and all existing authorities are instituted by Him, so that any resistance to authority is the same as resistance to God. This emphasis on the virtue and necessity of obedience, which is found especially in the writings of Paul, was only slightly modified by Peter’s insistence in Acts 5: 29 that, ‘We ought to obey God rather than men,’ since the interpretation of God’s wishes was entrusted to men. Two other important Biblical texts, both of which were cited in the chapter on obedience in the *Rule* of Bededict, are Luke 10: 16 and John 6: 38, where Jesus said that, ‘Whoever listens to you listens to Me; whoever rejects you rejects Me; and whoever rejects Me rejects the One Who sent Me,’ and that, ‘I have come down from heaven, not to do My own will, but the will of Him Who sent Me.’ These two texts express the doctrine of the delegation of authority and of obedience as submission to authority and following the example of Christ.²¹

With the always present possibility that the rule might be contested or confronted by a holy man in the community, it is not difficult to see why in the early days a clear doctrine of submission was conceived, with the superior defined as one who acted in the place of Christ.

D. Rousseau offers an excellent reflection on this issue, and places his consideration in the context of a theology of “nature” and “grace,” “sin” and “redemption.” He begins with Adam’s disobedience and leads then to the obedience of Christ Who came not to do His own will but the will of the One who sent Him (Jn 5: 30; Heb 10: 7, quoting Ps 39: 8-9), such that “Christ became obedient even to accepting death on a cross” (Phil 2: 8). This “way” of Jesus was set down for his disciples in the call of Christ, “Follow me” (Mt 4: 19), and later, “If

²⁰ M. A. CORSELIS, “The Apostolic Orders in the XIIth Century,” (= CORSELIS), Chapter II of OLPHÉ-GALLIARD, p. 38.

²¹ G. CONSTABLE, “The Authority of Superiors in Religious Communities,” (= CONSTABLE), Chapter III of, *Monks Hermits and Crusaders in Medieval Europe*, Variorum Reprints, London, 1988, p. 190.

anyone wants to be a follower of mine, let him renounce himself and take up his cross and follow me” (Mt. 16: 24). Jesus goes even further when He says: “If any man comes to me without hating his father, mother, wife, children, brothers, sisters, yes and his own life too, he cannot be my disciple” (Lk 14: 26). Rousseau points out that it is much less difficult to give up what one has than what one is, but that is the basis of religious obedience.

Religious obedience, then, is but Christian obedience in the wake of Christ’s own, carried to its conclusion, the free, voluntary and magnanimous act of one who desires to follow Christ wherever he goes, who hesitates not in the way and gives without reserve.²²

Thus, obedience evolved gradually, unlike virginity and poverty which were practised from the beginning, and in its religious life expression, “[...] is never given to a man, but to God always.”²³

B. The Age Of The Desert (ca. 200–500)

1. Antony

St. Athanasius in his *Vita Antonii*²⁴ provides the first documentation on Antony, an early Egyptian hermit. Antony’s life included severe fasting, long prayer, celibacy, poverty, manual labour, and solitude to the point where, for a period of time, he even shut himself up in a

²² O. ROUSSEAU, “The Vocation of Obedience,” (= ROUSSEAU), in OLPHIF-GALLIARD, p. 11.

²³ Ibid., p. 12.

²⁴ ATHANASIUS, *The Life of Saint Antony*, R. T. MEYER, trans., Ancient Christian Writers; the Works of the Fathers in Translation, J. QUASTEN and J. C. PLUMPE, eds., Westminster, MD, Newman Press, 1950. See also ATHANASIUS, *St. Antony the Hermit*, J. B. McLAUGHLIN, trans., New York, Benziger, 1924. From one of Antony’s disciples Jerome learned of Pöul of Thebes who during the Decian persecution became the first desert hermit. Athanasius does not mention a visit Antony was alleged to have made to Paul. See MACKEAN, pp. 657–668; and H. LEITZMANN, *The Era of the Church Fathers*, vol. 4, History of the Early Church, B. L. WOOLF, trans., London, Litterworth Press, 1951, p. 138. KINSELLA, p. 3, says: “The life of Antony was written by St. Athanasius and this proved to be one of the most influential ever in the history of Western Christianity.”

tomb.²⁵ In 305 he was sought out and imitated by some who wished to learn his way of life, and after his death in 356 he became known as the Father of Monasticism.

The obedience of these early hermits imitated the obedience of Jesus to the Father, what P. H. Durham calls unmediated obedience²⁶ in that their only master was God.²⁷ Once in the "desert," however, the neophytes wished to profit as much as possible from the experience of those more seasoned. At times one or another such "elder," as in the case of Antony, would be recognized as a master, and a small colony would form around him of those who wished to learn or even imitate his style of holiness.

However, confidence in some outstanding ascetic's experience in the spiritual life inclined many individuals to submit themselves to the direction of such a person. This submission was based less upon a juridically defined authority than upon a kind of spiritual paternity of a more or less charismatic nature. The subjection was freely undertaken, was revocable, was not confirmed by vow, nor did one subject himself for life.²⁸

In the context of the spirituality of the day, obedience was the first and most effective tool in the fight against a monk's own self-will and even his nature.²⁹ M. Olphé-Galliard comments: "These old and tried masters did not hesitate to declare that obedience was superior to every other ascetical exercise."³⁰ "For to surrender one's will in this manner is indeed in the highest

²⁵ See P. RILEY, *Manual Labour in Ancient Monastic Literature; The Semi-eremitical Phase*, [Ottawa], Univ. of Ottawa, [1953], pp. 172, 110-123.

²⁶ P. H. DURHAM, *Cenobitic Obedience*, Ottawa, Univ. of Ottawa, 1979, p. 9.

²⁷ See C. J. PEIFER, in his *Monastic Spirituality*, New York, Sheed and Ward, 1966, p. 274, adds that these early hermits were also obedient to the scriptures. See also D. KNOWLES, *From Pacomius to Ignatius: A Study in the Constitutional History of the Religious Orders*, (= *Fn Pachomius*), Oxford, Clarendon Press, 1966, p. 71.

²⁸ K. V. TRUHLAR, "Obedience," in *NCatEnc.*, vol. 6, p. 603.

²⁹ "Obedience is in the first place the corollary of the frank soul, and witness to the confidence the disciple has toward his 'father' or 'elder' to whom he comes requesting aid and advice" (Col. II, 11, cf. *Dictionnaire de spiritualité ascétique et mystique, doctrine et histoire*, [= *DdeS*], publié sous la direction de M. VILLER, assisté de F. CAVALLERA et J. DE GUIBERT, Paris, G. Beauchesne, 1937—, as quoted in OLPHÉ-GALLIARD, p. 25).

³⁰ *Ibid.*, p. 26.

degree to give oneself up; and it is an act of supreme liberty."³¹ The emphasis that came to be placed on obedience among these early ascetical groups was so strong that N. Kinsella remarks: "We could well re-examine the beginnings of religious life and see if we have not gone too far in making obedience the essence of religious life."³²

2. Pachomius

Around the same time that Antony was attracting followers,³³ a more important contribution was made to the development of this way of life, and especially to the practice of obedience. Pachomius, often called the Father of the Cenobitic Life, could also be named the Father of Monastic Rules, for he was the first to provide one for his followers. After seven years of discipleship under the spiritual master Abbot Palamon, Pachomius moved to Tabennisi where he founded a community of monks. It was here that monks first gathered together to live under a common rule.

What characterises especially the Pachomian rules, and gives them their great value when compared with preceding monastic institutions, is the principle of obedience on which they are based. Pachomius therein took a decisive step in the development of monasticism. Since then the very essence of the religious life has been obedience.³⁴

The rule was introduced to the West through a translation by St. Jerome,³⁵ and although this form of community lasted only about two hundred years, "it influenced a number of pre-

³¹ ROUSSEAU, p. 13.

³² See KINSELLA, p. 2.

³³ Antony died in 356; Pachomius died in 345.

³⁴ OLPHÉ-GALLIARD, p. 27.

³⁵ See A. BOON, *Pachomiana latina: règle et épîtres de S. Pachome, épître de S. Théodore et "liber" de S. Orsiesius*, (= BOON). Texte latin de S. Jérôme, Louvain, Bureaux de la revue, 1932; *Pachomian chronicles and rules*, (= *Pachomian Rules*), vol. 2 of *Pachomian koinonia*, Cistercian studies series, 46, A. VEILLEUX, trans., Kalamazoo, Mich., Cistercian Pub., 1981; and *Vita Sancti Pachomii*, "The Life of Saint Pachomius and His Disciples," vol. 1. of *Pachomian koinonia*, A. VEILLEUX, trans., Kalamazoo, Mich., Cistercian Pub., 1980.

Benedictine rules, as well as that of Benedict [...]."³⁶ Pachomius set the abbot in the place of Christ, required the monks to obey the superior as they would obey Christ, without "murmuring"³⁷ and without question, and he established a graduated penal code for disobedience.³⁸

There has been discussion regarding the nature of the commitment made by the monks of Pachomius. The section of his rule which deals with the reception of worthy candidates mentions that at the time of prayer the candidate is to be brought before the assembled community and change his garments for the monastic habit.³⁹ Since there is no mention of even a verbal pledge, and certainly no formal profession, this is cited as the first instance of what became known as tacit profession.⁴⁰

³⁶ MACDONALD, p. 34.

³⁷ "The obedience which the rule of Pachomius prescribes is impregnated with the notion of complete deference to superiors, whoever they are, and tolerates no neglect of their commands or disregard for their office. It requires that each in renouncing his own will, should undertake to observe in the presence of God and therefore in conscience all that is laid down by authority. The disciplinary code emphasises for each command the rigour with which it is to be observed, with the punishment graduated according to the fault. 'Murmuring' is there regarded as so unusual an offence that at the fifth relapse the delinquent is sent to the infirmary to be placed under the regulations for the sick. But such severity is not excessive; if the murmurer's complaint is well-founded, or if the superior is proved to be in the wrong, he himself undergoes the penalty" (OLPHÉ-GALLIARD, pp. 27-28). See *Pachomian Rules*, no. 5, pp. 176-177.

³⁸ See BOON, "Precepta Atque iudicia," p. 63 ff., and "Precepts and Judgements," in *Pachomian Chronicles and Rules*, p. 175 ff.

³⁹ "The Rules of Saint Pachomius," in *Pachomian Rules*, no. 49, pp. 152-153.

⁴⁰ W. N. FREY, *The Act of Religious Profession: A Brief Historical Synopsis and Commentary*, (= FREY), DCL. Diss., Wash. DC, Catholic Univ., 1931, pp. 24 ff., gives a good and well documented history of the notion of "tacit profession." He describes three ways where tacit or "presumed" profession were seen to take place. An aspirant could wear the community's habit for a period of one year; where there was a distinction of habits, it would be necessary to wear the habit of the professed for three years; or profession could become effective when the aspirant performed some act reserved to one already professed. For the act to be considered valid it required the consent of a competent superior, and the knowledge and positive intention of the aspirant, free from coercion and fear. It is clear that "profession" is here used to signify the act of entrance and acceptance into a religious community.

3. Schenute

In the monastery of Atripe, known for its strictness, problems with insubordination moved Schenute, its second superior, to be the first to require a commitment in writing.⁴¹ W. Frey points out that, "The renunciation of property demanded by Schenute had to be drawn up in writing so that a written evidence to the fact would be at hand should any trouble later on arise in questions of inheritance."⁴² The candidates were also the first to be required to make a verbal promise according to a prescribed formula.⁴³ D. Leclercq, who examined the text, suggested that the pledge was "[...] probably binding either for the duration of a man's monastic state or of his residence in that particular monastery."⁴⁴

4. Basil

St. Basil is considered to be the Father of Eastern Monasticism, "[...] more truly, even, than St. Benedict is of Western monastic life."⁴⁵ He founded a community in Asia Minor, which stood in contrast to the Pachomian structure in several ways. Basil's organization was less military and more familial, in that he wanted his community small enough that the superior would be personally acquainted with each member, impossible in the very large Pachomian settings.

⁴¹ OLPHÉ-GALLIARD, pp. 28 and 31.

⁴² FREY, p. 15. It is interesting to note that the first written commitment required by a religious arose as the result of a dispute over property.

⁴³ "I vow before God in His holy place, as the word of my mouth is witness: I shall not sully my body in any way; I shall not steal; I shall not take false oaths; I shall not lie; I shall not do evil secretly. If I transgress what I have sworn, I shall not enter the kingdom of heaven, for I know that God, before Whom I pronounce the formula of this pledge will thrust me, body and soul, into hell fire, for I have transgressed the formula of the pledge which I have pronounced" (FREY, note 2, p. 15.).

⁴⁴ OLPHÉ-GALLIARD, p. 31. See also P. LADEUZE, *Etude sur le Cénobitisme Pachomien pendant le IV^e siècle et la premier moitié du V^e siècle*, Louvain, J. Van Linghout, 1898, especially p. 314.

⁴⁵ *Fm Pachomius*, p. 4.

Basil's first concern was for the interior formation of the members of what might be called "homes of charity,"⁴⁶ and to this end his rules⁴⁷ even provide for the right of the superior to ask for the manifestation of conscience of the monk. Obedience was more important than "the great asceticism," and it was of such importance that he says:

[...] the monk who rejects the directives of his superior contradicts himself. If he does not intend to submit, if he wishes to do his own will, why has he placed himself under the obedience to a superior, or given him the privilege of guiding his life for him? After he has consented once and for all to living as part of the brotherhood, granted he is accounted a vessel capable of serving it, even if he thinks the order goes beyond his strength, he should submit himself to the judgement of the one who commands him, thus beyond what he can do, and show himself docile even to the point of death—in memory of the Lord who made himself obedient even to death, death on a cross.⁴⁸

The obedience desired by Basil was at once absolute and demanding, but moderated by familial bonds, perhaps what could be called the beginning of a commitment to the common life.

While there may be a discussion regarding the nature of the bond or commitment made by the followers of Pachomius, there is strong evidence to support the view that Basil required of his monks a commitment inspired by the baptismal pledges, and made before God. In his *Little Asceticon*⁴⁹ he provides no clear rite of investiture, "[...] but prescribes a promise of virginity, which he calls *professio virginitatis, propositum* and *pactum*."⁵⁰ Though there is no mention of

⁴⁶ Ibid.

⁴⁷ Basil did not write a Rule as such, but his two works, *Little asceticon* and *Great asceticon*, are referred to as his shorter and longer rules. St. Benedict and others often quote Basil's responses to questions etc. and refer to them as a Rule. See *ibid.*, p. 4.

⁴⁸ "En somme celui qui n'accepte pas la médication que lui offre le supérieur se contredit aussi lui-même, car s'il ne veut pas en recevoir de directives et persiste dans sa volonté propre, pourquoi reste-t-il avec lui? Pourquoi le conserve-t-il comme règle de sa vie?"

"Si quelqu'un a accepté d'être incorporé dans la communauté, une fois jugé vase capable de servir, même s'il croit que l'ordre dépasse ses forces, il doit s'en remettre au jugement de celui qui lui commande ainsi au-delà de ce qu'il peut, et se montrer docile et obéissant jusqu'à la mort en souvenir du Seigneur, «qui s'est fait obéissant jusqu'à la mort, et la mort de la croix»" (L. LEBE, trans., *Saint Basile: les règles monastiques*, [Maredsous], Editions de Maredsous, 1969, pp. 106-107).

⁴⁹ See *reg.* 11.

⁵⁰ St. BENEDICT, *RB 1980: The Rule of St. Benedict in Latin and English with Notes*, (= *RB 1980*), T. FRY, ed., Collegeville, Minn., Liturgical Press, [1981], p. 450.

a written promise, it does involve a perpetual commitment made in freedom by an adult and its violation is considered to be an offense against God. In the *Great Asceticon*⁵¹ he adds that “officials of the Church,” which would include superiors, are to be invited to witness the public “profession” or “consecration of the body.” This *propositum* contains most of the necessary elements of what is now understood as a vow, even though it must be remembered that, “in the early Church, the concept of vow was not yet clearly delineated and the terminology was still indeterminate.”⁵²

5. Eusebius

Another community that deserves brief mention in this treatment is that of Eusebius, the bishop of Vercelli (d. 371). His innovation was to have his clerics live in the cathedral under monastic rule. This was the inauguration of a practice whereby monks become priests by ordinary rule, a form of community life later followed by Augustine who first saw the practice in Rome.⁵³

6. John Cassian

John Cassian (ca. 360–435), with a companion, Germanus, visited most of the primary centers of Eastern desert spirituality before coming under the influence of John Chrysostom. When Chrysostom was deposed in the midst of the Origenist controversy, Cassian was one of those asked to carry his cause to Rome, where he arrived in 404 or 405, and it was probably there that he was ordained a priest.

⁵¹ See *reg. fus.* 14–15; *epist.* 199, canon 18; 217, canon 60; 46. See also *RB 1980*, pp. 450–51.

⁵² *RB 1980*, p. 452. See also OLPHÉ-GALLIARD, p. 32. Later, when vows become more juridically formal, it will become more difficult to leave the community, unless for a transfer to a community of stricter observance.

⁵³ See MACDONALD, p. 42–43; also, E. C. BUTLER, “Monasticism,” in *The Christian Empire and the Foundation of the Teutonic Kingdoms*, vol. 1, *The Cambridge Medieval History*, H. M. Gwatkin and J. P. Whitney, London, Cambridge Univ. Press, 1936, p. 562.

Cassian founded two monasteries in 415, one for men and one for women, with the desire to bring to Europe the structures he had encountered during his travels in the East. At this time, while monasteries existed, there was no comprehensive rule or organization in place to govern or manage the style of living.

Cassian wrote three works, two of which, the *Institutes* and the *Conferences*,⁵⁴ influenced virtually all subsequent monastic rules in the West. His contribution is to have compiled “the first *summa* of spiritual theology in the West” in formulations which with few variations, remain current “along the course of the history of Christian spirituality down to contemporary times.”⁵⁵

For Cassian, humility is the mother of all virtues,⁵⁶ where,

The prayer of petition and thanksgiving are the concrete expressions of the fundamental humility required of the monk in his relationship with God. Obedience and fraternal charity are the manifestation of this same humility in his relationship with others.⁵⁷

While Cassian upholds the centrality of obedience to superiors who are to be regarded as God’s representatives,⁵⁸ it is the interior life of the monk which is the focus and which gives meaning to the external practices.

⁵⁴ See *The Works of John Cassian*, C. S. GIBSON, trans., vol. 11, *A Select Library of Nicene and Post Nicene Fathers of the Christian Church*, Second Series, H. WACE and P. SCHAFF, eds., Oxford, Parker, 1894, pp. 201–290. See also the *Conferences*, *The Classics of Western Spirituality*, C. LUIBHEID, trans. and preface, O. CHADWICK, intro., New York, Paulist Press, 1985.

⁵⁵ F. CHIOVARO, “Cassian, John,” in *NCatEnc.*, vol. 3, p. 183.

⁵⁶ *Col.* 19, 2 P. 535 PL., 1128, as found in *DdeS*, col. 244.

⁵⁷ “La prière de demande l’action de grâces sont l’expression concrète de l’humilité foncière qui s’impose au moine dans ses rapports avec Dieu. L’obéissance et la charité fraternelle sont la manifestation de cette même humilité par rapport aux hommes. *Instit.* 12, 15 P. 215 PL. 450; *ibid.*, 18, P. 219 PL. 454; *Col.* 9, 13–14 P. 262 PL. 785” (*DdeS*, col. 244).

⁵⁸ See *ibid.*, Book IV, Chapter X of *Institutions*, pp. 221–222; Chapter XXIII–XXX, pp. 222–229.

C. The Rise Of The Age Of Monasticism (ca. 500–1200)

1. Augustine

Augustine is responsible for several major contributions to the understanding and practice of religious life. A monk when he was ordained, he established a “monastery of clerics” in his episcopal house after he was made bishop of Hippo.⁵⁹ This marked the “passage from a lay monasticism of a contemplative kind to a community of clerics living a monastic life wholly dedicated to the apostolate.”⁶⁰ While several local councils and other writings had addressed the view that a community of contemplatives was accountable to the bishop, Augustine wrote:

If Mother Church asks any service of you, you must neither accept it out of ambition nor fail to carry it out because inactivity appeals to you more [...] Do not prefer a carefree life to the needs of the Church.⁶¹

In his mind the needs of the Church took precedence over even the contemplative life, a notion contained in one of his mottos: “work and pray.”⁶² It is clear that his apostolic experience as a bishop and pastor of souls motivated him to attempt to harmonize the traditional ideals of monasticism with active apostolic service to the Church, a concern which has yet to find a happy balance in many religious institutes.

The basis of monastic life for Augustine was not obedience but Christian love.⁶³ Unlike Basil or Cassian (who shall be treated presently), Augustine justified obedience, not as a way to humility, nor as a means of overcoming self-will, but as an indispensable requirement of peace

⁵⁹ “*monasterium clericorum*,” in A. ZUMKELLER, *Augustine's Rule: A Commentary*, (= *Augustine's Rule*), M. J. O'CONNELL, trans., J. E. ROTELLE, ed., Villanova, PA, Augustinian Press, 1987, pp. 9–10.

⁶⁰ Ibid.

⁶¹ Letter 48, 2, in *Augustine's Rule*, p. 10. It is probably this passage which inspired Ignatius of Loyola to frame a “simple vow of the solemnly professed” of the Society, not to ambition; see Appendix II.

⁶² *Ora et labora*, from *The Work of Monks (De opere monachorum)*, written around the year 400.

⁶³ See A. ZUMKELLER, *Augustine's Ideal of the Religious Life*, E. COLLEGE, trans., New York, Fordham Univ. Press, 1986, especially “Obedience,” pp. 159–171; and by the same author, *Augustine's Rule*, *op. cit.*, p. 10.

in every kind of human society.⁶⁴ While Augustine could say: “Nothing is of such profit to the soul as obedience,”⁶⁵ the monk’s obligation of obedience grew out of a commitment to and a duty towards the community. Where Basil might have used the image of a master and a slave, Augustine began his remarks on obedience with the oft quoted sentence, “A superior should be obeyed as a father.”⁶⁶ This, however, did not denote a weakness in his attitude towards obedience when one understands that a superior became the father because he had been given the office—an office that comprised the power (*potestas*) and the authority to rule (*auctoritas regendi*).⁶⁷

It is Augustine’s merit to have transformed the rigid command-obedience pattern followed in Eastern monasteries into a more human and personal superior-subject relationship that is based entirely on mutual trust and Christian love.⁶⁸

Nonetheless, the superior had the authority of God to whom he had to give an account, and subjects were to obey except when “superiors command what is against the law of God.”⁶⁹

The spirit which dominated the attitude of the superior is found in a sermon Augustine made on the office of bishop where he considers that as superiors, “[...] we should not rejoice that we have authority over you but rather that we are of service to you.”⁷⁰ Thus a superior was

⁶⁴ See *The City of God*, abridged version, E. GILSON, forward, G. G. WALSH et al., trans., Garden City, NY, Image Books, Doubleday & Co., 1958, Bk. XIX, Chapter 13, p. 456 f.

⁶⁵ *Exposition on Psalm 70*, 2.1, see *Augustine’s Ideal of the religious life*, op. cit., p. 160.

⁶⁶ Rule 7.1.

⁶⁷ He is the “superior” (*praepositus*), who is “[...] first among you [...]” (*qui [...] praeest*), and who “[...] occupies a higher place among you [...]” (*qui ... loco superiore versatur*) Rule 7.1,3,4; 5.3; 6.3. See op. cit. p. 161.

⁶⁸ *Augustine’s Rule*, p. 114.

⁶⁹ *Exposition on Psalm 70*, 1.2; and *Letter 208* 5. See *ibid*.

⁷⁰ “[...] *non tam praeesse quam prodesse*,” Sermon 340, 1; see *Augustine’s Rule*, p. 115.

to strive not to be feared but to be loved in relationships based less on reverent respect than on trust.⁷¹

2. Caesarius

A. Malnory, in his work, *Saint Césaire: Evêque d'Arles*, cites several contributions made by Caesarius (502–542). While there is no evidence of a formal written profession, there is a requirement that the monk legally renounce any worldly material goods. There is also an obligation of stability, and a stress on the common life that almost swallows individualism.

While nothing directly refers to obedience, an important moderation is built into the rules for women. A superior has two assistants, one the director of the school, the other a novice-mistress. Before any important decisions are made, the superior is to consult elders whose very presence moderates the authoritarianism present in many Egyptian communities, and thus render decisions more charitable.⁷²

3. Benedict

D. Knowles says that “The first fixed point in the constitutional history of western monasticism is the *Rule of St. Benedict of Nursia*, written ca. 535–45.”⁷³ Even though the *Rule's* authorship has been contested,⁷⁴ there is no doubt that, until Ignatius of Loyola, this brief document has been of more influence in the development of religious law than any other.

⁷¹ Ibid.

⁷² See A. MALNORY, *Saint Césaire: Evêque d'Arles*, Paris, E. BOUILLON, 1894, pp. 252–256, 260 ff., 268–273. See also OLFHÉ-GALLIARD, pp. 32–33.

⁷³ *From Pachomius*, p. 6. See also *Monasticism*, pp. 33 ff., for a good historical summary and appraisal of the influence of St. Benedict.

⁷⁴ There is at least a very strong dependence on previous rules, especially the anonymous “*Rule of the Master*,” generally regarded to have been written in central Italy c.530. Cf. *ibid.*, p. 245, note 11. Cf. also, *Regula Magistri: The Rule of the Master*, L. EBERLE, trans., (from the Latin); A. DE VOGÜÉ, intro., C. PHILIPPI, trans., [Kalamazoo, Mich.], Cistercian Pub., 1977.

Although it concerns itself with the domestic government of the monastery where Benedict was abbot, more far-reaching effects include: the fixing of vows as part of religious life;⁷⁵ the beginning of the transition from the abbot as an absolute ruler to the abbot as subordinate to the rule; and the development of structures, such as *stability*, which helped the emergence of the *common life* as an inseparable element of cenobitic obedience.⁷⁶ It is not surprising that many of the particulars of Benedict's *Rule* eventually became part of canon law.⁷⁷ The *Rule* provides for a structure with:

[...] the monarchical abbot, elected for life by his monks, and himself appointing his officials; the general gathering of all the brethren to council on all matters of grave common interest, and the smaller council of seniors to advise the abbot on matters of lesser importance; and the vow of stability binding the monk to life-long residence in the monastery of his profession.⁷⁸

The act of commitment of a monk to live out the rest of his life in *this* community under the authority of *this* abbot, along with the introduction of mutual obedience, i.e., of the monks to each other as brothers,⁷⁹ help render obedience more humane and more internal.

Benedict's "Procedure for Receiving Brothers" reads:

When he is to be received, he comes before the whole community in the oratory and promises stability, fidelity to monastic life, and obedience. This is

⁷⁵ More will be said regarding whether the commitment required by Benedict should properly be called vows. It is still significant to see the preparation of the candidate leading up to the *profession*, the form of the commitment, and the effects.

⁷⁶ See CONSTABLE, in his note 17 refers to H. VAN ZELLER, *The Holy Rule*, London, 1959, pp. 82-89, "[...] who stressed that Benedict 'clearly has in mind obedience to a person, as distinct from obedience to the written rule.'" He also says on p. 191, "This act of profession was not a vow, which was unknown in monastic usage, except perhaps in Spain, before the eighth century, but it was a personal commitment to the monastic life, binding the monk to unlimited obedience to the abbot." While this is true, Constable seems to overlook the practical effects of "mutual obedience" and the fact that the monk does vow obedience according to the rule.

⁷⁷ *Ibid.*, p. 6.

⁷⁸ *Fm Pachomius*, p. 6. It is striking to see that with appropriate adaptations Ignatius incorporated all of the above (with the exception of the vow of stability) into his own organizational structure.

⁷⁹ See *RB 1980*, Chapter 71, p. 293. This Chapter suggests a hierarchy of obedience. The orders of the abbot or priors take precedence, younger monks obey older, especially those referred to in Chapter 46 and elsewhere as "spiritual elders" or "*spiritualibus senioribus*."

done in the presence of God and his saints to impress on the novice that if he ever acts otherwise, he will surely be condemned by the one he mocks.⁸⁰

T. Fry points out the distinction that a *vow* is made to God, and that here in the *Rule* it is really an *oath* that is prescribed since it is made "in the presence of God," and not *to* God but to another person, i.e., the abbot.⁸¹ It will not be until the Middle Ages that such questions are truly entertained,⁸² but Fry suggests that the consequences of the *promissio* scarcely differ from those of a *vow*: the abbot is in the place of Christ so a promise made to him is in effect a promise made to Christ; this section of the *Rule* is very influenced by the *Rule of the Master* where the commitment is clearly a *vow*; the promise, or written *petitio*, is made publicly before the entire community and before the altar which represents Christ; the monk places the *petitio* on the altar during the liturgical rite of profession, and it is later removed from the altar by the abbot.⁸³

For the purposes of this study it is more important to recognize several key refinements contributed by Benedict. In his *Rule* he developed a formation period with elements that might now be called candidacy, postulancy and novitiate, with profession at the end of the novitiate. His written document, the *petitio*, the first such document to be required by a community, "is

⁸⁰ "Suscipiendus autem in oratorio coram omnibus promittat de stabilitate sua et conversatione morum suorum et oboedientia, coram Deo et sanctis eius, ut si aliquando aliter fecerit, ab eo se damnandum sciat quem irridit" (*RB 1980*, pp. 268-269).

⁸¹ See *RB 1980* for a very good summary of the issues connected with the commitment prescribed by Benedict. His notes through this section, "Appendix 5: Monastic Formation and Profession," pp. 437-466, are especially well done.

⁸² See *Summa theologica*, II-II, 186, a. 6-7.

⁸³ See *RB 1980*, pp. 452-455; 451; *The Rule of the Master*, 89.11, "Sec, brother, you are not promising anything to me, but to God and to this oratory and holy altar." Later Benedictine tradition clearly regarded the "profession" as true *vows* and it was not until recently that the issue reemerged. The point, of course, is that however the act is viewed, it was certainly of decisive importance to the monk as viewed from his vantage point. See Fry's note 22 on page 449 for a listing of the better articles on the Benedictine profession; see especially J. LECLERCQ, "Evangelio y cultura en la historia del compromiso en la vida religiosa" (*Los consejos evangelicos en la tradición monastica*, in *Studia Silensia I*, Silos, Abadía de Silos, 1975, pp. 327-342). For a juridical analysis of *stability*, see J. LAHACHE, "Stabilité monastique," in *Dictionnaire de droit canonique*, (= *DDC*), R. NAZ, ed., Paris, Librairie Letouzey et Ané, 1957, vol. 7, cols. 1078-1086.

an important step in the development of a consciousness of the juridical character of profession,⁸⁴ and is of decisive consequence in the life of the monk.⁸⁵ Also worthy of mention is Benedict's understanding of stability which "[...] adds to obedience the element of perseverance in it, as well as connoting the cenobitic context and specific place in which that obedience is normally to be rendered."⁸⁶

It is also interesting to note that in the public statement of commitment Benedict requires no formal commitment of poverty or virginity, both presumed by the *Rule*. This remains true in Benedictine communities which still require a three-fold commitment—obedience, stability and “conversion of morals”—which is obviously not what is understood as the traditional vow formula which includes the three evangelical counsels. However, by vowing obedience according to the *Rule*, as is required, the novice implicitly makes the vows of poverty and chastity. There are some institutes that add an additional or particular or fourth vow which expresses a particular aspect of their life or ministry, e.g., to work in foreign missions, to serve the poor or the sick. “In this perspective, the ‘Benedictine vows’ were seen as distinct obligations peculiar to the monastic life while implicitly including the three evangelical counsels.”⁸⁷

The first paragraph of the Prologue of *The Rule of St. Benedict* opens with the words:

Listen carefully, my son, to the master's instructions, and attend to them with the ear of your heart. This is advice from a father who loves you; welcome it, and faithfully put it into practice. The labour of obedience will bring you back to him from whom you had drifted through the sloth of disobedience.⁸⁸

⁸⁴ See *RB 1980*, p. 453.

⁸⁵ It must be remembered that “Monastic profession in the West, as in Egypt of the fourth century, was an act of the monk, not a sacramental rite or an act of the Church” (*RB 1980*, p. 454).

⁸⁶ *RB 1980*, p. 465. Much discussion surrounds the understanding of the third element of Benedictine profession, what is often called “conversion of morals.” For a good overview, see *RB 1980*, pp. 457–466.

⁸⁷ *RB 1980*, p. 457. See also J. LECLERQ, *op. cit.* This matter of an additional or ancillary vow as central or characteristic to the life or ministry of the institute will return in a later Chapter.

⁸⁸ “*Obsculta, o fili, praecepta magistri, et inclina aurem cordis tui, et admonitionem pii patris libenter excipe et efficaciter comple, ut ad eum per oboedientiae laborem redeas, a quo per inoboedientiae desidiam recesseras*” (*RB 1980*,

The obedience that the monk owed was to be immediate and absolute to the abbot as to Christ.⁸⁹ While it was to be prompt, cheerful, loving and without murmurs, the *Rule* provides for the possibility of representation.⁹⁰ The abbot was to see the monks as sons, the monks were to regard the abbot as a father. In keeping with the desert tradition, obedience was an aid to growth in humility by mortification of the will.⁹¹ Chapter 5 says that the monks are to have an attitude to obedience which allows them to: "abandon their own will, and lay down whatever they have in hand, leaving it unfinished."⁹² Olphé-Galliard points out that while it will take several generations to work out this obedience of will, "[s]ubmission of judgement, we think, is at least an implication of the *bonus animus* that St. Benedict expects of the obedient monk."⁹³

The centuries which follow will bear eloquent testimony to the excellence of Benedict's contribution. In balance, however, it is necessary to point out that the understanding of obedience has yet to face some development.

By concentrating attention on the spiritual value of unreflecting obedience it [the *Rule*] encouraged a subjective, voluntarist attitude of mind which placed the value of the act of obedience before the value of individual effort to ascertain and accomplish the will of God in the corrupted currents of this life, or rather, to speak more accurately, which made obedience the one and only means of ascertaining God's will. The *Rule* takes no account of the psychological fact that to obey from subservience or indolence or lack of principle is a fault as common as disobedience.⁹⁴

pp. 156-157).

⁸⁹ *RB 1980*, pp. 187-189.

⁹⁰ *RB 1980*, Chapter 68, p. 291.

⁹¹ In fact the twelve degrees of humility can readily be seen as the twelve degrees of obedience. See *RB 1980*, pp. 191-203.

⁹² *Ibid.*, pp. 187-188.

⁹³ OLPHÉ-GALLIARD, pp. 34-35. P. DELATTE, in his *Commentaire sur le Règle de S. Benoit*, 9^e éd., Paris, [np. 1931], p. 102, when commenting on this part of the *Rule*, makes immediate reference to Ignatius' *Letter on Obedience*. More will be said later regarding the levels of obedience as understood by Ignatius.

⁹⁴ *Fm Pachomius*, p. 75.

There is no doubt, especially since the monk has the opportunity to make a representation to the superior, that this evaluation is somewhat harsh. Benedict does lay the foundation for later developments, and we must be careful not to judge his world from the perspective of our own.⁹⁵

4. Benedictine Reforms

The centuries which followed Benedict marked great changes in Europe and in monasteries, which more and more became part of the cultural and economic world where they were located. Pope Gregory the Great (590–604), a monk himself, sent his own monks to evangelize England and later, after the influence of Bede, much of Europe was introduced to the Rule of Benedict by missionary monks, a new phenomenon in Europe. Where they erected a monastery there were often established residences of monk-bishops. If a king or head of state converted, the whole clan might move into solitude with him, where he would add the role of abbot or even bishop to his existing prestige and authority.

The Frankish Church suffered from “clerical corruption, ignorance, immorality, pagan survivals, extreme diversity in religious practice and wide spread seizure of Church property [...].”⁹⁶ Boniface is cited as the most successful of the missionaries who, “succeeded not only in winning numerous converts [...] but also in creating a solid ecclesiastical organization built around a series of newly established bishoprics [...] which served as missionary posts and as educational centers training a disciplined clergy to man the key positions in the emerging Church

⁹⁵ Cf. A. M. DE ALDAMA, *The Constitutions of the Society of Jesus: An Introductory Commentary on the Constitutions*, A. J. OWEN, trans., (of *Iniciación al Estudio de las Constituciones*), Rome, CIS, 1979), (= DE ALDAMA, *Cons.*), St. Louis, IJS, 1989, p. 2, notes that Benedictine influences can be seen in the early works of Ignatius. He also indicates that there is an oral tradition from the monastery of Monte Cassino which holds that Ignatius studied the rule of Benedict during his forty day stay there in the spring of 1538, while he directed Doctor Ortiz through the Spiritual Exercises. In his note 5, p. 2, DE ALDAMA refers to Benedictine authors who attest to this tradition: A. WION, *Lignum vitae et decus Ecclesiae* (1595); M. SCIPIONE, *Elogia abbatum cassiniensium*, Naples, 1630; C. GAETANI, *De Religiosa S. Ignatii sive Eneconis fundatoris Societatis per Patres Benedictinos institutione*, Venice, 1641. Jean RHO, in his book *Achates*, Lyon, 1644, answering the exaggerations of D. GAETANI, admits that St. Ignatius read the Rule in Monte Cassino and even took notes from it.

⁹⁶ R. E. SULLIVAN, “Carolingian Reform,” in *NCatEnc.*, vol. 3, pp. 140–141.

organization.’’⁹⁷ The programme was supported by a series of Church synods which the rulers, especially Pepin III, king of the Franks, promulgated as law. The dream was to create a Frankish Church ‘‘closely allied but subordinate to Rome.’’ Frankish rulers and clergy were not enthusiastic in their support of this plan.

By the rise of Charlemagne (*ca.* 770) many were thoroughly worldly and general decadence affected most of the monastic communities in Europe, especially in France. What had begun as havens of prayer in deserts or mountains for those who left behind cities, were themselves becoming sprawling feudal estates often surrounded by boroughs, especially in southern Germany and Burgundy. Most monks were now in religious orders and on their way to becoming clerics. They thought manual labour to be beneath their dignity, and they spent their time reading, writing and as artists. Churches and liturgies grew in bulk and solemnity as the monks expressed worship to God on behalf of those who were less fortunate.

In the face of a widening chasm between the East and the West, political and economic fragmentation in Europe, and the mistaken belief that Benedict’s *Rule* was the only rule, Charlemagne decided to unify and reform all monasticism under the single Benedictine *Rule*, disciplinary and liturgical code. He died before his goal was accomplished but his son, Louis the Pious continued the work which failed, not only because the plan was too ambitious for the structures available for the times, but because the Empire itself disintegrated. The project did have lasting effects however, in that it strengthened the myth that Benedict’s was the only *rule*, and ‘‘[...] by drawing up a code of observance and giving a commentary on the *rule* Benedict of Aniane had provided a norm, a document, to which future generations could and did return.’’⁹⁸

⁹⁷ *Ibid.*

⁹⁸ *Monasticism*, p. 45.

5. Cluny

Out of the ashes of the empire a new constitutional era was born at the Abbey of Cluny, erected in Burgundy in 909. It is important to this discussion for several contributions which it made.

To protect it from lay or episcopal usurpation the founder had subjected it to the Church of St. Peter in Rome, i.e., to the papacy, as its "own" Church. This, while the papacy was for long in eclipse, was a purely negative protection, but when the age of reform and papal government began Cluny was well placed.⁹⁹

The first three abbots did little more than guide and reform other monasteries such that Cluny came to be regarded as the spiritual parent of an extended family. Odilo, the fourth abbot (994–1047), and his successor Hugh the Great, however, set policies which made the reformed houses directly dependent on the abbot of Cluny.

Each house founded, reformed, or accepted by Cluny, with very few exceptions, lost its abbatial status and its corporate independence. Its prior was appointed by the abbot of Cluny and all the monks took their vow of obedience to him. All were thus technically monks of Cluny, but in fact they continued to live in their own monastery. The bond with Cluny was twofold: the spiritual allegiance of the religious profession, and the legal—one might almost say feudal—link of the charter of incorporation, different in details in every case, which bound the dependent monastery to an acceptance of all Cluniac customs and disciplinary decrees. The abbot of Cluny was supreme, and there was no delegation or decentralization.¹⁰⁰

Thus the abbots of Cluny accomplished in their more than a thousand monasteries (some estimates are as high as two thousand), what the papacy would later claim for itself in relation to the whole Church, direct and immediate ordinary power.¹⁰¹ The structure did not develop constitutionally, and general chapters were not yet conceived. The lines of authority led directly

⁹⁹ Ibid., p. 48.

¹⁰⁰ Ibid., pp. 48–50.

¹⁰¹ Cf. *Fm Pachomius*, pp. 11–12. Soon, in the medieval period, religious orders will clarify their structures with, in general, a supreme moderator or superior general with advisors or councils directing provinces or regions with provincial superiors and councils. The organization from Cluny, though much simpler, helped lay the groundwork for these later developments.

to the abbot of Cluny. Those who joined were motivated chiefly by a desire to participate in something that seemed to work and in the liturgical life, the splendour of which has never before nor since been seen. While the influence of Cluny on the Gregorian reform has been overstated and corrected, there is no doubt that its immediate command structure, the direct links to the Roman Pontiff, and its spiritual stability in the face of conflict between the empire and the papacy, made it useful to a Church on the eve of reform.¹⁰²

During the eleventh century, while Europe continued to see the spread of the Benedictine rule, another movement was revived, that of the ascetics and hermits. Benedict himself had indicated that the cenobitic life was the best preparation for the eremitical life,¹⁰³ and with a new influx of influence from the East upon the West, reformers sought a return to monastic models from its desert birthplace.¹⁰⁴ The movement was embodied in a plethora of new institutes, each with its own expression of the traditional monastic vision, most making no lasting or significant contribution.¹⁰⁵ Some communities, however, should be highlighted.

The "desert" settlement of hermits at Camaldoli, near Arezzo, was founded by Romuald of Ravenna (*ca.* 950–1027), who left a Cluniac monastery with the desire to form a community which expressed the values of Egyptian monasticism. His monks lived in a cluster of separate cells, ostensibly as hermits, but "came together in the common oratory, refectory, and meeting-hall only at certain times and occasions." It is interesting since it was the first institute in the

¹⁰² It is pointed out that of the six monks who were popes from 1073 to 1119, at least three were Cluniacs, while many others were named cardinals, legates and bishops. See *Monasticism*, p. 51.

¹⁰³ See *RB 1980*, p. 169; see also Chapter 73.

¹⁰⁴ It is suggested that the interest in the past was fuelled by the arrival in Italy of refugees from the Turk's invasion of Asia Minor, and "[...] the approach to Rome of a fervent Greek monachism from south Italy with St. Nilus at Grottaferrata," and "[...] to a new attitude to the literary memorials of the desert fathers" (*Fm Pachomius*, p. 17).

¹⁰⁵ It is pointed out that while many of these monasteries helped meet the needs of the "[...] more complex and articulated society of the later Middle Ages," it was here that Western monasticism developed divergent historical paths from the monastic expression of the Orthodox Church where the tradition remained more singular (*ibid.*, p. 16).

West where hermits drew up a set of rules, and the first in which two kinds of life, that of the hermit and the cenobite, were combined.

John Gualbert (990–1073), formerly a Cluniac and Camaldoli monk, went further than Romuald in the community he established at Vallombrosa, near Florence. His foundation was probably the first to interpret the rule so strictly as to exceed the intention of Benedict. “Vallombrosa was therefore an anticipation, if not a forebear, of Tiron, Savigny, and the early Cistercians, and, centuries later, of La Trappe and the Primitive Cistercian revival of the nineteenth century.”¹⁰⁶

A second contribution attributed to Vallombrosa is a phenomenon called the *conversi*, a class of non-clerics which later evolved into lay brothers. Gualbert wished to free the monks from administrative distractions, so the first incarnation of *conversi* oversaw the temporal affairs of the monastery, a station which led to much abuse. In a later application, the *conversi* of the Grandimontines (c. 1126) not only administrated the economy, but were given “supreme responsibility.” “This put a heavy strain on a weak link and ultimately led to a scandal, when the *conversi* rebelled and held the monks up to ransom for a better standard of living.” Later still, when Gilbert of Sempringham, in England, gave his *conversi* similar powers, funds were embezzled and he was blackmailed for an easier way of life. It was not surprising, then, that when St. Dominic proposed the same kind of structure his advisors vetoed the notion.¹⁰⁷

6. The Carthusians

Bruno of Rheims formed a community in the Grande Chartreuse in 1089, which has the distinction of remaining pure and undiluted. With a succession of good leaders, and a refusal to lower standards, the Carthusian hermits attracted serious, dedicated recruits, and remain to the

¹⁰⁶ Ibid., p. 18.

¹⁰⁷ Ibid., pp. 33–34.

present day a small but impressive *élite* among religious institutes. "Their constitutional significance was to carry the work of Romuald of Camoldoli a stage further, to domesticate the eremitic life without destroying it."¹⁰⁸ It was not for the Carthusians, however, to make the contributions that would allow monasticism in Europe to effectively respond to the two major difficulties which had challenged reformers. Benedict's *Rule* had, by this time, suffered so many aberrations of interpretation and application that it was virtually impossible to separate out the essence and purity of his vision of monastic life. Also, there was absent an impartial standard or norm which could prevent reform from being anything but local, personal, and transient.¹⁰⁹ The need was for a return to simplicity and for a structure to protect it.

7. The Cistercians

A community of white monks¹¹⁰ was erected at Cîteaux in 1098. The prior, Aubrey (or Alberic) (1099–1109) and his successor, Stephen Harding (1109–1234) developed an institute which moved away from the secularization and unbalanced life-style which had invaded monasticism, towards more fervour, abnegation and simplicity.¹¹¹ It was determined early on that any foundation from Cîteaux was to be an independent abbey, not a priory as in the Cluniac model. There was to be, however, a common rule observed "to the last dot,"¹¹² with common customs, prayers, books, etc., such that a monk from one foundation should feel at home in any

¹⁰⁸ Ibid., p. 21.

¹⁰⁹ Ibid., p. 22.

¹¹⁰ So called for the colour of the habit they wore.

¹¹¹ Until earlier this century it was thought that the *Carta caritatis*, or the Charter of Charity, the Cistercian Rule, had been the exclusive work of Stephen Harding. It is now known that the document went through several stages of evolution. See *Fm Pachomius*, pp. 23–30. Cf. J. B. VAN DAMME, *Documenta pro Cisterciensis Ordinis historiae ac iuris collecta A.*, Westmalle, 1959, p. 18.

¹¹² "Ad apicem litterae" became almost a battle cry of later reformers.

house. A balance of prayer, study, and manual labour was restored; feudal and economic ties that encumbered other monasteries were rejected; and postulancy and a full year of novitiate were restored. The abolition of infant oblation, a practice which had preceded St. Benedict,¹¹³ removed the distraction of children from the monastery, strengthened the spiritual and formative role of the novitiate, and enhanced the power of the novice master in vocational decision making.¹¹⁴

A more important step was the successful integration of the *conversi*, which not only made a form of monastic life accessible for the first time to peasants and labourers, but also allowed for the extension of the Cistercian's cultivated land boundaries. The innovative "grange" system, i.e., the establishment of living quarters set apart for the lay brothers was widely used throughout Europe.

This economic deployment of labour, and the escape of all Cistercian lands from the restrictions and complications of manorial agriculture and tithes, was an agrarian revolution of some magnitude, which made it possible for the monks to bring marginal land under cultivation and to practice pastoral farming on a large scale.¹¹⁵

This system eventually not only brought the Cistercians great prosperity, it also assured the future place of the *conversi* in the religious life of the Church.

Several constitutional developments also took place during this evolution of monastic life style. Very early councils of the Church established episcopal visitation rights to monasteries in their territories, and even the rule of Benedict acknowledges the right of the bishop to intervene when certain problems arise, and to oversee abbatial elections.¹¹⁶ These practices slowly faded

¹¹³ Infant oblation was the practice of parents dedicating their children to religious life—to be educated in the monastery and later accepted as monks. It is presumed to have pre-dated Benedict in that his rule makes casual mention of it in Chapter 58, *RB 1980*, pp. 269-70.

¹¹⁴ See *Fm Pachomius*, p. 28.

¹¹⁵ *Monasticism*, p. 74.

¹¹⁶ *RB 1980*, Chapter 64, p. 281.

and the Cistercians gradually gained autonomy, "at first *de facto*, by the acceptance by the bishop of the *Carta Caritatis*, [the Cistercian rule,] and later *de jure*, when exemption from episcopal control was standardized."¹¹⁷ This movement was assisted by three other structures: the development of chapters of faults into yearly general chapters, which eventually gained supreme authority; standardization and regulation of abbatial elections; and the yearly visitation of monasteries by the founding abbot to ensure that a uniformity of practice and code was being observed.

The body thus established was in a true sense, and for the first time in Europe, a religious order, a body of religious houses, scattered in different regions, linked together by legislation and disciplinary control, and based upon a focal point, the first mother, Cîteaux.¹¹⁸

Unlike Cluny's, this system maintained the equality and independence of each house, and while general chapters were usually held at Cîteaux, the abbot there was only the first among equals. It should be pointed out, however, that this organization represents a federation, rather than a fully developed order in that it lacks the equivalent of a superior general, there are no true regions defined such as provinces, and the rights of a monk to remain in the abbey of his profession precluded the superior's ability to move him to another house or region. These innovations would soon emerge.

8. Bernard of Clairvaux

Bernard of Clairvaux has been called "an apostle of monastic obedience," "the representative figure," and the "accredited spokesman" for his age.¹¹⁹ He is well known for

¹¹⁷ *Fm Pachomius*, p. 26. "Exemption, generally speaking, denotes a privilege whereby persons, places, or things are withdrawn from the jurisdiction of a superior to whom they would otherwise be subject" (J. O'BRIEN, *The Exemption of Religious in Church Law*, Milwaukee, The Bruce Pub. Co., 1942, p. 1).

¹¹⁸ *Ibid.*, p. 27

¹¹⁹ *Fm Pachomius*, p. 76.

the disagreement he had with Peter the Venerable,¹²⁰ the abbot of Cluny, whom Bernard saw as too lax in his approach. Their heated exchange, however, led each to respect the holiness of the other, and eventually a warm friendship formed between the two. Outspoken as he was, Bernard intervened in many matters, including “the delicate operation that led to the condemnation of Abelard.”¹²¹ In 1146–47 he was an official advocate of the Second Crusade, and he also exercised considerable influence over the development of the Knights of Templar, facilitating their adoption of the Rule of St. Benedict. But it is not for these that he is important to this study.

Bernard made three contributions to the development of the idea and practice of obedience. The first pertains to a problem which had surfaced earlier, and is stated by D. Knowles as follows:

[...] what was to be done if the customs of a monastery were found incompatible with the observance of the Rule, and if then the abbot bids the monk abide by the daily domestic practice? St. Bernard, speaking here in agreement with current tradition, bids the monk follow his carefully formed conscience, even against common opinion, and he is a witness to the essential role of the monastery and of the abbot as existing primarily for the profit of the soul of the individual monk, not for any external work or purpose.¹²²

The gradual emergence of the principle that the rule is superior to the abbot has been observed, but here Bernard added nuances. When he introduced the role of a carefully formed conscience into this context he extended the understanding of what was previously recognized as “manifestation.” While Bernard would still advocate the traditional teaching that the superior stands in the place of God, that for this reason the subject when obeying a superior is really following the will of God, and is therefore bound to obey the lawful command of a superior unless it is clearly contrary to the gospel, nevertheless, his thinking here strengthens the dignity

¹²⁰ First called Venerable in one of Bernard's letters.

¹²¹ P. ZERBI, “Bernard of Clairvaux,” in *NCatEnc.*, vol. 2, p. 336, col. 2.

¹²² *Fm Pachomius*, p. 80.

and especially the personal responsibility of the individual monk in carrying out an act of obedience. In the spirit of "the Cistercian battle-cry, *ad apicem litterae*, 'to the last dot,' " Bernard believed that "[...] the individual monk had the duty [...] of examining the abbot and the traditions of his house, and of departing if they were found wanting."¹²³

Bernard's second contribution can be found in his treatise, *De praecepto et dispensatione*,¹²⁴ his most thorough treatment of obedience. In chapter XVI he asks the question, "Are there cases when it is permitted to change monastery and go to another?"¹²⁵ In a spirit that recognizes that "perseverance and stability were intimately connected in Bernard's mind with obedience,"¹²⁶ he enunciates the principle that generally has been accepted by the Church and incorporated into most subsequent Rules. He says that no transference is lawful except to a notably more austere life.¹²⁷

Bernard's most important contribution, however, considers the limits of the vow of obedience:

Only that which I have promised can be demanded of me. The nature of the monastic profession defines the limit of obedience [...] he who has taken vows cannot be forced beyond his profession by the law of obedience, nor can he be kept from realizing what he has vowed [...] still less can he be compelled to act against it [...] Therefore the command or the prohibition of the superior must not go beyond the limits of the monk's profession [...] he may not increase

¹²³ Ibid., p. 77.

¹²⁴ BERNARDUS CLARAEVALLENSIS, *sanctus, Opera omnia, ad postremam Jo aliasque insignioris notae edisimis curis retractata et auct Edente J. Gnocchi, 1850-1852, (= Opera), 3 vols., Capvt V, cols., 761-798.*

¹²⁵ Op. cit., col. 788, "*Transitus et mutatio monasterii quatenus probanda.*"

¹²⁶ G. R. EVANS, *The Mind of St. Bernard of Clairvaux*, Oxford, Clarendon Press, [1985], p. 19.

¹²⁷ In this section Bernard begins by stating the principle in reverse, i.e., that he could not counsel one to leave the monastery to follow a rule of lesser observance. After quoting various authorities he still indicates that one whose conscience impels him to move to a monastery of stricter observance should have the permission of the superior. It is interesting to note that Bernard himself transferred from the monastery he entered to one which he saw as being of stricter observance. The Jesuit *Constitutions* allow for a Jesuit to transfer to the Carthusians (G. GANSS, *The Constitutions of the Society of Jesus*, [= GANSS, *Cons.*], St. Louis, *IJS*, 1970, p. 107, [99], 42, also note 22).

the obligation of my vows without my consent, nor may he lessen it without clear necessity.¹²⁸

Bernard seems to anticipate a later age by introducing several principles here. The first concerns rights and obligations, not only of the monk who makes a profession, but also of the superior who commands. Both are constrained by the “nature of the monastic profession” which itself is the measure of obedience. It has already become accepted in the tradition that one is not bound to obey a command which is contrary to the gospel, or to the law of God. It is a small step to say that one can not be compelled to act against conscience. But here, Bernard speaks of a vow almost as though it were a contract, the terms defined and measured by the profession, which is understood according to the rule. While he is clear that “perfect obedience knows no legal limit,”¹²⁹ he is careful to point out that legal limits do exist and must be observed.¹³⁰

9. The Gilbertines

Gilbert of Sempringham, a priest of Lincolnshire in the mid-twelfth century, developed an eclectic rule drawn from many sources for the institute which he founded, the Gilbertines. It is worthy of mention for two reasons. First it is a representative example of the “double” orders

¹²⁸ *Fm Pachomius*, p. 78. “Si modus est obedientiae tenor professionis, nec se valeat extendere potestas imperantis, nisi quatenus attigerit votum profitentis; [...] Quamobrem quisque professus in quovis genere salutiferae vitae nec ultra obedientiae lege (a) cogendus, nec citra est inhibendus, quam sua ipsius videntur complecti professio. Quanto minus contra? [...] Ergo praelati iussio vel prohibitio non praetereat terminos professionis. Nec ultra extendi potest, nec contrahi citra. Nil me praelatus prohibeat horum quae promisi, nec plus exigat quam promisi. Vota mea nec augeat sine mea voluntate, nec minuat sine certa necessitate. Necessitas quippe non habet legem, et ob hoc excusat dispensationem. Voluntas vero, quia sola meretur retributionem, etiam sola non immerito gradum altiore usurpat” (*Opera*, Capvt V., cols., 768-769).

¹²⁹ “[...] perfecta obedientia legem nescit [...]” (*ibid.*, col. 769).

¹³⁰ This important principle will be discussed in later Chapters, especially in light of the nature and limits of the Jesuit fourth vow.

of the day, i.e., a convent of women with a contiguous house of priests who served it.¹³¹ But of more importance, it was the first institute with a single supreme head.¹³²

10. The Military Orders

The twelfth century also saw the rise of a unique phenomenon, the so-called military orders. The Sovereign Military Order of the Hospital of St. John of Jerusalem, of Rhodes, and of Malta (commonly known as the Knights of Malta, or the Knights Hospitaller) received approbation in 1113. They followed an adaptation of Augustine's Rule, and their aim was to defend pilgrims and the Christian kingdom against Moslem attacks.¹³³ The Poor Fellow-Soldiers of Christ and the Temple of Solomon (*Pauperes commilitones Christi templi Solomonici*), known as the Templars, was founded in 1119 under the Rule of St. Benedict. Their aim was to protect and guide pilgrims in the Holy Land, and later they added the obligation "to fight all 'infidels' threatening Christianity and to repel any force menacing Jerusalem or their religion."¹³⁴

In both orders the supreme heads,

[t]he Grand Master and Grand Prior were chosen by an electoral committee appointed by a complicated system of election and co-option. Both orders indeed had general chapters, and the Templars also annual chapters in each priory, but the latter were attended only by the commanders of the other houses and the general chapter by the priors and any other invited by the Grand Master. As the Master appointed to all offices, the general chapter was to a large extent a meeting of his creatures, and though it had supreme legislative and corrective power it was in fact under the Master's control. Above all, the control of the

¹³¹ The first of these "double" houses of this period was established by Robert of Arbrissel at Fontevrault, and is notable since the abbess had jurisdiction over not only the nuns but the priests as well—a situation owing to the fact that many of the nuns were of the nobility and had sizable doweries while generally the priests were of the lower class and poor (see *Fm Pachomius*, p. 34).

¹³² See R. GRAHAM, *Saint Gilbert of Sempringham and the Gilbertines: A History of the only English Monastic Order*, London, E. Stock, 1903, xi, 240 p., p. ill.

¹³³ See O. P. SHERBOWITZ-WETZOR and C. TOUMANOFF, "Knights of Malta," in *NCatEnc.*, vol. 8, pp. 217-220.

¹³⁴ *Ibid.*, pp. 992-994.

whole great body by the Grand Master or Grand Prior was an important step towards the General of a religious order.¹³⁵

While there may be some discussion regarding the method of election, there is no doubt that the military orders were the first to introduce the elective principle on a broad scale. They were also the first to organize by region and country, a structural principle adopted by almost all subsequent institutes, and known as provinces. Both orders were granted not only the protection of the Holy See, but they accrued many privileges as well. For instance, the Templars were granted the right to have no interference in their elections from either secular or Church leaders.

Of chief importance to us, however, is that these knightly orders were the first to vow obedience to the pope. This occurred for at least three reasons. First, the members of these orders came from many dioceses and it was not practical to have them bound in obedience to the bishop of their home diocese. Second, due to their travels the members travelled through many dioceses and served in the Holy Land where there were no bishops. The pope was the only one in the Church with the authority to send men across diocesan lines. "Third, [t]hey were the 'Pope's Men' in carrying out the Holy War."¹³⁶

D. The Rise Of The Mendicants (ca. 1200–1500)

1. The Friars

It was stated earlier that prevailing political and social conditions had a substantial effect on the development of the style and practice of religious obedience. This is clearly observable in the case of the appearance of the first two orders of friars, the Dominicans and the

¹³⁵ *Fm Pachomius*, pp. 37–38. Since Ignatius was a soldier it is not surprising that he would have taken notice of the structure of the military orders. Several characteristics found their way into the organization of the Society, notably that the general appoints all superiors and those in major offices in the Society. More will be said later regarding privileges and the understanding of obedience.

¹³⁶ T. SHANAHAN, *The Jesuit Vow of Obedience to the Pope: Universal Service in the Vineyard of Christ*, (= SHANAHAN), Th.D. Diss., Fordham Univ., Univ. Microfilms International, Ann Arbor, MI, 1975, p. 18. Shanahan points out that a letter from Cardinal Guidiccione in 1542 or 1543 first conceded to the general of the Society of Jesus the power to send his men to the faithful. He later points out that this was also observed in *Licet debitum* in 1549 (ibid. pp. 51–55).

Franciscans. So significant were the contributions of these institutes to the development of religious life, indeed to the Church, it is important to consider the world into which they emerged.

M. A. Corselis summarizes the situation of the period in the following three statements:

1. Feudalism was in decline: the "closed economy" had disappeared and the powers of the local landowners and of the bishops, who held a like function in society, were failing.
2. At the same time a revolution in civic life was taking place; that is to say, there was an increasing independence among townsfolk, once oppressed but now gaining liberties and privileges, leading to a protracted struggle with the old nobility, still land-owning and still governing. This resulted in the establishment of cities and communities independent enough to raise their walls and turrets against the castles of the nobles.
3. In consequence the opposition grew increasingly violent and bitter between the *majores*, the richer classes (in which must be included the still powerful ancient nobility, as well as the new-rich among the bourgeoisie, who are also strongly entrenched) and the *minores* (the lower ranks of society, still a victim class but now making greater and greater claims).¹³⁷

In a similar analysis, D. Knowles notes the following as the pre-history of the friars:

[...] first the need of the urban population, both proletariat and bourgeoisie, for the devout life; secondly, the appeal of poverty and the communal life; and thirdly, the urge for moral exhortation and a study of the life of Christ, rather than liturgical prayer. It will be seen at once that the principal "notes" of the friars' movement, preaching, mendicancy, and the invitation to the "third" or "penitential" order of lay people, correspond exactly to these needs. The rift, especially in Italy and Provence, between the official, moneyed Church, whether of high ecclesiastics or great religious corporations, and the masses of the people, whether well-to-do townspeople or illiterate peasantry, was growing yearly wider, and the threats to the sacerdotal and sacramental system foreshadowed a cleavage such as did in fact take place three hundred years later.¹³⁸

D. Knowles goes on to suggest that these orders of friars contributed to arresting or delaying this movement which eventually led to the Reformation.

¹³⁷ CORSELIS, p. 45.

¹³⁸ *Fm Pachomius*, p. 43.

2. The Franciscans

The life and personality of Francis is marked by the authenticity of the spirit of his conversion. It is not surprising then, that the same genuine, spontaneous spirit of his nature shines through all of his writings, and profoundly affects his approach to the practice of obedience which is based on a conspicuous return to the Gospel. In general, Francis understood his authority as spiritual, and he wanted no sanctions other than conscience. The community was to be understood as a brotherhood, known as the lesser brothers or the Friars Minor, where "each and all should be submissive to all and each."¹³⁹ Thus, no one was to be called prior, or superior, but rather, "minister," and was to conduct himself as though he had been assigned the task of washing their feet. "His concept of office as service, conferring not importance or privilege but responsibility and obligations, and of obedience as life saving, was simply a restatement of Christ's teaching in the Gospel."¹⁴⁰

The passage most often quoted to illustrate Francis' thought on obedience is the following:

Our Lord says in the Gospel: "None of you can be a disciple of mine without parting with all his possessions" (Lk 14: 33). And "whoever cares for his own safety is lost" (Mt 16: 25). That man parts with all his possessions and loses his body and soul who gives himself totally to obedience in the hands of his superior. Whatever he does or says, knowing it is not against the other's will, provided it is good, is true obedience. If ever the subject sees something that would be better and more useful to his soul than what his superior has ordered him, he shall sacrifice his will to God; he should take every care to put into effect what the superior has proposed. That which contents God and one's neighbour is true and loving obedience.

If a superior should order a subject to do anything against his conscience, although he is not to obey yet he is not to renounce him, and if on this account others persecute him he is to love them the more for God's sake. He who prefers to suffer persecution than to separate himself from his brothers truly lives in

¹³⁹ CORSELIS p. 42. See also, P. R. BLAINE, "Power in Weakness" in the Spirituality of St. Francis of Assisi, Roma, Pontificia studiorum Univ., St. Thoma Aq., 1982; and *The Plan for Franciscan Living: The Rule and General Constitutions of the Order of Friars Minor*, Pulaski, Wis., English-Speaking Conference of Provincials, 1974.

¹⁴⁰ R. B. BROOKE, *The Coming of the Friars*, (= BROOKE), London, G. Allen & Unwin, [1975], p. 28.

perfect obedience, because "he lays down his life" (Jn 15: 13) for his brothers. There are many religious who, on the pretext of seeing a better course than their superiors command, look back (cf. Lk 9: 62) and return to the vomit (cf. Prov 26: 11) of their own will. Such men are homicides; by their bad example many souls are lost.¹⁴¹

These strong words are tempered when one sees that for Francis obedience is necessarily linked to charity. In fact, in his *Salutatio virtutum*, he links in pairs: wisdom and simplicity, poverty and humility, obedience and love, and, typical for Francis, one must be born again to attain these heroic virtues.¹⁴²

The Franciscan legacy to the Church developed not by design, but as a result of circumstances and necessity. Francis did not at first (if ever) intend to found an institute, and he did not take seriously the fine points of canonical thinking; nevertheless, perhaps because of his strong sense of the Church, in 1209 he presented himself, his eleven followers, and a short Rule to Innocent the III for approval.¹⁴³ By 1219, when Francis left for the East, and it was apparent that exaggerations and divisions were affecting the institute, "[...] ecclesiastical authority and ultimately the papacy moved in and applied to the Lesser Brethren some of the most elementary

¹⁴¹ "Dicit Dominus in Evangelio: Qui non *renuntiaverit* omnibus, quae possidet, non potest meus esse discipulus (Lc 14: 33); et: Qui voluerit *animam suam salvam facere* perdet illam (Lc 9: 24). Ille homo relinquit omnia, quae possidet, et perdit corpus suum, qui se ipsum totum praelata. Et quicquid facit et dicit, quod ipse sciat, quod non sit contra voluntatem eius, dum bonum sit quod facit, vera obedientia est. Et si quando subditus videat meliora et utiliora animae suae quam ea, quae sibi praelati praecipiat, sua voluntarie Deo sacrificet; quae autem sunt praelati, opere studeat adimplere. Nam haec est caritativa obedientia (cfr. 1 Petr 1: 22), quia Deo et proximo satisfacit.

"Si vero praelatus aliquid contra animam suam praecipiat, licet ei non obediat, tamen ipsum non dimittat. Et si ab aliquibus persecutionem inde sustinuerit, magis eos diligit propter Deum. Nam qui prius persecutionem sustinet, quam velit a suis fratribus separari, vere permanet in perfecta obedientia, quia ponit animam suam (cf. Joa 15, 13) pro fratribus suis. Sunt enim multi religiosi, qui sub specie meliora videndi quam quae sui praelati praecipiant, retro aspiciunt (cfr. Lc 9: 62) et ad vomitum propriae voluntatis redeunt (cfr. Prov 26: 11; 2 Petr 2: 22); hi homicidae sunt et propter mala sua exempla multas animas perdere faciunt (Admonition III, Cap. III: De perfecta obedientia, in *Opuscula Sancti Patris Francisci Assisensis. Denuo edidit iuxta codices mss.* Caietanus ESSER, ed., Grottaferrata [Roma], Collegii S. Boaventura ad Claras Aquas, 1978, pp. 63-65)" (BROOKE, trans., p. 27).

¹⁴² Ibid., p. 27.

¹⁴³ This First Rule, or *Regula prima*, which seemed to consist of a few key scripture passages linked together, does not survive. The final version, in the papal bull *Solet annuere* is usually referred to as *Regula bullata* or *Regula II. Sec* BROOKE, p. 120, and *Fm Pachomius*, p. 45.

of the canonical rules governing all religious institutes, such as a year's novitiate, formal profession of vows, and local control of individuals."¹⁴⁴

But the most dramatic and far-reaching contributions in the development of obedience happened as a consequence of the new approach the Friars brought to the understanding of the apostolate. Previous communities withdrew *from the world* to the stability of a monastery where for life they were under the authority of a superior. Francis, with his spirit of freedom, led his community *into the world* necessitating the development of new structures. Since a friar might go anywhere to do any work, regions and provinces were developed with local and provincial superiors, called ministers,¹⁴⁵ who were seen to be deputies of the *Dominus Papa*, and who, since they were not elected for life, could return to the common obedience.¹⁴⁶ As a result, Bernard's problem with stability no longer applied, since one could now change houses while remaining a member of the community constituted by the Order.¹⁴⁷ Also, obedience matured

¹⁴⁴ *Fm Pachomius*, p. 45. While it is true that all institutes had a period of probation/formation, which are now generally called the novitiate, the letter of Honorius III seems to be the first time it was imposed upon a community by the Holy See. This document also had the effect of making it formally "illegal" to leave an institute after the profession of vows. See the letter in *Bullarium Franciscanum Romanorum Pontificum: Constitutiones, epistolas, ac diplomata continens, tribus Ordinibus, Minorum, Clarissarum, et Poenitentium, A seraphico Patriarcha, Sancto Francisco, institutis concessa, ab illorum exordio ad nostra usque tempora, Romae, 1754, Typis Sacrae Congregationis De Propaganda Fide, J. H. SBARALEAE, studio et labore, Tomus I, ab Honorio II, ad Innocentium III, p. 6.*

¹⁴⁵ At the General Chapter in 1217 Francis appointed provincial superiors, wardens and guardians. See CORSELIJ, p. 47.

¹⁴⁶ See CORSELIJ, pp. 47-48, and *Fm Pachomius*, pp. 44-48. It is obvious that Ignatius was profoundly influenced by Francis, in fact, "a letter written in 1536 to Gian Pietro Carafa shows that Ignatius regarded the two great founders of the mendicant orders, St. Francis and St. Dominic, as models, though it is not clear that he had read their rules and constitutions prior to the arrival of Polanco." Cf. *MI Epp*, I, 116; *AHSI*, 44 (1975), pp. 140-151; as quoted in DE ALDAMA, *Cons.*, p. 2). Certainly the type of poverty chosen for the Society was inspired by Francis, but Ignatius also incorporated other features of the Franciscan organization, for example, only the superior general is elected for life, and provision now exists even for him to resign.

¹⁴⁷ KNOWLES, p. 48, refers to them as "[...] a single family divided but not separated." Ignatius adopted this thinking, making mobility a key element of the Society. So strong is his thinking on this point that while it is understood that one enters the Society through a province, a Jesuit is available to be sent for service anywhere.

in that, “[...] the minister no longer gives orders to one with no responsibilities but to a cleric entrusted with an apostolic function which requires that he have his autonomy.”¹⁴⁸

Finally the head of the brotherhood, largely through the geographical and other circumstances of Francis’s life, was closely bound to the pope, his cardinals, and the Curia, and thus from the start the first centralized institute was based, not upon a mother house beyond the Alps, nor upon its head, wherever he might be, but upon Rome, and it was inevitable that in the sequel it should be used as an instrument by the papacy. All these tendencies were hastened by the concurrent development of the Friars Preachers.¹⁴⁹

It may be observed that contemporary religious are still able to identify to some degree with the challenge and struggle faced by the early friars. The Church still has not adequately come to grips with a notion of obedience, the theory and categories of which were largely defined in the first millennium to meet the needs of monasticism, but are now practiced by religious men and women, most of whom are actively engaged in the world and who require a degree of apostolic autonomy.

3. The Dominicans

While Dominic’s personality, education and approach stand in marked contrast to Francis’, their two orders of friars had great influence upon one another. The major difference noted by D. Knowles is that, “[...] the Franciscan order was a constitutional monarchy, whereas the Dominican order was a firmly governed republic.”¹⁵⁰ The influence of the Dominicans

¹⁴⁸ CORSELIS, p. 47. It is not hard to understand that the itinerant preachers would have known conflict with local clerics who did not enjoy the benefits of the evangelical renewal nor the same freedom of movement available to the friars. The seeds are being sown here for the eventual publication of *Mutuae relationes* in 1978.

¹⁴⁹ *Fm Pachomius*, p. 48. It is also interesting that the Franciscans were the first religious institute to receive a *cardinal protector*, a direct contact within the Curia, who could serve not only to act on behalf of the institute, but also as a communication link from the pope to the religious. See the excellent article by L.-R. MISSIÈREY, in *DDC*, vol. 2., cols. 1339–1344.

¹⁵⁰ *Fm Pachomius*, p. 55.

through history is impossible to summarize,¹⁵¹ but in the context of this discussion the most significant contribution made by Dominic is seen in the organizational structure he wrote into the "Second Distinction" of his Constitutions, which, owing to the Lateran Council's recent decision which forbade the founding of new religious orders, was based on the Rule of St Augustine.¹⁵² This design has not only survived virtually unchanged to the present day, but has been imitated by various groups and cities in search of a code.¹⁵³

The main points of the Dominican system of government are as follows:

The order was divided into provinces, and the provinces were made up of priories. Each house had its prior, elected domestically by the resident community; each province its provincial prior, elected by a prior and a delegate from each priory; over the whole order was a master-general, elected by the priors-provincial and two representatives from each province. [...] At the conventual chapter all took part, save for minor restrictions in elections. The provincial chapter was very large. [...] The whole chapter, however, functioned as a body only to elect a representative (*diffinitor*) for general chapter and four *diffinitors* from among its numbers who, under the chairmanship of the provincial, performed all the business of the chapter, which was ratified at a plenary session. The provincial prior held office until he died, resigned, or was "absolved" in general chapter. [...] the master-general of the whole order was elected by the prior-provincial and an elected *diffinitor* from each province. His

¹⁵¹ For some of the Dominican influences on the Society of Jesus, see A. HSÜ, *Dominican Presence in the Constitutions of the Society of Jesus: A Study of Dominican Influence on the Textual Make-up of the Jesuit Constitutions in Regard to the Formation of Novices and the Rules for the Novice Master, Based on an Unpublished Manuscript of Juan A. Polanco (1517-1576)*, Excerpta ex dissertatione ad Lauream in Facultate Theologiae, Pontificiae Univ. Gregoriana, Roma, 1971. See also several entries in DE ALDAMA, *Cons.*, but especially pp. 219-221, and by the same author, *Formula*, pp. 37-38, and 73. See also, P-F. MANDONNET, *St Dominic and his Work*, M. H. VICAIRE and R. LADNER, eds., M. B. LARKIN, trans., St. Louis, MO, B. Herder Book, 1945; *Saint Dominic: Biographical Documents*, F. C. LEHNER, ed., Wash., DC, Thomist Press, [1964]; R. F. BENNETT, *The Early Dominicans: Studies in Thirteenth-Century Dominican History*, Cambridge, Univ. Press, 1937; and W. A. HINNEBUSCH, *The History of the Dominican Order*, New York, Alba House, [1966-], 2 vols.

¹⁵² "Ne nimia religionum diversitas gravem in ecclesia Dei confusionem inducat, firmiter prohibemus, ne quis de caetero novam religionem inveniat, sed quicumque voluerit ad religionem converti, unam de approbatis assumat. Similiter qui voluerit religiosam domum fundare de novo, regulam et institutionem accipiat de religionibus approbatis. Illud etiam prohibemus, ne quis in diversis monasteriis locum monachi habere praesumat, nec unus abbas pluribus monasteriis praesidere" (TANNER, c. 13, p. 242). It is interesting to speculate on why it was Francis who was permitted to develop what in effect became a new rule, instead of the more polished and educated Dominic who was told to accept one already existing.

¹⁵³ *Fm Pachomius*, p. 53.

was in effect a life office, save for resignation, but the master was technically amenable to general chapter when this was in session.¹⁵⁴

It has been noted with astonishment how the order emerged with a structure which was fully mature from the beginning.

E. The Influence Of The Holy See On The Development Of Religious Life

Thus far this study has considered some of the significant changes in the patterns of authority which emerged in various communities. The influence of the Holy See upon these practices and upon the constitutions of religious institutes must also be considered. The Carolingian Reform notwithstanding, it was the period of development between the eleventh and thirteenth centuries which introduced the greatest changes.

Innocent III initiated an extensive plan for reform in the Church, including monastic reform, which culminated in the Fourth Lateran Council (1215). Since he died shortly thereafter (1216) the implementation was left to his successors, Honorius II and Gregory IX, but the Council accomplished much. As was mentioned above, it prohibited the founding of new religious orders, and instructed that anyone founding a new house must take the rule of an already approved order.¹⁵⁵ It also imposed general chapters to be held every three years,¹⁵⁶ regular visitations,¹⁵⁷ and reminded abbots not to encroach upon the purview of bishops.¹⁵⁸ There is, of course, a history that resulted in these decrees.

¹⁵⁴ *Fm Pachomius*, pp. 51-52.

¹⁵⁵ See TANNER, c. 13, p. 242.

¹⁵⁶ See TANNER, C. 12, pp. 240-241.

¹⁵⁷ See TANNER, C. 33, p. 250.

¹⁵⁸ See TANNER, C. 60, p. 262.

The seclusion and austere life-style of religious communities had a tendency to make them somewhat independent of Church authority, even though monasticism “[...] enjoyed no special status in the ecclesiastical hierarchy; in the early days certainly a large proportion of the monks never came to the priesthood, and up to the time of the Roman Council in 826 it was not necessary for an abbot to be a priest.”¹⁵⁹ While it was necessary to present candidates for ordination to the bishop, monastic life was generally regarded as “intangible.”

Inevitably, irregularities occasionally crept in, particularly around the control of clerics. This resulted in some tensions between bishops and abbots to which the Church responded with episcopal councils, local and ecumenical, to place the discipline of religious houses under the inspection and control of the bishop.

The Council of Chalcedon in 451 established that no monastery or house of prayer was to be built without the knowledge of the local bishop and that, “throughout every city and province monks should be subject to the bishop.”¹⁶⁰ Similar decrees issued by western councils in the fifth and sixth centuries asserted the control by bishops over the property and liturgy of monasteries in their dioceses.¹⁶¹

Though this norm acted as the standard point of departure in the history of juridical relations between religious and bishops, Fogliasso is quick to point out that at Chalcedon, “[...] not a word is said to revoke the authority that the abbot had enjoyed up to that time, nor to reserve to the diocesan bishop the right to choose the abbot, nor to govern the administrative procedures

¹⁵⁹ C. R. CHENEY, *Episcopal Visitation of Monasteries in the Thirteenth Century*, (= CHENEY), Manchester [Eng.], Univ. Press [pref. 1931], (Pub. of the Univ. of Manchester, Historical series, 58), p. 19. This excellent work gives a good history of visitation with extensive examples and citations.

¹⁶⁰ “[...] placuit nullum quidem usquam aedificare aut constituere monasterium vel oratorii domum praeter conscientiam civitatis episcopi. Monachos vero per unamquamque civitatem aut regionem subiectos esse episcopo [...]” (TANNER, c. 4, p. 89).

¹⁶¹ CONSTABLE, p. 192. See also his note 21 on p. 206, G. ALBERIGO, *Conciliorum oecumenicorum decreta*, Centro di documentazione, Istituto per le scienze religiose, Bologna, curantibus J. ALBERIGO et al., Consultante H. JEDIN, Friburgi, Herder, 1962, p. 89; GRATIAN, *Decretum*, C. 18, q. 2, c. 10, E. FRIEDBERG ed., *Corpus iuris canonici*, I. Leipzig, 1879, p. 832, with references to other citations; T. MCLAUGHLIN, *Le très ancien droit monastique de l'Occident*, coll. Archives de la France monastique, Ligugé, Paris, 38 (1935), pp. 130-133.

between the monasteries and the dioceses, all of which continued according to the customary law."¹⁶² While Fogliasso is in substance correct, this did not prevent several statements through history which record the progression of the clear perception of bishops that monasteries were subject to their authority.¹⁶³

As early as 455 the Council of Arles made a helpful distinction between the *internal* rule, reserved to the abbot, and the *external* rule, the purview of the diocesan bishop.¹⁶⁴ But it was not until much later that this line of thinking came to be appreciated, and even though in theory the bishop had some power to act, in practice it was not until the latter part of the thirteenth century that implementation became widespread. This reform was initiated in part because for a period of time many abbots exercised control over so much land and exercised such temporal power that they were almost considered to be administering small dioceses.

The most conspicuous sign of this independence was the right of abbots to use the *pontificalia*, of which over a hundred grants were made by the papacy between the tenth and twelfth centuries. [...] These developments fostered their own reaction, however, both among bishops and within religious communities, and led to restrictions over the power and independence of abbots both inside and outside their monasteries.¹⁶⁵

The correction of abuses and exaggerations did much to weaken the authority of abbots and to strengthen the place of the rule in the practice and concept of obedience. This at a time when the papacy was itself growing in authority.

¹⁶² "Mais à Chalcedoine on ne dit pas un mot pour révoquer l'autorité dont les abbés avaient joui jusque-là, ni pour réserver à l'évêque diocésain le choix des abbés de monastères, ni pour régler les rapports administratifs entre les monastères et les diocèses: tous ces points continuèrent d'appartenir au droit coutumier" (E. FOGLIASSO, "Exemption des Religieux," (= FOGLIASSO), in *DDC*, vol. 5, col. 647). Fogliasso treats this statement of Chalcedon as a guiding principle, and not as a strict rule of law.

¹⁶³ See CHENEY, especially p. 19 ff.

¹⁶⁴ "Les décisions du concile d'Arles (455) offrent un critère permettant d'harmoniser l'autonomie des monastères avec les droits des évêques. Ses délibérations révèlent les premiers traits de la distinction entre le régime interne, réservé à l'abbé, et le régime externe, laissé à l'évêque du diocèse" (FOGLIASSO, col. 648).

¹⁶⁵ CONSTABLE, p. 195. He documents a great number of such grants.

Cheney points out several instances where the power of bishops over monasteries was extended. For example:

At the Council of Rouen (1214) the bishops were ordered to see that monasteries were properly closed; to restore ill-gotten gains; to prevent monks from living alone; to keep the numbers in religious houses at the proper level; to provide fit confessors for nuns; and to keep women out of monasteries.¹⁶⁶

It is natural that episcopal visitation would be seen as necessary to correct abuses such as those suggested here. But on other occasions, the pope, for the sake of convenience, could delegate to diocesan bishops (or to others) powers which were not given to them in the common law, and this, often not to enforce a discipline or law, but to protect religious houses from "malefactors."¹⁶⁷

The visitation waters were somewhat muddied however by a practice known as exemption.¹⁶⁸ To protect a way of life or to assist an institute in carrying out its apostolate, privileges were granted to a particular house or monastery,¹⁶⁹ or to a group of houses usually under centralized lines of authority, as in the cases of Cluny and the military orders. The institute thus would be withdrawn from the jurisdiction of the local bishop to be placed under the immediate authority of the pope alone, who would usually carry out his governance by means of

¹⁶⁶ CHENEY, p. 22. These examples are obviously by no means exhaustive.

¹⁶⁷ For examples, see CHENEY, pp. 25ff. On p. 30 he points out examples of what he calls a "mixture of powers," where episcopal authority is reinforced by papal authority.

¹⁶⁸ For an excellent summary of the history and development of exemption, see the article by FOGLIASSO, especially cols., 646 ff. The Second Vatican Council contributed much to various clarifications of the issue.

¹⁶⁹ The first instances of exemptions to particular houses occurred at Bobbio in 628, at Benevento in 714 and 741, at Fulda in 751 and at Farfa in 775. Honorius I's grant to Bobbio is quoted by FOGLIASSO, col. 649, as follows: "Petis nec igitur, ut monasterium [...] privilegia Sedis apostolicae largiremur, quatenus sub jurisdictione Sanctae nostrae [...] Ecclesiae, constitutum, nullius Ecclesiae jurisdictionibus submitatur, pro qua re piis votis faciliter (faventes) hac nostra auctoritate, id quod a tua dilectione exposcimus (exposcimus) effectui mancipari (mancipamus). Etideo omnem cujuslibet Ecclesiae sacerdotem in praedicto monasterio dicionem qualibet auctoritate ne extendere (auctoritatemve extendere) atque sua auctoritate, nisi a praeposito monasteri fuerit invitatus, missarum solemnitates celebrare omnino prohibemus (Cipolla, *Codice diplomatico del monasterio di San Columbano di Bobbio*, I, n. x, 100)."

superiors legitimately chosen from their own numbers.¹⁷⁰ By the middle ages, indeed largely because of the type of apostolate practised by the friars, almost all the organized religious institutes became attached to the papacy in some way.

One issue which captures well the tone of this development concerns the choosing of superiors. It was mentioned earlier that the *Rule* of St. Benedict, while presuming a certain autonomy, required the bishop to witness abbatial elections and to mediate difficulties with neighbours.¹⁷¹ But Gratian himself puzzled over the role of the bishop in monastic elections:

It was thus said in the council of Toledo that bishops ought to institute abbots and other [monastic] officials. The blessed Gregory and Pelagius prohibit [this], saying that an abbot should be chosen or ordained by the monks of his congregation. How, then, is so great a divergence brought into harmony?¹⁷²

The *Rule* of Benedict¹⁷³ indicated:

[...] that the abbot was to be chosen either by the entire community acting together (*omnis concors congregatio*) or by part of the community choosing with clearer counsel (*sanioze consilio*), a phrase of which the precise meaning has long been debated [...]. Over the years, however, it took on a distinct constitutional significance and became not only the general rule for all types of ecclesiastical elections but also, according to some scholars, the source of the guiding principle of modern constitutional government, since saniority gradually came to be equated with majority.¹⁷⁴

¹⁷⁰ Ibid.

¹⁷¹ See *RB 1980*, Chapter 64, p. 281.

¹⁷² CONSTABLE, p. 197. See also, GRATIAN, *Decretum*, pp. 828-31, especially d. p. C. 18, q. 2, c. 9; cf. C. 16, q. 1 and Dist. 53 and 93, c. 5. Two excellent works on this topic are by H. GRUNDMANN, "Pars quamvis parva. Zur Abtwahl nach Benedikts Regel," in *Festschrift Percy Ernst Schramm*, Wiesbaden, I (1964), pp. 238-240; and "Zur Abtwahl nach Benedikts Regel: Die 'Zweitobern' als sanior pars?" in *Zeitschrift für Kirchengeschichte*, 77 (1966), pp. 217-223.

¹⁷³ *RB 1980*, Chapter 64, p. 129

¹⁷⁴ CONSTABLE, p. 197. CONSTABLE cites J. GAUDEMET, "Unanimité et majorité (Observations sur quelques études récentes)," in *Etudes historiques à la mémoire de Noël Dider*, Paris, 1960, pp. 149-162, discussing in particular the works of P. Grossi, L. Moulin, Y. Conger, and F. Elsener; and the two articles by GRUNDMANN cited above; K. HALLINGER, "Das Wahlrecht der Benediktusregula," in *Zeitschrift für Kirchengeschichte*, 76 (1965), pp. 233-45; and K. GANZER, "Das Mehrheitsprinzip bei den kirchlichen Wahlen des Mittelalters," in *Tübinger Theolog-Quartalschrift*, 147 (1967), pp. 60-87. CONSTABLE indicates that "[...] these authors examine fully the rival claims of barbarian and Roman ('Quod omnes tangit [...]') law" (p. 197, note 57).

Constable further points out that:

The chapter of the *Rule* concerning the election of abbots was applied to all ecclesiastical elections by Gratian, who substituted *prepositus* for *abbas*.¹⁷⁵ And the classical formula *maior et sanior pars* was used in the decrees of the Fourth Lateran Council, with *vel* in place of *et*, and in the Decretals of Gregory IX.¹⁷⁶

But, in fact, it is pointed out that:

[...] the principle of episcopal control was firmly established in canon law and was regularly reaffirmed in conciliar decrees, like the canon of the council of Tribur in 833 asserting that the bishop and neighboring abbots could depose a bad abbot even against the wishes of his community, a canon that was incorporated into the collections of Burchard, Ivo, and Gratian. The powers of bishops to control the pastoral activities of monks and to supervise the observance of the rule were protected by Pseudo-Isidore, Regino of Prüm, and even Abbo of Fleury, who tended to favor the independence of monasteries.¹⁷⁷

There is no doubt that conciliar legislation, under the control of bishops, progressively eroded the autonomy of abbots, and extended episcopal supervision. While nuanced principles of cooperation and coordination were yet to be developed, it is clear that the great age of monastic independence was coming to a close.

¹⁷⁵ GRATIAN, *Decretum*, Dist. 61, c. 14, p. 232.

¹⁷⁶ CONSTABLE, p. 198. He cites *Conciliarum oecumenicorum decreta*, J. ALBERIGO, ed., a. o., 3rd ed., Bologna, 1972, p. 246; Gregory IX. *Decretales*, L. 1, t. 6, c. 42, in *Decretalium collectiones*, E. FRIEDBERG, ed., *Corpus iuris canonici*, II, Leipzig, 1879, p. 89. See also TANNER, C. 21, p. 245.

¹⁷⁷ CONSTABLE, p. 196. The First Lateran Council, c. 16, says, "[...] that monks be subject to their own bishops with all humility, and show due obedience and devoted submission to them in all things, as if to masters and shepherds of the Church of God," (TANNER, p *193). And in Fourth Lateran, "Thus if they know of the superior of a place who should certainly be removed from office, let them denounce the person to the bishop concerned so that he may see to his or her removal." (TANNER, C. 12, p. *241).

Summary

The first eremitics, or hermits, followed the promptings of Christ and the teachings of the scriptures. This unmediated obedience gave way to the practice of submitting to an elder or master, generally in a one to one relationship. Obedience was seen as the best way to overcome self-will and the flesh, and to attain purity of heart and holiness in the search for God. With the contribution of the Rule of Pachomius, the place of the superior began to emerge in a manner that would eventually dominate the understanding of the practice of obedience in religious life for centuries to come. The superior was defined as one who stood in the place of Christ, obedience was in some way mediated, but still, in practice, the rule was fundamentally subordinate to the superior. Promises eventually came to be made in writing, and prescribed formulae of profession emerged, usually based on the baptismal vows. Obedience became the principle of cohesion for a cenobitic community.

Cassian brought the doctrine of obedience to the West, stressing that the monk must leave behind all worldly attachments, subject one's will with simplicity of heart to the command of the superior, and allow obedience to teach humility rather than pride. The *Rule of the Master* accented that monks should receive difficult and even impossible commands with docility, and that they should also obey each other. This "mutual obedience" found its way into Benedict's *Rule* which became the model for "regular monasticism" in the Middle Ages. By this time, the authority of the abbot was tempered: he was elected by his fellow monks, the election was subject to review by the bishop; he was to govern according to the *Rule*; and on more important matters he had to hear the *consilium* of the monks, but did not have to follow their advice—something subsequent rules would eventually require in assorted ways.

Even though several Councils, beginning with Chalcedon in 451, stated that bishops held authority over monks, the personal power and autonomy of abbots grew. Increasingly, exemptions, privileges and grants of immunity, which often placed communities under the direct

disposition of the Holy See, impeded interference from secular and diocesan officials. Several structures emerged: bishop-abbots; over-abbots, who ruled over several monasteries; and lay-abbots, who handled the temporal administration, leaving the liturgical and spiritual concerns to priors, provosts, or rectors. A distinction came to be made between the *internal* and the *external* purviews of authority. The Carolingian Reforms addressed some of these matters, and attempted to standardize monastic life in the Latin West according to the *Rule* of Benedict. During this period it became clear that the rule superseded the authority of the abbot; his position became an office, ceremonies of consecration were introduced, and many received the right to use *pontificalia*.

The understanding of the nature of the monastic commitment also developed. Early cenobites understood that a monk would conform to the practices of the community for the length of his stay, with the nature of the required obedience defined at first by the master or abbot, then by the rule. It became more difficult to leave a community or even transfer to another one, especially after vows, both tacit and professed, became more formally recognized and structured by the Church. Bernard of Clairvaux defined a “contractual” principle which the Church has since recognized as normative: “Only that which I have promised can be demanded of me. The nature of the monastic profession defines the limit of obedience [...],” and the nature of the profession is interpreted against the stated self-understanding of the community—its rule.

The importance of Bernard’s notion of obedience became more apparent with the rise of the military orders and especially of the mendicants, in which apostolically mobile religious, no longer confined to the monastic stability of one house, but to a “province” of houses, exercised more responsibility and autonomy. But a century-old religious self-understanding and tradition is not easily dismissed or overturned. Despite the development of new structures, monastic spirituality was still dominant. This held true through the devastation and religious laxity caused by the fourteenth century disintegration of the great medieval empire, two then three claims to

the papacy, the Great Schism, and the effects of the Black Death. The Church, on the eve of reform, was ready for a new religious development and would see it with the advent of the apostolic orders. Let consideration now be given to the world of Ignatius of Loyola, founder of the largest and most influential of the apostolic orders, the Society of Jesus.

CHAPTER TWO

IGNATIUS AND THE INSTITUTE

This Chapter shall probe the life of Ignatius of Loyola. More specifically, inquiry will be made into those events and influences which prompted Ignatius and his companions to make an offering of special obedience to the pope with regard to missions, found the Society of Jesus and, consequently profess what came to be known as their "fourth vow":

All who make the profession in this Society should understand at the time, and furthermore keep in mind as long as they live, that this entire Society and the individual members who make their profession in it are campaigning for God under faithful obedience to His Holiness Pope Paul III and his successors in the Roman Pontificate. The Gospel does indeed teach us, and we know from orthodox faith and firmly hold, that all of Christ's faithful are subject to the Roman Pontiff as their head and as the Vicar of Christ. Yet for the sake of greater devotion in obedience to the Apostolic See, of greater abnegation of our own wills, and of surer direction from the Holy Spirit, we have judged it to be extremely profitable if each one of us and all who make the same profession in the future would, in addition to the ordinary bond of the three vows, be bound by a special vow to carry out, without subterfuge or excuse and at once (as far as in us lies), whatever the present and future Roman Pontiffs may order pertaining to the progress of souls and the propagation of the faith, and to go to whatsoever provinces they may choose to send us, whether they decide to send us among the Turks or any other infidels, even those who live in the regions called the Indies, or among any heretics or schismatics or any of the faithful.¹

¹ "Quicumque autem in hac Societate professionem emisierint, non solum in primis professionis suae foribus intelligant, sed quoad uixerint, memores sint, Societatem hanc uniuersam et singulos qui in ea profitentur, sub Sanctissimi Domini Nostri Pauli Papae Tertii et aliorum Romanorum Pontificum successorum eius fidei obedientia, Deo militari. Et quanuis Euangelio doceamur, et fide orthodoxa cognoscamus ac firmiter teneamus, omnes Christifideles Romano Pontifici, tanquam capiti ac Iesu Christi Vicario, subesse: ob deuotionem tamen maiorem ad obedientiam Sedis Apostolicae, et maiorem voluntatum nostrarum abnegationem, et certiozem Sancti Spiritus directionem, summopere conducere iudicamus, singulos nos et quicumque eandem in posterum professionem emisierint, ultra illud commune trium uotorum uinculum, speciali ad hoc uoto astringi, ut quicquid modernus et alii Romani Pontifices pro tempore existentes iusserint ad profectum animarum et fidei propagationem pertinens, et ad quascunq; prouincias nos mittere uoluerint; sine ulla tergiversatione aut excusatione illico, quantum in nobis fuerit (siue nos ad Turcas siue ad quoscuq; alios Infideles, etiam in partibus quas Indias uocant, siue ad quoscuq; Haereticos, Scismaticos, seu etiam ad quosuis fideles mittendos censuerint) exequi teneamur" (IULII III, *Exposcit debitum*, 21 iul. 1550, in *ConsMHSJ*, 1, pp. 377-378; A. DE ALDAMA, trans., in *The Constitutions of the Society of Jesus: The Formula of the Institute, Notes for a Commentary*, I. ECHÁNIZ, trans. of *Notas para un comentario a la Fórmula del Instituto de la Compañía de Jesús*, (= DE ALDAMA, *Formula*),

Consideration will be given to the conversion of Ignatius, his prayer experiences, the formulation of the *Spiritual Exercises*, and the unfolding of the circumstances themselves, all of which provide evidence for the proper understanding of the intentions of the founder and interpretation of this mission vow.²

Several concerns shape and influence the investigation. In *Perfectae caritatis* the Second Vatican Council states:

It is to the church's great advantage that each religious foundation has its particular spirit and function. Each must, therefore, reverence and embrace the genius and directives of its founder, its authentic traditions, the whole heritage, indeed, of the religious body.³

This call of the Council for the renewal of religious life exhorts each religious institute to examine and to understand its history and its roots, thus better to protect the specific contribution particular to its spirit and function. The Code of Canon Law, which "could be understood as a great effort to translate [...] conciliar doctrine and ecclesiology into *canonical* language,"⁴ expresses the Council's desire in the following words:

Rome, *CIS*, 1981, St. Louis, *IJS*, 1990, pp. 7 & 9).

² The bibliography of works on the *Spiritual Exercises* is vast. The best listing of works in English can be found in P. BEGHEYN and K. BOGART, "A Bibliography on St. Ignatius's *Spiritual Exercises*," (= BEGHEYN, *Biblio.*), in *SSJ*, 23-3 (May 1991), vii, 71 p. Their section 1, pp. 1-2, lists further bibliographies on Ignatius, the Society, and the *Exercises*. The original text can be found in the *MI*, *SpExMHSJ*, vols. I. & II. An excellent new translation of the *Spiritual Exercises* with extensive notes, commentary and additional bibliography is by G. GANSS, *The Spiritual Exercises of Saint Ignatius*, (= GANSS, *SpEx.*), St. Louis, *IJS*, 1992, xi, 232 p. References to the text, unless otherwise indicated shall be to paragraph rather than page numbers in the edition, L. J. PUIII., *The Spiritual Exercises of St Ignatius: Based on Studies in the Language of the Autograph*, (= *SpEx*, or the *Exercises*), Chicago, Loyola Univ. Press, 1951, xiii, 216 p.

³ *Perfectae caritatis*, 2b, in AAS, 58 (1966), pp. 702-712; also in N. TANNER, ed., *Decrees of the Ecumenical Councils*, (= TANNER), London, Sheed and Ward; and Wash., DC, Georgetown Univ. Press, 1990, p. 940.

⁴ JOHN PAUL II, Apostolic Constitution, *Sacrae disciplinae leges*, in *Codex iuris canonici auctoritate Pauli PP. II promulgatus*, Città del Vaticano, Libreria editrice Vaticana, 1983, U. S. version of English-language trans.: *Code of Canon Law*, Latin-English edition, trans. prepared under the auspices of the *CLSA*, Wash., DC, *CLSA*, 1983, *CIC 83*, p. xiv. The Latin, p. xi, reads: "concupi postest veluti magnus nisus transferendi in sermonem canonisticum [...] doctrinam, ecclesiologiam scilicet conciliarem. Quod si fieri nequit, ut imago Ecclesiae per doctrinam Concilii descripta perfecte in linguam canonisticam convertatur, nihilominus ad hanc ipsam imaginem semper Codex est referendus tamquam ad primum exemplum, cuius lineamenta in se, quantum fieri potest, suapte natura exprimere debet."

The intention of the founders and their determination concerning the nature, purpose, spirit and character of the institute which have been ratified by competent ecclesiastical authority as well as its wholesome traditions, all of which constitute the patrimony of the institute itself, are to be observed faithfully by all.⁵

The patrimony of each religious institute is considered to be so important to the life of the Church that the universal law itself protects it in this passage:

For individual institutes there is acknowledged a rightful autonomy of life, especially of governance, by which they enjoy their own discipline in the Church and have the power to preserve their own patrimony intact as mentioned in can. 578.⁶

To preserve the patrimony of an institute while undertaking renewal requires a good understanding of the influences working in the life of the founder and the circumstances which led to the establishment of the institute. It especially entails a critical examination of the expression which the institute is given in its founding documents, approved by the Church, and understood as far as possible in the historical context, for it is according to these documents of "proper law" that the members make their profession of the evangelical councils and of any ancillary vows particular to an institute.⁷

One must, therefore, be aware of the fundamental "rules for interpretation" of a juridical text. The Code of Canon Law cites the following general principle:

Ecclesiastical laws are to be understood in accord with the proper meaning of the words considered in their text and context. If the meaning remains doubtful and obscure, recourse is to be taken to parallel passages, if such

⁵ "Fundatorum mens atque proposita a competenti auctoritate ecclesiastica sancta circa naturam, finem, spiritum et indolem instituti, necnon eius sanae traditiones, quae omnia patrimonium eiusdem instituti constituunt, ab omnibus fideliter servanda sunt" (*CIC 83, c. 578*).

⁶ "Singulis institutis iusta autonomia vitae, praesertim regiminis, agnoscitur, qua gaudeant in Ecclesia propria disciplina atque integrum servare valeant suum patrimonium, de quo in can. 578" (*CIC 83, c. 586 §1*).

⁷ This recalls the principle first expressed by Bernard of Clairvaux, referred to in the previous Chapter. An example of a present day application of this principle can be seen in the sample vow formula found in Appendix II, where the novendi express their vows and understand them, "[...] according to the manner of living contained in the Apostolic Letters of the Society of Jesus and its Constitutions" and "[...] in accordance with the same Apostolic Letters and Constitutions."

exist, to the purpose and the circumstances of the law, and to the mind of the legislator.⁸

Two additional norms are: keep in view the practice of the Roman Curia; and a higher law takes precedence over a lower law. The universal law of the Church and the principles for interpreting it apply equally to an analysis of the proper or particular law of an institute, except where otherwise expressly provided for by the same universal law.⁹

Ladislav Örsy offers further principles when speaking of the “qualities of the interpreter”:

1. The interpreters should be aware that their interpretation is a historical event in two ways: they describe the law at a specific point of evolution, and their capacity to know is at a specific point of development.
2. The broader the horizon of the interpreters, the closer their interpretation is to truth.
3. The interpreters who can approach the law with more sophisticated categories are more likely to find the right meaning.¹⁰

⁸ “Leges ecclesiasticae intellegendae sunt secundum propriam verborum significationem in textu et contextu consideratam; quae si dubia et obscura manserit, ad locos parallelos, si qui sint, ad legis finem ac circumstantias et ad mentem legislatoris est recurrendum” (CIC 83, c. 17).

⁹ Two principles found in *De Regulis Iuris* of Boniface VIII are worthy of note here: *In toto partem non est dubium contineri* (Gaius, *D* 50.17.113; *W* 4: 963); and, *Plus semper in se continet quod est minus* (Paulus, *D* 50.17.110; *W* 4.963). A translation offered by J. P. McINTYRE, in, “The Brocardics/ Regulae Juris/ Legal Maxims, Taken from the Liber Sextus,” Class Notes, for Private Circulation Only, St. Paul Univ., Ottawa, 1992, used by permission, reads: “It is perfectly clear that a part is contained within the whole” (p. 10); and, “‘More’ always contains in itself what is less.” (p. 4). U. VALERO, general counsellor, procurator-general and often vicar-general of the Society, responsible for preparing the revision of the Society’s law which was undertaken at the Thirty-Fourth General Congregation, 1995, offers this helpful explanation in “Reflections on the Meaning and Significance of Law in the Life of the Society,” (= VALERO, *Reflections*), Rome, 1992, a private paper used with permission, p. 1: “When applied to the Society, the term ‘law’ refers to the ensemble of norms which define the Society’s end, determine its structure, and establish the means for the attainment of its end. Among these norms, some, emanating from the legislative organs of the Church, are common to all religious institutes; these constitute the Church’s common or, as the new Code of Canon Law says, universal law for all institutes [see CIC 83 c. 596 §1]. There are other norms emanating from the general legislative power of the Church or of the Society itself which are special to the Society. These are the norms which make up ‘our special law.’ Those emanating from the Society’s own legislative power remain subject to this power and may be altered by it, while those emanating from the Church’s legislative bodies, even if pertaining only to the Society, remain under the power of those organisms and can be changed only by them.” See also c. 583: “Immutationes in institutis vitae consecratae ea afficientes, quae a Sede Apostolica approbata fuerunt, absque eiusdem licentia fieri nequeunt”; and c. 587 §2: “Codex huiusmodi a competenti auctoritate Ecclesiae approbatur et tantummodo cum eiusdem consensu mutari potest.”

¹⁰ See L. ÖRSY, *Theology and Canon Law: New Horizons for Legislation and Interpretation*, MIN, The Liturgical

E. McDonough suggests that one must also be aware of some limitations of Church law that can affect the interpretation of them.

To name only a few, law is limited by operating presumptions, by different literary forms, by various levels of documentation, by the context of its formulation, by its external nature and especially by human misuse.¹¹

McDonough adds that presumptions of law are often not true. For instance, people are presumed to know the law, but obviously this is not so.¹² While the Code is available in various languages, there is a difference between reading the law and actually “knowing” what it means. For instance, it would not be a surprise if someone were to miss the different nuances among canons that may be written as “exhortatory,” “theological,” or as simple “norms of action.”¹³

An historical examination of the motivation and intention of Ignatius and his companions regarding “the nature, purpose, spirit and character”¹⁴ of the Society must begin with Ignatius himself. J. de Guibert helps to organize this undertaking by suggesting that there are five distinct stages in the development of Ignatius’ interior life:

First, the period of his conversion in 1521; second, that from March, 1522, to February, 1524, which was spent at Montserrat, Manresa and Jerusalem; third, the time of his studies from 1525 until he left Paris for Spain in April, 1535; fourth, the years of his evangelical and apostolic life in upper

Press, Collegeville, 1992, pp. 50–51. See also his, “Rules for Interpretation,” on pp. 77–82; and his Chapter 9, “Models of Law and Their Impact on Interpretation,” pp. 139–157.

¹¹ E. McDONOUGH, *Religious in the 1983 Code: New Approaches to the New Law*, Chicago, Franciscan Herald Press, 1985, pp. 24 ff.

¹² *CIC 83*, c. 1584 states: “Praesumptio est rei incertae probabilis coniectura; eaque alia est iuris, quae ab ipsa lege statuitur; alia hominis, quae a iudice conicitur.” *C. 15* states: §1. “Ignorantia vel error circa leges irritantes vel inhabilitantes earundem effectum non impediunt, nisi aliud expresse statuatur. §2. Ignorantia vel error circa legem aut poenam aut circa factum proprium aut circa factum alienum notorium non praesumitur; circa factum alienum notorium non praesumitur, circa factum alienum non notorium praesumitur, donec contrarium probetur.” *C. 1096* §2 states: “Haec ignorantia post pubertatem non praesumitur.”

¹³ F. MORRISSEY, “The Canonical Significance of Papal and Curial Pronouncements,” *CLSA Proceedings*, Hartford, CT, *CLSA*, 1974, cf. esp., pp. 1 and 15–16. See also this article updated in: *Papal and Curial Pronouncements: Their Canonical Significance in Light of the 1983 Code of Canon Law*, Ottawa, Faculty of Canon Law, St. Paul Univ., 1992, 46 p.

¹⁴ Cf. *CIC 83*, c. 578, in note 5 above.

Italy and at Rome until the foundation of the Society through its approval by Paul III on September 27, 1540; fifth and last, the period from 1540 until his death in 1556.¹⁵

This schema will be used freely here to consider the events of Ignatius' life up to the final revision of the founding document of the Society which was promulgated in 1550.

A. The Life of Ignatius of Loyola

1. The Early Years

The youngest son of thirteen children, Iñigo López de Loyola was born in 1491¹⁶ to Beltran de Loyola and Maria Sanches in the castle of Loyola.¹⁷ He lived through exciting moments in history. Within a year of his birth, Columbus found himself in the New World, and

¹⁵ J. DE GUIBERT, *The Jesuits: Their Spiritual Doctrine and Practice*, (= DE GUIBERT), W. J. YOUNG, trans., G. GANSS, ed., St. Louis, *IJS*, 1964, second printing 1972, p. 22. J. G. GERHARTZ, "The Fourth Vow in Respect of Missions and its Influence on the Constitutions: An Historico-Canonical Inquiry," (= GERHARTZ, "The Fourth Vow"), a private paper, to be published by the Secretariate on Ignatian Spirituality, Rome (formerly *CIS*), [nd, but probably 1992], used with permission of the author and the *SIS*, p. 2, proposes three stages, "[...] which we may schematically characterize as follows: from 1521 to 1534, Loyola to Montmartre, with Jerusalem as the ideal; from 1534 to 1537, Montmartre to La Storta outside Rome, with the ideal wavering between Jerusalem and Rome; and from 1538 on, with the decision having been made for Rome." Several good works are available on the spiritual life of Ignatius and are listed in the bibliography. They include those by A. BROU, J. DANIFLOU, J. DE GUIBERT, A. ELLARD, H. V. GILL, J. LEWIS, P. LIPPERT, E. ALLISON PEERS, and H. RAINER. Other excellent works include "Alianza bíblica y regla religiosa (Estudio histórico-salvífico de las Constituciones de la Compañía de Jesús)," in *Ciencia y Fe*, Buenos Aires, 21 (1965), pp. 3-36; J. M. GRANERO *San Ignacio de Loyola: panoramas de su vida*, (= GRANERO), Madrid, Editorial Razon y Fe, 1967, xxxi, 554 p.; and A. IPARRAGUIRRE, *Orientaciones bibliográficas sobre san Ignacio de Loyola*, 2nd ed. rev., Rome, *IHSJ*, 1965. See also BEGHEYN, *Biblio*.

¹⁶ While Polanco indicates that Ignatius was born in 1495 (*PolChron*, I, pp. 9ff.), P. DUDON, (*St. Ignatius*, p. 17), deduces the year to have been 1493, a date which corresponds with Polanco's statement that Ignatius was sixty-three years old when he died in 1556. P. LETURIA, however (in Chapter 3 of vol. 1, of *Estudios Ignacianos*), convincingly argues the date as 1491. W. W. MEISSNER, *The Psychology of a Saint: Ignatius of Loyola*, (= MEISSNER), New Haven and London, Yale Univ. Press, 1992, p. 426, note 4, agrees and draws attention to a legal deed witnessed by Ignatius in 1505. Since Castilian and Basque law required a male to be fourteen years of age to act as a judicial witness, it does seem that 1491 is the probable date for the birth of Iñigo, and it is this date which was used by the Society to mark the celebration of his five hundredth birthday.

¹⁷ He was baptized with the name Eneco (Basque = Iñigo). A good source on the family history and early life of Ignatius can be found in C. DALMASES, *Ignatius of Loyola: Founder of the Jesuits*, J. AIXALÀ, trans., (= DALMASIS), St. Louis, *IJS*, 1985. In note 2, p. 3, the same author points out the history of the name Iñigo, and indicates that the change of name to Ignacio or Ignatius was gradual. "It can be said that until 1545, the form Iñigo was predominant in letters and familiar conversation, while Ignacio or the Latin Ignatius predominated in official documents. After 1545 Ignacio and Ignatius were the forms most frequently used. On this, see G. M. VERD, S.J., *AHSJ*, 45 (1976), 95-128; Hugo RAINER, S.J., *Ignatius von Loyola als Mensch und Theologe* (Freiburg, 1964), pp. 31-42." In general the name Ignatius will be used when referring to the events of his life after the reception of his Master's degree in 1534.

initiated a period of exploration, colonization and global trade that changed the face of the civilized world. In the same year Granada, the last of the Moorish strongholds fell thereby increasing pressure from the Moors on the Eastern borders of Europe; the Borgia, Alexander VI, ascended the papal throne (Alexander's grandson, Francis Borgia, would become the third superior general of the Society of Jesus); and Luther, now nine years old, was a schoolboy at Mansfeld. "Charles V was absorbed by the Turkish question, leaving a vacuum for the flourishing of the Reformation. From 1492 on, the Italian wars had a devastating effect on the Italian peninsula and on the Church [... which] was badly in need of reform from top to bottom."¹⁸

The oldest of Iñigo's brothers, Juan Pérez, joined the second voyage of Columbus, and the next oldest, Martín García, led about fifty men to the defense of Pamplona in 1521. Another brother ventured as an explorer to die in what is now known as Central America. Two others died in the Naples campaign of 1498, and yet another died in Hungary fighting the Turks in 1542. The confrontation between Christianity and Islam spanned Iñigo's entire lifetime, ebbing only with the Battle of Lepanto in 1556.¹⁹ At around the age of puberty Iñigo himself was received to be trained as a courtier into the household at Arévalo of Juan Velázquez de Cuéllar, chief treasurer of King Ferdinand of Aragon. After the death of Velázquez in 1517, he became a soldier under Don Antonio Marique de Lara, duke of Nájera and viceroy of Navarre.²⁰

¹⁸ MEISSNER, p. 12.

¹⁹ Ibid. See also J. TETLOW, *Ignatius Loyola: Spiritual Exercises*, (= TETLOW), New York, The Crossroads Publishing Co., 1992, p. 18; T. CLANCY, *An Introduction to Jesuit Life*, (= CLANCY), St. Louis, IJS, 1976, p. 24., and P. LETURIA, *Iñigo de Loyola*, A. J. OWEN, trans., (= LETURIA), Syracuse, 1949, p. 31.

²⁰ J. O'MALLEY, *The First Jesuits*, (= O'MALLEY, *The First Jesuits*), Cambridge & London, Harvard Univ. Press, 1993, p. 23. J. FUTRELL, *Making an Apostolic Community of Love: The Role of the Superior According to St. Ignatius of Loyola*, (= FUTRELL), St. Louis, IJS, 1970, p. 7, note 9, points out that, "Nobility was transmitted by blood to *los hijos de los bien nacidos*. The term *fijodalgo* from *filius alicui* (*hijo de alguién*) became *hidalgo* in Castile during the thirteenth century. The duty of the noble was to fight for his temporal lord or king, but not as a mere soldier. Rather, he went off to battle magnificently on horseback (*caballaris*) and so was called a *caballero*. See A. GARCÍA-GALLO, *Manual de historia del derecho español*, 2nd ed., 2 vols., Madrid, 1964, vol. 1, p. 576."

From his early childhood Iñigo was imbued with an attitude of chivalry,²¹ and honour for king, country and the Catholic faith. The men of Loyola were,

[...] rich, attractive, and strong, and in a culture that placed high value on masculinity and sexual prowess, they were proud and vain enough to leave few of these cultural expectations unfulfilled. The life of the Loyolas was a rich amalgam of deep religious tradition, sincere piety, burning passion and lust, fierce pride, and an attitude of aristocracy and nobility.²²

In Ignatius' own words, "Up to his twenty-sixth year he was a man given over to worldly vanities, and having a vain and overpowering desire to gain renown, he found a special delight in the exercise of arms."²³ As noted by F. M. Oppenheim,

Youthful *caballero* Iñigo had not only been 'much addicted to gambling and dissolute in his dealings with women, contentious and keen about using his sword,' but also had been arrested for a 'quite enormous' crime (*muy enorme*) on February 20, 1515, after he, as ring-leader, with his dissolute priest-brother, and others of his clan resorted—not without provocation—to violence against the parish clergy of Azpeitia 'at night, of set purpose, and treacherously, by means of an ambush,' according to extant legal records of the event.²⁴

This was not be the last time Iñigo would be "hailed" before the law.²⁵

²¹ J. WICKHAM's "The Worldly Ideal of Iñigo Loyola," in *Thought*, 29, 113 (June, 1954), pp. 209-236, is a well documented and excellent treatment of these matters. For an acceptable account of the ideal of chivalry, see B. CASTIGLIONE, *Book of the Cortier*, as suggested by *NCatEnc*, s.v. "Castiglione." See also L. J. DALRY in *WL*, 89, (1960), pp. 231-239.

²² MEISSNER, p. 14.

²³ J. TYLEND, *A Pilgrim's Journey: The Autobiography of Ignatius of Loyola*, (= *Autobiography*), Wilmington, Delaware, Michael Glazier Inc., 1985, no. 1, p. 7.

²⁴ F. M. OPPENHEIM p. 423, note 6, of an unpublished paper presently entitled, "None Dare Call it 'Disobedience'—Not Even the Author." Polanco describes Ignatius as follows: "Although very much attached to the faith, he did not live in keeping with his belief, or guard himself from sin: he was particularly careless about gambling, affairs with women, and duelling" (*PolChron*, I, 10, as quoted in P. DUDON, *St. Ignatius*, p. 18). Cf. J. BRODERICK, *Saint Ignatius Loyola: the Pilgrim Years, 1491-1538*, New York, Farrar, 1956, pp. 45-46.

²⁵ DALMASES, p. 95, indicates that in a 1545 letter to King John of Portugal, Ignatius mentions eight of these processes, and three of them were instituted at Alcalá. See PADBERG, "Realistic Reverence," in *SSJ*, 25-3, (1993), pp. 13-18, for a good account of Ignatius' tenacity in demanding justice against highly placed officials of the Holy See when the good name of the companions was at risk during the founding years.

Ignatius' notions of social order and authority were shaped by his experience as a member of the "seignorial class of Guipúzcoa"²⁶ into which he was born. In fact, J. Futrell points out how, later in his life, "In detailing the various functions and duties of the superior, Ignatius reflected the cultural and linguistic patterns of his own time."²⁷ Futrell goes so far as to say that, "the idea of authority expressed by Ignatius in the Constitutions is Castilian."²⁸

2. Iñigo's Conversion

On 20 May 1521, at twenty-six years of age,²⁹ while Iñigo was leading a defense against the French on the walls of Pamplona, "a cannonball hit him in a leg, shattering it completely, and since the ball passed between both legs the other one was likewise severely wounded."³⁰

²⁶ FUTRELL, p. 56.

²⁷ FUTRELL, p. 56 considers: Ignatius' notion of the superior; his use of the Castilian term *perlado*, then later *praepositus* to refer to superiors; his legislation on the general; the general's authority; the "Company's" authority over the general; and several structures in the Constitutions such as a General Congregation, and sees in all of this the influence of the Castilian theory of the authority of the king (*ibid.*, p. 65), as found in *Las Siete Partidas* (D. J. MUÑO MARTÍNEZ, 2 vols., Valladolid, 1875, vol. 2, p. 172). "The first codification of Castilian law was the *Siete Partidas*, begun by King Alfonso X (1252-1284), in 1256, and after a long period of development, officially proclaimed by Alfonso XI in *Ordenamiento de Alcalá* of 1348. After circulating for many years in manuscript, *Las Siete Partidas* were first printed at Seville in 1491. They remained the basic principles of law until the legislation of Charles V. The *Partidas* present a system of law which is entirely theocentric. They sum up and give expression to a world view which reflected the conceptions that men had of authority and obedience and the relation of men in society to God. Although Ignatius undoubtedly never read the *Partidas*, his mentality was formed in Castile according to their principles and, as will appear in later Chapters, he echoed these in the Constitutions" (p. 53, note 47). See also the excellent introduction by P. GÓMEZ DE LA SERNA, "El código de D. Alfonso el Sabio concide con el nombre de las Siete partidas—Introducción histórica," vol. 2, pp. xlvi-1.

²⁸ FUTRELL, p. 64. In his Chapter 3, p. 56 ff., Futrell, using primarily the *Manual de historia del derecho español* by A. GARCÍA-GALLO, provides a well researched account of influences on the development of Spanish law: from tribal laws of custom; through the Roman occupation and the growth of Christianity; the Visigothic invasions, and their contribution of the *Liber iudiciorum* or *Lex visigothorum*; the Moorish occupation and the influence of Arabian philosophy which helped to elevate jurisprudence to a science; and the increasing influence of Church law on the development of secular laws. He points out that, "During this long period of evolution of law in the rest of Spain, the Law of Custom continued to prevail in the Basque country [...] until the fourteenth century, when laws finally began to be codified into writing" (pp. 57-58).

²⁹ In the *Autobiography*, no. 1, Ignatius indicates that he was twenty-six at the time of this occurrence, however, he was in his thirtieth year according to P. LETURIA, *Estudios ignacianos*, I. IPARRAGUIRRE, trans., Rome, 1956, vol. I, Chapter 3.

³⁰ *Autobiography*, no. 1, p. 9.

After he had his wounds set on the battlefield and endured the painful journey to his own country where they had to be reset, Iñigo was so ill that “the doctors agreed if his condition did not improve by midnight he could be given up as dead.”³¹ What happened on this night of 28 June 1521, the vigil of Saints Peter and Paul, is best described by Ignatius himself: “Now, the sick man was devoted to Saint Peter, and our Lord thus desired that his recovery begin that very midnight. His improvement progressed so well that after a few days he was pronounced to be out of danger of death.”³² J. Padberg points out that,

Of course, that bare recital later took on a certain amount of embroidery in which St. Peter supposedly appeared to Ignatius and personally restored him to health. This story got greater currency in the Spanish version of Ribadaneira’s life of Ignatius, where the author reported, ‘And thus it is understood that this glorious apostle appeared to him in that same night at his greatest necessity.’³³

Padberg points out that the “pious” might see this incident as Ignatius’ first contact with the papacy.

During his subsequent convalescence he would have read tales of romance and chivalry had they been available, but accessible to him were only the four volume *Life of Christ* by the German Carthusian, Ludolph of Saxony, and a collection of saintly biographies called the *Golden Legend*, or *Flos Sanctorum*, by Jacobo da Voragine, which also included a life of Christ and His Mother, Mary.³⁴ As he read, he imagined himself a chivalric hero performing the same deeds as the saintly champions, and perhaps even better than they. He was still inclined, however, to return to his former ways, even with the permanent limp left to him by his injuries. As he whiled away the hours with such musings, he discovered that his worldly thoughts left him dry and

³¹ DALMASES, p. 41.

³² *Autobiography*, no. 3., p. 10.

³³ J. PADBERG, “Ignatius, the Popes, and Realistic Reverence,” in *SSJ*, 25–3 (May 1993), p. 9.

³⁴ See LETURIA, *Iñigo*, Chapter 4 and his Appendix I. CLANCY mentions in Chapter II, n. 14 that SCHURHAMMER’S, *Xavier*, vol. 1, p. 490 n. says that *Flos Sanctorum* was one of the first books read during meals in Rome in the early days of the Society. See also H. RAHNER, *Ignatius Loyola*, p. 23.

agitated, whereas the others filled him with peace and comfort. “[...] and little by little he came to perceive the different spirits that were moving him; one coming from the devil, the other coming from God.”³⁵ These episodes of reflection on his inner experience would eventually mature into his distinctive approach to the discernment of spirits, the structure and rules for which he focused in the *Spiritual Exercises* and later juridically protected in several key features of the *Constitutions*.³⁶ On his bed of recovery he determined that, “his greatest desire, after regaining his health, was to go to Jerusalem, as previously stated, and to observe the fasts and to practice the discipline as any generous soul on fire with God is accustomed to do.”³⁷ Iñigo held faithful to this resolution for many years, until he gave it up in favour of disposing his life to the service of the universal Church at the feet of its representative, the pope.

Having decided to live out the fruits of his conversion, as soon as he was well enough to travel he set out for Montserrat where after a three day general confession he stood an all-night vigil of arms before the famous Black Madonna, “[...] to clothe himself there with the arms of his new spiritual warfare, in the fashion of young knights who entered upon the service of earthly warfare.”³⁸ There, he hung up his sword and traded his garments for a pilgrim’s tunic. After this highly symbolic turning point in his life, he made his way to Manresa, a town on the river Cardener, where he intended to spend a few days making some spiritual notes. Whether it was

³⁵ *Autobiography*, no. 8., p. 15.

³⁶ See FUTRELL., p. 106, note 1, for a selected bibliography on the “Rules for the Discernment of Spirits.” See also BEGHEYN, *Biblio.*, no. 23, pp. 50–56, for a bibliography on *Rules for the Discernment of Spirits*. FUTRELL’s Chapter 5, 106 ff., espec. his section entitled, *The Vocabulary of Discernment*, is an excellent presentation of notions and elements necessary for an understanding of the process of discernment, such as *parecer*, *sentiendo*, *juzgar*, and the key but difficult to translate *sentir* or *sentido*. See also G. GANSS, “St Ignatius’ ‘Rules for Thinking With the Church,’ ” in *SSJ*, 7-1 (Jan. 1975), pp. 12 ff. Manifestation of conscience, representation, the principles of consultation, the “Rules for Thinking With the Church,” the very intent and purpose of the fourth vow itself, “[...] for surer direction of the Holy Spirit [...],” and several other features of the ordinary government of the Society (which shall be discussed in the next Chapter) are directly based on the insights Ignatius gleaned from his experience of the discernment of spirits.

³⁷ *Autobiography*, no. 9., p. 15.

³⁸ Iñigo’s vigil is very similar to an investiture ceremony prescribed in the “[...] Seven Laws (*Siete Partidas*) of King Alfonso X, the Wise, to which Iñigo had been exposed by his reading of the books of chivalry” (DALMASES, p. 53).

because of the outbreak of a plague in the area, or because he missed the sailing season thus impeding his journey to Jerusalem, or for some other reason, he actually spent some eleven months at Manresa.

3. Manresa

C. Dalmases speaks about three periods of interior evolution or development experienced by Iñigo during his stay in Manresa. The first was marked by great tranquillity and joy in which he devoted seven hours a day to prayer. The second was a time of deep struggle, doubts and scruples, and even inclinations to suicide. During the third however, he received "marvellous divine illuminations and composed the *Spiritual Exercises*."³⁹ In fact, J. Nadal goes so far as to say, "that is where Ignatius understood his goal, the aim he should pursue in his every undertaking, and that is now the aim of the Society."⁴⁰ Ignatius would later refer to this period as his "primitive church," and it is clear that the *Exercises*, like most of his significant decisions and writings, were based on his direct and personal experience.⁴¹

Of the many spiritual experiences of Iñigo, it is pertinent to recall one in particular, the illumination beside the Cardoner. In his own words,

He cannot expound in detail what he then understood, for they were many things, but he can state that he received such a lucidity in his understanding that during the course of his entire life—now having passed his sixty-second year—if he were to gather all the helps he received from God and everything he

³⁹ DALMASES, pp. 57 ff. Diego Laínez also indicates that it was at Manresa that the substance of the *Spiritual Exercises* was written, (*FN*, vol. 1, p. 82). DALMASES (pp. 65-66) indicates that at Manresa Ignatius probably composed the substance of the principal meditations of the four weeks, linked them together, wrote two examinations of conscience, and drafted the rules on discernment for the first week. Of course, the *Exercises* would be subject to revisions by Ignatius until his death.

⁴⁰ *M. Nadal*, 5: 40. Nadal is referring specifically to the content of two exercises mentioned by DE GUMBERT, which shall be seen shortly: the Call of the King, and the Two Standards. See the *SpEx.*, [95-98]; [136-148]; and [313-327].

⁴¹ DALMASES, p. 55, quoting Laínez, in *FN*, I, 140. G. PAPASOGLI, in *Saint Ignatius of Loyola*, New York, Society of St. Paul, 1957, p. 63, also indicates that "As a consequence of these experiences Iñigo composed the first draft of his *Spiritual Exercises*."

knew, and add them together, he does not think they would add up to all he received on that one occasion.⁴²

Dalmases reflects that,

[...] in his Cardoner enlightenment Iñigo saw the new course his life was to take. He was no longer to be the solitary pilgrim who in prayer and penance endeavoured to imitate the example of the saints, but from now onward he would devote himself to labouring for the good of the neighbour, to seeking companions who would join him in this enterprise and with whom he would form an apostolic body. [...] In this sense it is correct to relate the foundation of the Society of Jesus with the great illumination of Manresa.⁴³

No doubt as a result of the fruits of his prayer, and of his fertile imagination which had a distinctive influence on his prayer style, Ignatius wanted to imitate Christ in all things, even to walk “[...] literally in the footsteps of Jesus and the Apostles, helping souls in the Holy Land, and in the very villages and towns where the Lord had taught.”⁴⁴ So, while at Manresa, Iñigo began to experience the apostolate. He cared for the sick in a local hospital, engaged in spiritual conversations,⁴⁵ and even taught catechism to children.

Polanco recalls that it was in Manresa that the Lord taught Iñigo the meditations which are now called the *Spiritual Exercises*, and as they had helped bring about a great transformation in his own soul, so he desired to use them to help others.⁴⁶ De Guibert says,

⁴² *Autobiography*, no. 30., p. 39.

⁴³ DALMASSES, p. 63. See also DE GUIBERT, pp. 27 ff., and especially pp. 44 ff., for a good review of Ignatius' mysticism; and H. D. EGAN, *Ignatius Loyola: the Mystic*, (= EGAN), Wilmington, Delaware, Michael Glazier, 1987, p. 42 ff.

⁴⁴ DE ALDAMA, *Formula*, p. 26; see also the *Autobiography*, no. 45.

⁴⁵ CLANCY, p. 36, calls spiritual conversations *the* Ignatian apostolate.

⁴⁶ *PolSum*, no. 24, in *FN*, I, p. 163. Cf. DALMASSES, p. 65. O'MALLEY, *The First Jesuits*, pp. 46–47, points out that this spiritual impulse of Iñigo resulted in several innovations. The *Exercises* was the first effective “codification” of “the practice of spending a period of time alone in contemplation,” and “in effect created the institution known as the ‘retreat.’” This not only put into the hands of the first Jesuits “an instrument of ministry that was new and peculiar to them,” but highlighted the relationship between the one engaged in them and the one assisting, so that “[...] ‘spiritual’ direction, or counseling, began to emerge with a new prominence in Catholicism as a formal and continuing relationship between the two persons involved.” See also p. 387, notes 84–86. While more will be said about him later, Juan Alfonso de Polanco became the procurator general and secretary of the Society, and was one of Ignatius' closest collaborators.

This was a period of capital importance in his spiritual life, since it transformed the converted soldier, still very plain and coarse even in his desires for an outstanding service of God, into a truly interior man and a master already expert in training and directing souls. The period also extended his view beyond penitential prowess to take in perspectives of apostolic service.⁴⁷

Later, in the *Constitutions*, Ignatius would write that Christ sends us, “[...] in order to be good and faithful sowers in the Lord’s field and to preach his divine word” endeavouring “to help and dispose souls to gain their ultimate end from the hand of God our Creator and Lord.”⁴⁸ After his enlightenments and experiences in Manresa, all subsequent decisions made by Iñigo were coloured by this practical but fundamental commitment to apostolic service.

4. The Spiritual Exercises

The Spiritual Exercises are the essential backdrop not only to any understanding of Ignatius, but also to the *Constitutions*, the Society itself, and certainly to a good understanding of the mission vow. Every Jesuit follows the full course of the *Exercises* at least once as a novice, and usually again later in life before final incorporation into the Society.⁴⁹ While reference may be made to the “book,” of the *Exercises*, they were never intended to be “read” or even put into the hands of the one engaged in “praying” them. They were designed as a set of meditations, contemplations, guides and materials for the one assisting the “exercitant,” who is presumed to enter the experience with generosity and good will. Ignatius assumes “[...] explicitly that God will communicate himself profoundly to the devout person seeking God’s will.”⁵⁰

⁴⁷ DE GUIBERT, p. 27.

⁴⁸ *The Constitutions of the Society of Jesus*, G. GANSS, trans., intro., & commentary, (= GANSS, *Cons.*), IJS, St. Louis, 1970, [30], [109]; [156]. Cf. DE ALDAMA, *Formula*, p. 26, and his notes 6 and 7.

⁴⁹ The second experience of the *Exercises* for a Jesuit usually occur during the “third year of probation,” or the final year of formation in the Society, called “tertianship,” followed shortly thereafter by final vows.

⁵⁰ EGAN, p. 84. See also *SpEx*, [5, 6, 15, 16, 20, etc.].

While at first glance the *Exercises* may appear to be mechanical, nothing could be further from the truth. "The *Exercises* are precisely a school for the training of desire [...],"⁵¹ in which "the reasons of the heart have primacy."⁵² The extended, intimate time spent with Christ, especially in the contemplations on the mysteries of His life, engage the whole person. It is anticipated that throughout the experience of prayer consolations and desolations one will be moved "by great feeling," and even to tears.⁵³

The purpose of the *Exercises* is stated in the first paragraph as:

[...] preparing and disposing the soul to rid itself of all inordinate attachment, and, after their removal, of seeking and finding the will of God in the disposition of our life for the salvation of our soul.⁵⁴

Historically there have been two identifiable positions regarding the goal of the *Exercises*. The first holds that the aim is "union with God."⁵⁵ The other says that Ignatius meant them as an aid in the "election," or choice of a state of life.⁵⁶ R. Schmitt proposes "[...] the modern category of 'encounter' with God as the most adequate answer to the alternatives of union with

⁵¹ FUTRELL, p. 96. For a good presentation on the place of "desire" in Jesuit documents, see, G. I. CARLSON, "A Faith Lived Out of Doors": Ongoing Formation of Jesuits Today," in *SSJ*, 16-4, (September, 1984), pp. 6 ff.; 15 ff.

⁵² O'MALLEY, *The First Jesuits*, p. 42.

⁵³ *SpEx.*, [234, 55, 87, 195]. For Ignatius' descriptions of "consolation," *SpEx.*, [316], and "desolation," *SpEx.*, [317]. See also O'MALLEY, *The First Jesuits*, p. 41; GANSS, *SpEx.*, notes on the "Rules for the Discernment of Spirits," p. 189 ff; and FUTRELL'S Chapter 5, cited above, for a discussion of *sentido*.

⁵⁴ *SpEx.*, [1].

⁵⁵ See W. PETERS, *The Spiritual Exercises of St. Ignatius: Exposition and Interpretation*, 2nd ed., Rome, CIS, 1978; and his, "The Hidden Force Behind the Spiritual Exercises," in *Fordham Studies*, 1964, pp. 5-8; and L. PEETERS, *An Ignatian Approach to Divine Union*, H. L. BROZOWSKI, trans., Milwaukee, Bruce Pub. Co., 1956.

⁵⁶ See L. DE GRANDMAISON, "Les 'Exercices' de S. Ignace dans l'édition des Monumenta," in *Recherches de science religieuse*, 11 (1920), p. 400 ff.; H. RAHNER, in *Ignatius the Theologian*, New York, Herder and Herder, 1968, p. 124; K. RAHNER, *Spiritual Exercises*, K. BAKER, trans., New York, Herder and Herder, 1965, p. 11; and D. M. STANLEY, *A Modern Scriptural Approach to the Spiritual Exercises*, (= STANLEY), Chicago, IJS and Loyola Univ. Press, 1967, p. 77. O'MALLEY, *The First Jesuits*, pp. 37-39, is also a proponent of this more accepted school, as is FUTRELL, pp. 96, 114, 128.

God and election as the aim of the *Exercises*.”⁵⁷ T. Shanahan develops this notion but further specifies that “apostolic service” is the result of this encounter with Christ.

[...] the dynamics of the *Spiritual Exercises* lead the exercitant to a meeting with God in Christ and what issues in apostolic service is the result of that encounter with Christ. Thus, apostolic service is the key to understanding the *Exercises*.⁵⁸

This view is certainly consistent with the evidence from Ignatius’ life cited above. Shanahan goes on to say that “this service-oriented response” made by one who encounters Christ in the *Exercises* is also central to the *Constitutions*, and that the mission vow of the Society is “[...] a concrete expression of the fundamental Ignatian insight of encounter with Christ and universal apostolic activity flowing from that encounter.”⁵⁹

A closer examination of the *Exercises* shows that they are organized around a structure of four thematic “Weeks,” with additions, rules and procedures inserted both before and after, all related in some way to the prayer material.⁶⁰ The First Week consists of meditations which review the history of sin deepening one’s awareness of God’s very personal love and mercy.⁶¹ The Week is preceded by a consideration of “The First Principle and Foundation,” which sees

⁵⁷ R. SCHMITT, *The Image of Christ as Feudal Lord in the Spiritual Exercises of St. Ignatius Loyola*, PhD. Diss, Fordham Univ., 1974, p. 24 ff. See SHANAHAN, note 20, p. 182.

⁵⁸ SHANAHAN, p. 182.

⁵⁹ SHANAHAN, p. 216. His Chapter 6, pp. 171–216, presents this thesis with extensive evidence from the *SpEx.* and the *Constitutions*.

⁶⁰ Supplementary materials include: “Rules for the Distribution of Alms” (*SpEx.*, [337] ff.); “Some Notes Concerning Scruples” (*SpEx.*, [345] ff.); “Rules for Thinking With the Church” (*SpEx.*, [352] ff.); “Three Methods of Prayer” (*SpEx.*, [238] ff.); and the celebrated “Rules for the Discernment of Spirits” (*SpEx.*, [313] ff.). Of the materials listed, only the two sets of the “Rules for the Discernment of Spirits” are absolutely indispensable, and are close to the heart and soul of the *Exercises*. See FUTRELL’S comments referred to in note 2 above.

⁶¹ See O’MALLEY, *The First Jesuits*, pp. 39–40. See also *SpEx.*, [18]. Ignatius designed a great deal of flexibility into the manner in which the *Exercises* could be undertaken, allowing that they be adapted to the age, education and talent of the exercitant. For instance, the Weeks are not seven day weeks. The Fourth Week is presumably the shortest, the Second the longest, each to be adjusted to the needs of the exercitant with the entire experience lasting about thirty days. While it was seen to be best to “withdraw” from other occupations to devote oneself exclusively to the prayer (*SpEx.*, [18–21]), it was foreseen that one could spend one hour and a half each day until the experience was complete (*SpEx.*, [19]).

the end of creation to be the praise, reverence and service of God our Lord, the means by which we save our souls. There is a recommendation that the Week conclude with a general confession of all one's past sins.⁶²

The Second Week, in which one contemplates the life of Jesus up to the Last Supper, is preceded by an exercise on "the Kingdom of Christ," which "[...] is the prelude and motivating force of the second, third and fourth weeks."⁶³ This contemplation together with the meditations on "The Two Standards," "The Three Classes of Men" and "The Three Degrees of Humility," all lead up to the several exercises on making a "Choice of a Way of Life," which have clear implications for apostolic service.⁶⁴

In the 'Kingdom of Christ,' the individual imagines Christ to be a king calling disciples to follow him in labor, suffering and poverty, and in the 'Two Standards' he imagines him to be 'the sovereign and true Commander' inviting disciples to enlist under his banner in order to be sent 'throughout the whole world to spread his doctrine among people of every state or condition.' [...] The attractive presentation of worldwide evangelization in the 'Two Standards,' furthermore, obviously favors a life devoted to ministry over a more contemplative one.⁶⁵

One's response to the call of the King is confirmed and deepened through the meditation on the "Two Standards." "As a clarification of the Kingdom meditation, it looks to apostolic service modeled on Christ and his activity."⁶⁶ This is followed by meditations on the Three Classes of Men and the Three Degrees of Humility which test the exercitant's dispositions with regard to

⁶² *SpEx.*, [23, 44]. See his "Appendix II: Toward The Deeper Study of the Foundation," in GANSS, *SpEx.*, p. 208 ff.

⁶³ SHANAHAN, p. 183.

⁶⁴ *SpEx.*, [136 ff.; 149 ff.; 165 ff. and 169-189]. See also SHANAHAN, pp. 182 ff.

⁶⁵ O'MALLEY, *The First Jesuits*, p. 44. See *SpEx.*, [91 ff.; 136 ff.].

⁶⁶ SHANAHAN, p. 186.

the *means* he will choose towards carrying out apostolic service in response to the call of the King.⁶⁷

In the Third Week the exercitant asks for the grace to experience with Jesus, His passion, death, and burial; and in the Fourth Week, His resurrection, and what follows. The last exercise, entitled the "Contemplation to Attain the Love of God," is "[...] at once the crown of the retreat and a bridge to enable the exercitant to return to his ordinary round of duties."⁶⁸ It begins with the notion "[...] that love ought to manifest itself in deeds rather than in words,"⁶⁹ and that "love consists in mutual *communication*: the lover gives and communicates to the beloved all that he possibly can of everything he has, and the beloved responds with equally total self-giving."⁷⁰

The love of God to be expressed in action identified itself in the mind of Ignatius with the praise and glory of God through apostolic service. The aid of souls was an act of universal love reaching out to all men to accomplish in them the redemptive mission of Christ. [...] The love of God which grounds the mutual love of the companions and constitutes the union—the being—of the Company is also the source of its corporate action to accomplish its apostolic end.⁷¹

O'Malley adds that:

Implicitly contained in the meditation is the ideal of 'finding God in all things,' as the correlative section of the *Constitutions* enjoined members of the Society. This ideal surely had to be one of the inspirations for Nadal's repeated and bold statement that for him and his Jesuit confreres 'the world is our house.'⁷²

⁶⁷ See SHANAHAN, p. 188.

⁶⁸ STANLEY, p. 316.

⁶⁹ *SpEx*, [230: 1].

⁷⁰ FUTRELL, p. 45. *SpEx*, [231].

⁷¹ FUTRELL, p. 47.

⁷² O'MALLEY, p. 46. Cf. GANSS, *Cons.*, [288], and *M Nadal*, 5: 364-365, 469-470. Cf. also J. O'MALLEY, "To Travel to Any Part of the World: Jerónimo Nadal and the Jesuit Vocation," (= O'MALLEY, "To Travel"), in *SSJ*, 16-2 (1984).

While all these things were as yet in a rudimentary form, and would be subject to the maturation of time and experience, there is no doubt that it was at Manresa that Ignatius discovered his vocation from God, the service of Christ through the aid of souls.

5. The Holy Land

Iñigo left Manresa around 18 February 1523 and travelled through Barcelona,⁷³ to Rome where he sought the Pope's permission for his pilgrimage to the Holy Land, which he obtained on 31 March 1523.⁷⁴ It is somewhat curious that Ignatius devotes almost a fifth of his *Autobiography* to his journey to and from the Holy Land, and that "to us who have the advantage of hindsight it appears as almost a parenthesis in his life."⁷⁵ Clancy suggests that this was because Ignatius himself saw the experience as significant, or because his scribe, Gonçalves da Câmara⁷⁶ was curious about the event. Whatever the reason, the most notable occurrence of the journey transpired when the Franciscan provincial refused Iñigo's request to remain in the Holy Land. It was only after the provincial threatened him with excommunication that Iñigo reluctantly agreed to return to Europe.⁷⁷

⁷³ It was in Barcelona that he met Isabela Ferrer, wife of Juan Roser or Rosell, who became his greatest benefactor in Barcelona, Paris and Venice. Of interest is that she and two female companions became the only three women members of the Society of Jesus for a period of less than two years until Ignatius dismissed them. In the same month as the dismissals, Ignatius successfully requested of Paul IV that the Society remain "[...] free for all times from the care of women subject to its obedience" (DALMASES, pp. 72; 253-255).

⁷⁴ It was the custom of the day that, "[...] pilgrims were accustomed to ask the pope's permission for their Jerusalem pilgrimage" (DALMASES, pp. 71-74). See also, *FD*, p. 290.

⁷⁵ CLANCY, p. 31. See also the *Autobiography*, Chapters 4 and 5.

⁷⁶ Gonçalves da Câmara, Portuguese (c1519-1575), son of the governor of Madeira, met Peter Faber and the companions who were in Paris, and entered the Society in Lisbon in 1545. He was minister of the residence in Rome from 1553-1555. At the First General Congregation in 1558 he was elected assistant for Portugal to Lainez, the new superior general. In 1559 he went to Portugal to tutor young King Sebastian (see *Autobiography*, p. ix ff., and note 3, p. 138).

⁷⁷ *Autobiography*, no. 45-47. See also DALMASES, pp. 75-84.

After the said pilgrim came to realize that it was God's will that he was not to remain in Jerusalem, he kept wondering what he ought to do and finally he was inclined toward spending some time in studies in order to help souls; and for this he went to Barcelona.⁷⁸

De Giubert comments that from this time forward Iñigo was dedicated to preparing himself to exercise a "genuine apostolic ministry," and that this "[...] apostolic service took first place in his preoccupations."⁷⁹

B. Preparation for Mission

1. Studies

The years of study from 1524 to 1535 marked Iñigo's second period of interior development.⁸⁰ He intended to return to Manresa to study under a Cistercian he had known there, but upon arrival he found that the monk had died.⁸¹ Iñigo then went to Barcelona where he stayed with Inés Pascual. Isabel Roser covered at least some of his expenses, and Jerónimo Ardèvol became his teacher.⁸² After two years of studying Latin grammar in a class with young children, he was judged ready for higher education. The next eighteen or nineteen months were spent at Alcalá and Salamanca in what T. Clancy describes as, "[...] his first abortive try at university education."⁸³

⁷⁸ *Autobiography*, no. 50.

⁷⁹ DE GUIBERT, p. 33.

⁸⁰ In several of his writings Ignatius himself distinguishes three periods, the first at Manresa followed by a period of "distraction by study," which gave way to greater favours from God. See DE GUIBERT, p. 33, *SdeS*, I, 127, 94; *FN*, I, 140, 494; and *Autobiography*, no. 95. Both CLANCY, p. 32, and BRODRICK, *Pilgrim Years*, p. 31, indicate that study for Ignatius was, "*grandemente cuestra arriba*," "a terribly uphill business."

⁸¹ *Autobiography*, no. 54.

⁸² DALMASES, p. 86.

⁸³ CLANCY, p. 32.

While he haphazardly studied dialectics, the *Physics* of Aristotle, and Lombard's *Sentences*, Iñigo continued to give the *Spiritual Exercises* and teach Christian doctrine with the companions that began to gather around him in Barcelona.⁸⁴ The *Autobiography* reads:

In Barcelona, when the pilgrim was deliberating whether he should study and for how many years, his main concern was whether, after his studies, he should enter religion or continue going about the world. With the thought of entering religion, he also thought of entering a congregation that was lax and unreformed so that he could suffer more in it. [...] During the period of his imprisonment in Salamanca he was not without the same desire to help souls, and with that as his goal he decided to study and to win over like-minded individuals and keep those he had.⁸⁵

Nowhere does he indicate that he saw studies as leading to the priesthood, but it might be presumed that when he considered "entering religion" the thought had crossed his mind.

In Alcalá the audiences grew larger,⁸⁶ and because Iñigo and the companions favoured the garb worn by religious, the townspeople called them "sack-wearers" and illuminists (*alumbrados*).⁸⁷ It was not long before this came to the attention of the Inquisition, which no doubt feared another outbreak of the *alumbrados*, who had been condemned in 1525.⁸⁸ This was

⁸⁴ There were by now four companions with Iñigo. See DALMASES, pp. 93-95; DUDON, p. 108; SHANAHAN, pp. 128-135; and the *Autobiography*, nos. 57-59.

⁸⁵ *Autobiography*, no. 71. DALMASES, pp. 89-91, refers to Iñigo's participation in the reform of convents, especially that of the Benedictines of St. Clare which had recently abandoned the Rule of St. Clare for that of St. Benedict, and this in the context of the wide-spread conflict concerning *enclosure*. This question about entering religious life will arise again during *The Deliberations of the First Fathers*, and will have a significant impact on the development of the Society of Jesus.

⁸⁶ RAHNER, *Ignatius Loyola*, p. 51.

⁸⁷ *Autobiography*, no. 58. See also DALMASES, p. 95; SHANAHAN, p. 131. Good information on the *alumbrados* can be found in M. MARCOCCHI, "Spirituality in the Sixteenth and Seventeenth Centuries," in *Catholicism in Early Modern History: A Guide to Research*, J. O'MALLEY, ed., St. Louis, Center for Reformation Research, 1988, pp. 164-166; and A. HUERGA, *Historia de los Alumbrados (1570-1630)*, 4 vols., Madrid, Fundación Univ. Española, Seminario Cisneros, 1978-1988.

⁸⁸ SHANAHAN, p. 132, note 70, describes the *alumbrados* as, "[...] a spiritual sect who considered themselves graced (illuminated, enlightened) by the Spirit in such a way that they needed no connection with the Church or ecclesiastical authority. Those modern gnostics believed that they were free to be their own moral guides with the result that they frequently led vice-filled lives." DALMASES, p. 95, points out that in September of 1525 the Inquisition condemned forty-eight propositions of the *illuminati* or *alumbrados*. CLANCY indicates that, "The *illuminati* liked to consume several hosts at Mass. This made Iñigo's teaching on frequent communion suspect. One branch taught complete

just the beginning of the investigations and judicial processes that plagued Iñigo for the next number of years. Although nothing blameworthy about him was discovered, he was forbidden to treat of spiritual things, specifically about venial and mortal sins, until he had studied for four more years. Ignatius accepted the “letter of the law,” and said “[...] as long as he remained within the jurisdiction of Salamanca he would do as had been ordered.”⁸⁹ His desire to “help souls” was frustrated by this arrangement however, hence he left the jurisdiction and went to study in Paris. He also reasoned that in Alcalá and Salamanca spiritual works had diverted him from serious study, whereas in Paris his poor knowledge of French would help him to avoid these apostolic distractions.⁹⁰

2. Paris

In February of 1528 Ignatius arrived in Paris where he eventually received his Master of Arts degree on 14 March 1534.⁹¹ He remained in Paris, with small excursions, until 1535. While the University of Paris *had* been the most celebrated school of Christendom, it was not at this time reading Aristotle, Plato, and Pseudo-Denis in the original Greek as were the Spanish, German and Italian universities.⁹² Ignatius, however, was well pleased with Paris, first at the college of Montaigu with a later transfer to Sainte-Barbe, and it can be recognized that there he made several adjustments to his scholastic stratagem.

passivity before God. This seemed to the jaundiced eyes of the Inquisitors suspiciously like the ‘indifference’ spoken of in the *Spiritual Exercises* [...]. His emphasis on spiritual reading was also suspect since any spiritual book or inspired writing in the vernacular was likely to be put on the Spanish Index” (ibid., p. 33). See also, GRANERO, pp. 217–223, especially p. 220.

⁸⁹ *Autobiography*, no. 70.

⁹⁰ DALMASES, pp. 106–107. Ignatius later protected the fruit of this experience in the *Constitutions*, by recommending that distractions from study should be removed. See GANSS, *Cons.*, p. 183, [340], and pp. 190–191, [362].

⁹¹ In Ignatius’ day, especially in France, the new year began at Easter, not in January. Thus according to our way of measuring time, the degree was received in 1535. See DALMASES, pp. 116–117, and *FD*, pp. 387, 390–391, and 395–397. Also, the degree was awarded to “Master Ignatius of Loyola, of the Diocese of Pamplona” (ibid., p. 117; see also *FD*, p. 395).

⁹² CLANCY, pp. 34–35.

Ignatius especially liked the, “ ‘orden y manera de Paris,’ the *modus Parisiensis*, and these expressions reoccur in his educational prescriptions for the colleges the Jesuits later on conducted.”⁹³ Previously, his “spiritual conversations” had been mainly with women, whereas in Paris they were with students, those who would become the first companions and co-founders of the Society of Jesus. The other significant decision taken by Ignatius at this time concerned poverty. While he was still convinced that poverty was “[...] the first step in the spiritual life,” he found that he simply had to have some kind of steady income if he was to devote his life to study full-time.⁹⁴ Thus, he took occasional sojourns to the Netherlands and England to raise enough money to support him for a year.

When he moved to the college of Sainte Barbe Ignatius acquired two roommates, Peter Faber⁹⁵ and Francis Xavier.⁹⁶ Xavier helped Ignatius to review lectures he had missed, while Faber tutored him in logic and assisted in the organization of the *Spiritual Exercises* which were being revised at this time.⁹⁷ Ignatius later met Simon Rodríguez,⁹⁸ Diego Laynez,⁹⁹ Alfonso

⁹³ CLANCY, p. 35. On this point in note 33, p. 352, he refers to G. C. MIR, *Aux Sources de la pédagogie de Jésuites: Le modus parisiensis*, Rome, 1968. See also *ConsSJComm*, note 60, pp. 191-192, and SCHURHAMMER, *Xavier*, I., p. 95, note 248.

⁹⁴ CLANCY, p. 36. Ignatius' commitment to poverty cannot be overstated. Not only does it figure indispensably in the *Spiritual Exercises* (see [98, 149], and especially the “Two Standards,” [136 ff.]), but later, even before he wrote the *Constitutions*, he turned his hand to considerations of poverty. The distractions from studies caused by his poor finances in Paris, however, later influenced him to allow colleges of the Society to become endowed. See also, FUTRELL, pp. 145 ff., on the election on poverty.

⁹⁵ Pierre Favre (Peter Faber) was born in Villaret (Savoy) in 1506. He went to Paris in 1525 and lived there in the same dwelling with Xavier and Ignatius, and was the first to join Iñigo in 1531. He was also the first to be ordained a priest, 30 May 1534, and even through the time of *The Deliberations of the First Fathers* he was recognized as the spiritual father of the group. He died in Rome in 1546 and was beatified in 1872. For his life, see W. V. BANGERT, *To the Other Towns. A Life of Blessed Peter Favre, First Companion of St. Ignatius*, Westminster, Md., 1959. For his Spiritual Diary, see *Bienheureux Pierre Favre, Mémoires*, traduit et commenté par Michel de CERTEAU, Paris, 1959. See COSTELLOE, p. 7, note 8.

⁹⁶ Francis Xavier was born near Sangüesa in northern Spain on 7 April 1506. In Paris he met Peter Faber in 1526 and Ignatius in 1529. He is credited with consolidating and spreading the Christian faith in India and in the Moluccas and Moro Islands of the Indonesian archipelago, and with introducing Christianity to the newly discovered islands of Japan. He died on the island of Sancian off the coast of China in 1552. See COSTELLOE, pp. xiii-xxiv.

⁹⁷ CLANCY, p. 37. O'MALLEY, *The First Jesuits*, p. 37 indicates that the *Exercises* received few changes after

Salmerón¹⁰⁰ and Nicolás Bobadilla.¹⁰¹ The group of "friends in the Lord"¹⁰² prayed and studied together, met on Sundays to receive the sacraments together, and undoubtedly discussed their dreams and plans for the future.

3. The Montmartre Vows

On 15 August 1534, on the feast of the Assumption, the seven gathered in a chapel on the hill of Montmartre and formalized their commitment for the future by means of a vow. While the vow formula was not preserved, the contents can be reconstructed from sources.¹⁰³

In this constant sharing of ideals the project which was to orient their life for the future matured in the minds of all of them: to devote themselves to the welfare of their neighbour while living according to a plan of strict poverty, in imitation of Christ. First of all, they would undertake a pilgrimage to Jerusalem. For this purpose they would all assemble at Venice, the necessary port of embarkation. If after waiting for a whole year it should become clear that the

1540, before their first printing, with papal approval, in 1548. See also J.-C. GUY, "Les 'Exercices Spirituels' de saint Ignace: L'achèvement du texte," in *Nouvelle revue théologique*, 107 (1985), pp. 255-260.

⁹⁸ Simão Rodrigues de Azevedo was born in Vouzella (Beira Alta), in northern Portugal in 1510. He arrived in Paris in 1527 and joined Ignatius in 1532. He was the founder, and first provincial, of the Society of Jesus in Portugal, a position which he did not dispatch well. So difficult was the situation that he was almost dismissed from the Society in 1553 (see *EppIgn*, 5: 270-271). He died in Lisbon in 1579 (FX I 189-190). See COSTELLOE p. 7, note 11.

⁹⁹ Diego Laínez (Layne) was born in 1512 in Almazán. In 1533 he went to Paris, where he entered the university and became a companion of Ignatius. He was elected the second general of the Society of Jesus in 1558, and died in 1565 (FX I p. 246, n. 174; and *Epistolae S. Francisci Xaverii aiaque eius scripta*. Nova editio ex integro resecta textibus, introductionibus, notis, et indicibus aucta G. SCHURHAMMER et J. WICKI, eds., 2 vols. Romae, 1944-1955, 1, p. 234). See COSTELLOE, p. 5, note, 10.

¹⁰⁰ Alfonso Salmerón, who was born in Toledo in 1515, joined Ignatius in Paris in 1533, and died in Naples in 1585. For his life, see W. V. BANGERT, *Claude Jay and Alfonso Salmerón*, Chicago, 1985. See COSTELLOE, p. 7, note 5.

¹⁰¹ Nicolás Alonso de Bobadilla was born in Bobadilla del Camino (Palencia) in 1508 or 1509 and went to Paris in 1533, where he soon became one of Ignatius's companions. Long overdue is a comprehensive study on the tensions which existed between Bobadilla and Ignatius, and especially between Bobadilla and Nadal. Some references to the difficulties in which Paul IV became personally involved can be seen in *M Nadal*, 2: 51-53, and especially 4: 101-108. He died in Loretto in 1590. See COSTELLOE, p. 7, note 6.

¹⁰² DALMASIES, p. 119; *EppIgn*, 1, 119.

¹⁰³ "Among the earliest formulations of this vow, Favre's can be seen in *FN*, I, 36-39; Lainez's, *ibid.*, 102-104; Polaco's, *ibid.*, 184, 190; Ignatius', in *Autbiography*, no. 85, in *FN*, I, 480." From DALMASIES, p. 120, note 18.

pilgrimage was not possible, they would present themselves to the pope, that he might send them where he thought best.¹⁰⁴

In this vow the companions made four commitments: to help souls; to live in voluntary poverty and chastity; to make a pilgrimage to Jerusalem; and should they be unable to go to Jerusalem, to offer themselves to the pope in Rome. The “papal clause” held three conditions: *if* they could not get to Jerusalem within a year; *if* they were unable to stay there; or *if* they decided to leave Jerusalem because their desire to help unbelievers was frustrated, “only then did they vow to offer themselves to the Supreme Pontiff, the Vicar of Christ, so that he could send and employ them as he wished wherever they could best benefit the neighbor for the glory of God.”¹⁰⁵

At this time decisions of the group were made by consensus, and according to J. Futrell they were “always, finally, unanimous.”¹⁰⁶ However, Simão Rodrigues points out that the unanimity around the vows at Montmartre were arrived at “*longam post disputationem*.”¹⁰⁷ J. G. Gerhartz suggests that it was this influence of the group of companions and *their* discernment which modified what had been for Ignatius, when he was alone, a clear and unquestionable goal—to go to Jerusalem.

Above Jerusalem stands another goal, a higher ideal, which will determine even their decision about staying in the Holy Land. It is the service and honor of Christ as concretely measured by the greater help and fruit of souls whom they can reach through their work. This more fruitful service to souls is their shared desire, their chief goal, by which everything else must be measured.¹⁰⁸

¹⁰⁴ DALMASES p. 120.

¹⁰⁵ *ConsMHSJ*, 1, p. 162, as cited by J. G. GERHARTZ, “The Fourth Vow,” pp. 6-9. I am grateful to Gerhartz, who knows the mission vow as well as anyone alive, for his sharp scholarship and analysis of this important period.

¹⁰⁶ FUTRELL, p. 25. See also SCHURHAMMER, I, 211.

¹⁰⁷ *Ibid.*, See *FN*, III, 20.

¹⁰⁸ GERHARTZ, “The Fourth Vow,” p. 7. Gerhartz goes on to indicate that Ignatius (*Autobiography*, no 85), Lainez (*FN* I, pp. 110 & 112), and Xavier (according to Schurhammer, I, p. 200), wanted to stay permanently in Jerusalem; but Faber (*FN* I, p. 36 ff.) and probably Rodrigues (*FN* III, p. 20), were not willing to make a permanent commitment to the Holy Land and so limit their apostolate ahead of time. Gerhartz also raises the question as to whether the idea of going

But why turn to the pope to seek apostolic guidance? Why not discern their field of service among themselves? Gerhartz conjectures three reasons:

- The most strongly emphasized motive is theological. In the pope, Christ's representative on earth, the Lord himself would speak to them. 'For they were convinced that by means of his vicar Christ would graciously indicate to them the path of his greater service.' And Peter Faber, the only priest among them, remarked, when Paul III accepted their offer in 1539, that now Christ had really taken them into His service through the voice of His vicar, this being the 'clearest form of call (*manifestissima vocatio*).'
- The second reason is more on the natural, pragmatic level. With his bishops and representatives in many places, the pope has better knowledge of where the Church appears in the greatest need of help, what will be of greatest service to the Church.
- The third motive is the idea of the universality of papal authority. Only the pope has universal authority; hence, he is the only one who can guarantee a field of apostolic work not prematurely or a priori restricted to a particular ambit. Ignatius and his companions wished to serve Christ 'the Lord of the harvest of the whole Church,' 'for the edification of all,' following the judgement of the pope, 'His vicar,' 'inasmuch as he is the lord of the entire harvest of Christ.'¹⁰⁹

This understanding of obedience is quite consistent with the traditional notion in which a superior (in this case the pope) was seen as mediating the will of God. Later J. C. Murray will refer to it as the "classical" understanding of obedience, common to the world-view of the day and certainly held by Ignatius and the companions.¹¹⁰ In this context it is important to note that,

to the pope came from Ignatius or Peter Faber. See pp. 7-8 and his notes 22 -24.

¹⁰⁹ GERHARTZ, "The Fourth Vow," pp. 9-10. The Faber quote is from *FN I*, p. 42; the second reason based on *FN I*, pp. 42 & 190; and the *EppIgn*, I, p. 32; and the quotes in the third reason also come from *FN I*, p. 42: "[...] in aedificationem omnium qui sunt sub potestate sedis apostolicae [...] reddere gratias ipsi Domino messis universae ecclesiae catholicae, id est, Iesu Christo, domino nostro, qui dignatus est declarare voce sui Vicarii (quae est manifestissima vocatio) [...]; and the letter of Ignatius in 1538 (*EppIgn*, I, p. 132): 'quatenus ipse est dominus universae messis Christi.' " In this context attention should also be drawn to the excellent work of J. O'MALLEY, "The Fourth Vow in its Ignatian Context: A Historical Study," in *SSJ*, 15-1 (January 1983), especially to Part II, "St. Ignatius and Orthodoxy" and Part III, "St. Ignatius and the Church."

¹¹⁰ This will be discussed in the next Chapter.

Here were laid the foundations of what was to be the fourth vow of special obedience to the pope in what pertains to 'missions,' which the professed¹¹¹ of the Society will pronounce. This vow, according to the felicitous expression of Blessed Pierre Favre, was virtually 'the foundation (*fundamentum*) of the whole Society' and 'its most manifest vocation.'¹¹²

The companions had no intention at this time of founding a religious order. Nor did they develop juridical structures of authority.

The structure[s] of authority and obedience and the role of the superior would appear only when it would become clear that they were necessary means to fulfil the scope of the vocation of the Company of Jesus.¹¹³

Their clear motivation now was to find and do with their lives that which would be more conducive to the greater glory and service of God.

During the rest of his time in Paris, until about April, 1535, Ignatius studied theology, continued to meet with the companions and sought and obtained formal approval for the *Spiritual Exercises* from the inquisitor Valentin Liévin in March of 1535.¹¹⁴ In April he journeyed to Spain for reasons of health,¹¹⁵ to settle some family affairs for several of the companions, and, according to Polanco, "[...] to spend some time at Azpeitia to make amends with apostolic works for the bad examples he had given there during his youth." He planned to meet the companions in Venice and from there continue on the pilgrimage to Jerusalem. Before he departed, "[...] he left Peter Faber '*como hermano mayor de todos,*' not to rule the others, but to watch over their

¹¹¹ This shall be considered later, but suffice it to say here that there are different "grades" or classes in the Society. The "professed" fathers are those who pronounce the mission vow, the vow of obedience to the pope with regard to missions. Others can be definitively incorporated into the Society without making this profession.

¹¹² DALMASES, p. 121. See also *FN*, I, 42.

¹¹³ FUTRELL, pp. 24–25. He also points out on p. 25 (from *FN*, I, p. 104) that at Venice, in 1536, the companions "[...] made their first experiments with obedience, taking weekly turns as the superior whom the others obeyed voluntarily, but as if bound by a vow of obedience. They were to continue this practice until Ignatius' election as general in April, 1541."

¹¹⁴ DALMASES, p. 124.

¹¹⁵ DALMASES, p. 126; 278–289. Throughout his life Ignatius suffered "stomach trouble," which an autopsy revealed to be *biliary lithiasis*, gallstones with referred stomach pains.

needs with the affectionate care of an older brother."¹¹⁶ Faber was able to attract three more followers to the group completing the company of those who would found the Society: Claude Le Jay,¹¹⁷ Paschase Broët,¹¹⁸ both already priests and Jean Codure,¹¹⁹ who was near ordination.

4. Carafa and the Theatines

During the period of over a year before the companions met in Venice, the most notable occurrence was Ignatius' meeting in Venice with Gian Pietro Carafa, later to be Paul IV.¹²⁰ Carafa was the bishop of Chieti (or in Latin, *Theate*), and in 1524, together with Gaetano Thiene, had founded the Theatines for which he served as the first superior. He experienced tension with Ignatius from the beginning of their relationship especially on their views of religious life.¹²¹

¹¹⁶ FUTRELL, p. 24. See *FN*, I, 104.

¹¹⁷ Claude Le Jay was born in Micussy, Upper Savoy, between 1500 and 1504. He went to Paris in 1533 and joined Ignatius and his companions in 1535. He died in Vienna in 1552 (see COSTELLOE p. 7, note 12).

¹¹⁸ Paschase Broët was born in Bertrancourt, Picardy, around 1500. He moved to Paris in 1534 and two years later was already one of Ignatius's companions. He died there in 1562 (see COSTELLOE p. 7, note 7).

¹¹⁹ Jean Codure was born in Seyne (Provence) in 1508 or 1509. He joined Ignatius and his companions in Paris in 1536 and died in Rome in 1541 (*FX* vol. 1, p. 263) (see COSTELLOE p. 7, note 3).

¹²⁰ "Carafa, born in 1476 to an old and noble Neapolitan family, had already served as papal nuncio in Naples and Spain and as legate to England in 1513. He was closely identified with the Oratory of Divine Love [...]. In September of 1536, when Paul III called him to Rome to serve as a member of the reform commission, Carafa was nearing the height of his career as an ecclesiastic. Nuncio, legate, bishop, reformer, and founder, he nevertheless was a member of the generation that had seen the hopes and expectations of humanism end in schism and his desire for reform was increasingly tempered with distrust for those who would tamper with the fundamental structure of the Church. He sought to repair the structure of ecclesiastical authority, reform the hierarchy, and discipline the clergy but his spirituality and his outlook on the religious life were traditionalist" (P. A. QUINN, "Ignatius Loyola and Gian Pietro Carafa: Catholic Reformers at Odds" [= QUINN], in *The Catholic Historical Review*, 67 [1981], p. 387).

¹²¹ DALMASES, pp. 140-142. They varied on their notions of poverty, cloister, and apostolic style. This can be seen in a letter from Ignatius to Carafa found in *EppIgn.*, I, 114-118, quoted in Appendix III. Quite a number of historians have puzzled over this letter. There are those, like G. BOTTEREAU ("La 'Lettre d'Ignace de Loyola à Gian Pietro Carafa,'" in *AHSJ*, 44 (1975), p. 140 ff.) who suggest that the letter was never sent by Ignatius to Carafa, and even that they did not meet. Others, like L. VON PASTOR (*History of the Popes From the Close of the Middle Ages, Drawn From the Secret Archives of the Vatican and Other Original Sources From the German*, R. F. KERR, ed., London, Kegan Paul, Trench, Trübner, 1929-1953, vol. 14, pp. 56 ff.) say that they met several times and didn't get along. J. BRODRICK, (*St. Ignatius Loyola*, vol. 1, *The Pilgrim Years: 1491-1538*, New York, Burnes and Oates, p. 325) accounts for the letter

Carafa's notion is well represented in a letter he wrote in 1532 where he justifies the Theatine pious retreat from the world: "because it is necessary in these evil days, we gladly stay in the house, with wondrous love fleeing from every practical engagement."¹²² It is interesting that even as early as this Ignatius had sketched out the beginnings of his biases regarding religious life as an active, missionary insertion in the world, rather than the monastic withdrawal from it.

P. A. Quinn contrasts their two divergent visions:

The Theatine Rule is directed toward the establishment of a model community, a light to shine before men. Prayer is to be observed twice daily in each cell; fasts are to be 'observed most conscientiously'; the Office—"both night and day parts"—to be chanted in choir; no priest is to leave the community alone and the community itself, mindful of God's providence, will refrain from the self-corrupting process of soliciting financial support and will live 'by the gifts of the faithful freely offered.' An order purified in head and members, they will stand as an example to the world and the Church of a renewed and perfect Christian community.¹²³

Of the Ignatian perspective, Quinn says:

Loyola, now with 'the responsibility of authority,' is not interested in creating spiritual models but in an order that seeks out the world in 'actual accomplishment and meaningful service.' The tradition of the cloister, however reformed and oriented toward works of mercy, is irrelevant to Loyola's design, to his direction that the Society will have no limits, going where the pope sends them whether 'to the Turks or the New World or the Lutherans or to others be they infidel or faithful.' Loyola's charge is to the formation of an 'état de mission,' a radical departure from the restrictions of tradition, that makes the liturgical punctiliousness of the Theatines mere encumbrance.¹²⁴

because of Ignatius' chagrin "at the failure of the Venetian Theatines to expand their numbers," and thus the reason for "the persistent animus of the Bishop against Ignatius." Unfortunately there are no sources available that will solve the matter once and for all. Cf. QUINN, pp. 388-389, and p. 386, note 1, for further references.

¹²² "Noi siamo volentieri in casa con mirabile amore de fuggire ogni practica perché così bisogna in questi mali giorni," P. PASCHINI, *S. Gaetano Theine, Gian Pietro Carafa e le origini dei chierici regolari teatine*, Rome, Scuola Tipografica Pio X, 1926, p. 71. English in T. M. LUCAS, *The Vineyard at the Crossroads: The Urban Vision of Ignatius of Loyola*, (= LUCAS), PhD Diss., Graduate Theological Union, Berkeley, CA, UMI Dissertation Services, 1994, p. 26, note 50.

¹²³ QUINN, pp 396-397. See also, MEISSNER, p. 193.

¹²⁴ QUINN, p. 397. See MEISSNER, pp. 193-194.

On two occasions Carafa expressed desires to see a merger of the Theatines and the Society. This was vehemently opposed by Ignatius and the companions who feared that Carafa would alter what they considered to be essential characteristics of the Society.

The chanting of the Office 'we have found to be a considerable hindrance to us'; fasts and discipline are not to be imposed because 'we do not wish ours to allege any excuse for not carrying out what we have set before ourselves'; the diffuse hierarchy of superiors and elders to be replaced by the central authority of the *praepositus*. They are to support themselves in the world, 'to receive money and the value of things given them in order to provide for the necessities,' and to enter upon the education of the young. The Society will not stand before the world but in it, and its apostolate will adapt where possible 'in accordance with the circumstances of persons, places and times.'¹²⁵

Later, when Ignatius as the superior general received word that Carafa had been elected pope, he "[...] showed a notable change and disturbance in his countenance and, as I came to know later (whether from his own lips or from the Fathers to whom he told this, I do not know), all his bones were shaken within him."¹²⁶

5. Venice

The companions reunited in Venice in January of 1537 and busied themselves with apostolic works until Easter when they could seek permission in Rome for the pilgrimage to the Holy Land. This they obtained from the pope on April 27, along with dimissorial letters for those yet unordained signed by the chief penitentiary, Cardinal Pucci, granting them "[...] permission to receive sacred orders from any bishop, even though he be outside the territory of his

¹²⁵ QUINN, pp. 397-398; and MEISSNER, pp. 193-194. See also DALMASES, p. 286-287, who points out that after the death of Ignatius, Paul IV, did impose upon the Society office in choir, and a three year term for the general. These changes died with the pope. On the other hand, Paul IV was friends with Laynez and Bobadilla and he granted to the Roman College (what was to become the Gregorian) power to award degrees in philosophy and theology to non-Jesuits.

¹²⁶ *Memoriale*, no. 93, *FN*, 1, p. 582-583. The complete *Memoriale* of G. DA CÂMARA, can be found in *FN*, 1, 256-298; 508-752. See DALMASES pp. 278, 286, and 141. MEISSNER, p. 193, says: "the new pope had been described as stubborn, harsh, impetuous, and impatient of all opposition. Loyola was equally determined, if somewhat less volatile."

jurisdiction."¹²⁷ On 24 June 1537, Ignatius, Bobadilla, Codure, Xavier, and Laynez, were ordained to the priesthood by Bishop Nigusanti of Arbe.¹²⁸ Rodrigues, not yet twenty-two and too young for priesthood, received all the orders up to the diaconate.

Since it continued to be impossible for them to obtain transportation to Jerusalem, they distributed themselves through various cities where there were universities in the hope of attracting young men and adding to their numbers. At this time another issue arose: by what name were they to call themselves if asked?

And, seeing that they had among themselves no other superior except Jesus Christ whom alone they desired to serve, it seemed to them most fitting that they should take the name of him whom they had as their head, by calling themselves the company of Jesus (*la compañía de Jesús*).¹²⁹

A few months later, when passage to Palestine was still impossible and while on the way to Rome, Ignatius had an experience which he understood as confirmation of their choice of name.

6. La Storta

In a vision in the chapel at La Storta, a few kilometers from Rome, in October of 1537, the Father placed Ignatius with Jesus Who was carrying His cross, and said, "I will that you take

¹²⁷ DALMASES, p. 145. The text of the letters can be found in *FD*, pp. 526-529. H. RAHNER, *Ignatius: The Man and the Priest*, trans. of six chapters of, *Ignatius von Loyola als Mensch und Theologe*, J. COYNE, trans., *CIS*, Rome, 1977, p. 8, points out that the letters did not indicate the title to be assumed at ordination, and that after some consideration, Ignatius chose the title of perfect poverty over that of *sufficiens literatura*. It is interesting to note that at this time one outside a religious order could be ordained, with a dispensation, under the *titulus* of poverty and/or sufficient learning.

¹²⁸ DALMASES, p. 146 and RAHNER, p. 69.

¹²⁹ DALMASES, p. 149, quoting from *PoiSum*, no. 86, in *FN*, I, 204. See also DE ALDAMA, *Formula*, pp. 38-39. FUTRELL has an excellent note 29 on p. 25 where he points out that J. ITURRIOZ, in his "Compañía de Jesús: Sentido histórico y ascético de este nombre," in *Manresa*, 27 (1955), pp. 43-53, shows that the word *Company* was commonly used by pious groups of the day, and he argues that Polanco (*FN*, II, p. 579; *Polchron*, I, p. 74) and Ribadencyra (*De ratione instituti* [Rome, 1984], pp. 47-49), gave a military note to *Company* for external reasons. He concludes that the word *Jesus* is the important one in the name. Th. BULTMANN, however, in his "Compagnie de Jésus. Origine et sens primitif de ce nom," in *RAM*, 37 (1961), pp. 47-60, is more correct in pointing out that the word was Spanish, not Italian, and meant simply *companions*. B. SCHNEIDER, "Nuestro principio y principal fundamento: Zum historischen Verständnis des papstgehorsamsgelübde," in *AHSJ*, 25 (1956), pp. 488-513, also accents the notion of companionship in the word *company*. See also O'MALLEY, *The First Jesuits*, p. 45.

him for your servant.” The Son said to Ignatius, “I will that you serve Us.” The Father then added, “I will be propitious to you in Rome.” Ignatius indicated that while he did not understand the significance of the Father’s words and thought that they might mean that he would be crucified in Rome, he had no doubt that the Father was placing him with His Son. “With deep feeling Ignatius perceived himself as one intimately united with Christ; and he also desired that the Society which was soon to be founded should be totally dedicated to Him and bear His name.”¹³⁰

7. Rome

Ignatius, Faber and Lafnez arrived in Rome in November of 1537 to present themselves and their companions to the pope in fulfilment of their vow. This occurred sometime before Peter Faber wrote a letter dated 23 November 1538 to Dr. Diogo, the old master of the College of Sainte Barbe:

All of us who have bound ourselves together in this Society have pledged ourselves to the Supreme Pontiff, since he is the master of Christ’s whole harvest. When we made this offering of ourselves to him, we indicated that we were prepared for anything that he might decide in Christ for us. [...] The reason why we subjected ourselves to his will and judgement in this manner was that we knew that he has a greater knowledge of what is expedient for Christianity as a whole [...].¹³¹

The pastoral, apostolic motivation for offering themselves to the Universal Pastor may be noted again here. Later, when the “offering” becomes a “vow,” this intention will be preserved both in the *Formula* and in the *Constitutions* so as to obtain “surer direction from the Holy Spirit” in the choice of apostolic missions through the pope who is Christ’s Vicar.

¹³⁰ DALMASES, p. 153. Discrepancies in the testimonies of the vision are solved by H. RAHNER, in “La vision de Saint Ignace à la chapelle de la Storta,” in *Christus*, 1 (1959), pp. 48–65, and in his *The Vision of St. Ignatius in the Chapel of La Storta*, Chapter 4 of *Ignatius von Loyola als Mensch und Theologe*, R. BRENNAN, trans., CIS, Rome, 1975, 132 p.; and R. ROUQUETTE, “Essai critique sur les sources relatant le vision de Sainte Ignace de Loyola à la Storta,” in *RAM*, 33, (1957), pp. 34–36, 150–170. See also CLANCY, pp. 40–42.

¹³¹ *Eppign*, 1, 132–134. See also CLANCY, p. 46; and SCHURHAMMER, vol. 1, p. 441

In Rome they set about various pastoral activities: Faber and Lainez taught at the University of Rome, and Ignatius gave the *Exercises*. Paul III even invited them to carry on theological disputations in his presence.¹³² The winter of 1538 was the most severe in memory and the group distinguished themselves by their charity and works of mercy.

Particularly during the first winter, 1537–38, severe itself and coming after poor harvests, the Companions helped house, clothe, and feed hundreds of people (a significant percentage of the city's population). Before long they had launched an orphanage, a home for prostitutes trying to start over and another for girls in danger of turning to prostitution, a refuge for persecuted Jews, and a school to teach everything from the alphabet through the humanities. The school, to the astonishment of the Romans, was free. These efforts for the marginated and the poor emerged from the experience of the *Spiritual Exercises*.¹³³

Requests for their service soon came in from other cities.¹³⁴ The pope decided that Broët and another companion were to be sent to Siena—the first exercise of the mission vow. The companions realized that they would soon be separated and this gave rise to a new question: “What would become of the group after the pope decided to send one here and another there? Would it dissolve, if each one was left to himself?”¹³⁵ They decided to meet together in common for as long as necessary to determine their future, and from March to June 24 they held what came to be known as *The Deliberations of the First Fathers*.

¹³² FN, III, 327.

¹³³ TETLOW, p. 27.

¹³⁴ DALMASES, p. 164. The ambassador of Charles V wanted some of the companions to be sent to America and the king of Portugal asked for some to be sent to India.

¹³⁵ DE ALDAMA, *Formula*, p. 28; DALMASES, p. 165.

C. The Founding of the Society of Jesus

1. *The Deliberations of the First Fathers:*

The *Deliberations* are significant, not only because here the companions chose to form a religious community and made the first sketch of the Institute, but also because many see in the methodology they employed an instrument that may be used for communal decision making.¹³⁶

The primary concern here, however, is the content of the discussions, for as J. Futrell points out:

The key document for understanding the "scope of our vocation" is the *Deliberations of the First Fathers*, which describes the founding of the Company for the achievement of its ecclesial end. All the subsequent documents up to and including the Constitutions are really merely commentaries on the *Deliberation of the First Fathers*.¹³⁷

T. O'Gorman, agrees in spirit with Futrell when he says:

In a marvellous way, the *Deliberations of the First Fathers* in 1539 remain an extremely faithful witness to the genuine Ignatian insight. The question that the First Fathers put to themselves, the arguments that they weighed both for and against obedience vowed to a superior, the answers that were recorded and the decisions that were taken at those early *Deliberations*, all give a splendid picture of what the Constitutions subsequently formulated.¹³⁸

Let attention be turned to that occasion where the companions moved toward the founding the Society of Jesus.

It is reported that two fundamental questions were considered. The first concerned forming themselves into a body or an organized group; the second, whether they should vow obedience to one of their own number.

¹³⁶ For contributions on this topic see J. TONER, "The Deliberation That Started the Jesuits," (= TONER), in *SSJ*, VI, 4 (June, 1974), pp. 179-212.

¹³⁷ FUTRELL, p. 16. The Latin text of the *Deliberatio primorum Patrum* from *ConsMHSJ*, 1, pp. 1-7, in the volume entitled *Constitutiones et Regulae Societatis Iesu*, can be found in Appendix IV. It is commonly held that it was written by Peter Faber who may have chaired the meetings, Cf. *Ibid*, 1, xxxvii; Cf. also DE ALDAMA, *Formula*, p. 29. English trans. are by D. MARUCA in *WL*, 95 (1966), pp. 325-333; TONER; and the text which shall be used here, by FUTRELL, pp. 187-194 (= *Deliberations*), in Appendix V.

¹³⁸ T. O'GORMAN, *Jesuit Obedience From Life to Law: The Development of the Ignatian Idea of Obedience in the Jesuit Constitutions, 1539-1556*, (= O'GORMAN), Manila, Loyola House of Studies, Ateneo De Manila Univ., 1971, p. 107.

[3]. The first evening we came together, this question was proposed: after we had offered and dedicated ourselves and our lives to Christ our Lord and to His true and legitimate vicar on earth, so that he might dispose of us and send us wherever he might judge we could be most effective—whether to the Indies, the heretics, or among any of the faithful or among non-Christians—would it be better for us to be so joined and bound together in one body that no physical dispersal, however great, could separate us? Or perhaps would this be inexpedient?¹³⁹

It should be noted that the companions had proposed to undertake missions and that the pope had accepted their offer prior to these meetings. In fact, the matters under consideration here arose as practical consequences of living out that apostolic intention.¹⁴⁰ Also reiterated is the motivation for the offering they made to the pope, that he might send them to “[...] wherever he might judge we could be most effective [...].” As J. O’Malley states it: “The pope, as ‘universal pastor,’ symbolized and helped implement the worldwide vision that animated the Jesuits’ concept of their ‘missions.’ ”

Since in Venice, where they worked in several local towns, they had already experienced a unity in *dispersia*, it is not surprising that they responded affirmatively to the question of organizing into a body. The difficulty they now faced was to choose the form it should take, for now it was clear to them that they were considering life together in a religious institute. They posed for themselves this question:

[...] we now asked whether we should pronounce a third vow, namely to obey one of us in order that we might carry out the will of our Lord God more sincerely and with greater praise and merit and, at the same time, carry out the will and command of His Holiness to whom we had most willingly offered our all: will, understanding, strength, and the rest.¹⁴¹

¹³⁹ *Deliberations*, I, [3]. The similarity of intention regarding the mission vow as it is expressed here and in both the *Constitutiones circa missiones*, and the *Constitutions* will be noted.

¹⁴⁰ It shall be seen that B. SCHNEIDER holds that obedience to one of their own number is subsidiary to the commitment to the pope. Cf. his “Nuestro principio y principal fundamento: Zum historischen Verständnis des Papstgehorsamsgelübde,” (= SCHNEIDER), in *AHSJ*, 25, 1, 56, pp. 488-513.

¹⁴¹ *Deliberations*, [4].

The discussion on this question reveals much about their self-understanding and the intention of their project. At no time did the consideration of obedience compromise the commitment they had made to the pope, but instead helped to further refine and facilitate it.

Since the method employed to answer the first question proved inadequate to deal with the second, they decided to undertake three “preparations of soul” to assist them: (1) each would seek “joy and peace in the Holy Spirit concerning obedience” through prayer and sacrifice; 2) so as to protect the freedom of each, they would not talk to each other on the matter but would pray privately; (3) they would consider the question as outsiders, i.e., seeking the objectivity of one who was not a member of the group.¹⁴²

The next day they shared some of the disadvantages they saw in obedience. One saw that, “on account of our failings and sins,” religious life had a bad reputation among Christians. Another suggested that obedience would discourage some from joining their company. But perhaps the most revealing objection expressed was the following:

If we wish to live under obedience, perhaps we will be obliged by the Supreme Pontiff to live under some already established and constituted rule. If this happens, since it might not give us the opportunity and scope to work for the salvation of souls, which is our unique purpose after concern for our own souls, all of our desires, which in our judgement we have received from the Lord our God, would be frustrated.¹⁴³

¹⁴² *Deliberations*, [5]. L. ÖRSY, “Toward a Theological Evaluation of Comunal Discernment,” in *SSJ*, 5-5 (October 1973), p. 148 ff., considers: “[...] to what extent the decision of the small group to accept mission from one of them—that is, to form a religious order in the classical sense—emerged from the group, and to what extent it came from Ignatius. [...] In the first hypothesis all would have contributed equally throughout the process. In the second, the group would have gradually appropriated the vision of its leader.” While Örsy protests that he is not prepared to offer a definitive answer, it is clear that he favours the latter position, based primarily on Ignatius’ actions following the illuminations at the Cardoner and La Storta. This view is consistent with evidence found in a letter Ignatius sent to his brother shortly after the Montmartre vows, which indicates that Ignatius had thought about the notion. See the letter in *Mi Epp.*, 1: pp. 148–151. However, TONER, Part I, C, “The Role of Ignatius in this *Deliberation*: His Attitude and His Influence on the Others,” pp. 180–184, takes exception to the inference of Örsy, but concedes that “[...] we can be sure that the basic method of discernment used by the nine in discerning about obedience is the same whether Ignatius was with them in their ignorance and search or was not. It seems more likely he was; but, if not, his contribution could be no more than giving input, data, for the others, who discerned by the same method they would if Ignatius were with them. [...] To say he persuaded them to his own conviction would, I am suggesting, miss the special character of the Ignatian charism” (p. 183). See also his long notes 5 and 6.

¹⁴³ *Deliberations*, [7]. In 1215 the Fourth Lateran Council (const. 13), confirmed by Innocent III, and in 1274 the

This concern indicates that the companions had already arrived at a certain clarity regarding not only their apostolic intention but also the style or the “way of proceeding”¹⁴⁴ of the company. It is of no little importance to recognize that they believed that their “unique purpose” had been “received from the Lord our God,” and that they trusted, and even expected, that God would reveal His will to them through the prayer in which they were engaged. This recalls a fundamental principle of the *Spiritual Exercises* referred to earlier, where it is believed that God will communicate Himself directly to the devout soul.¹⁴⁵

The concern noted above also demonstrates the depth of the companion’s reluctance to compromise what they considered as indispensable elements of the Institute. This is more apparent when one recalls that Iñigo had previously considered joining an existing religious institute, but had dismissed the idea for the same reason suggested here. The dispute between Ignatius and Carafa on this very point may also be recalled. It is interesting to speculate on what may have happened if the pope had accepted their offering to become a religious institute, but had required them to accept one of the existing rules.

The companions then shared some advantages they saw in professing a vow of obedience. Two practical concerns were expressed: obedience would help focus responsibility within the group; and obedience would assist it “to continue in being.” Two more ascetical reasons offered were: “Obedience brings about constant actions of heroic virtue”; and “Nothing so lays low all pride and arrogance as does obedience.” The final argument advanced was:

Although we have given ourselves over to all obedience both universal and particular to the Supreme Pontiff and pastor, nevertheless, he would not be

Second Council of Lyons (const. 23), confirmed by Gregory X, decreed that future religious institutes were to adopt one of the four established and approved Rules, those of St. Basil, St. Augustine, St. Benedict or St. Francis. See TANNIR, I, pp. 242, and 326-327.

¹⁴⁴ O’MALLEY, *The First Jesuits*, pp. 37--375, offers an excellent description of our “way of proceeding.”

¹⁴⁵ See *SpEx*, [15].

able to take care of our particular needs, which are innumerable—nor would it be fitting for him to do so if he could.¹⁴⁶

In light of this discernment process and the reasons offered, it is not difficult to understand why some might consider the vow of obedience to one of their own to be subordinate to the mission vow. After many days the companions decided unanimously to vow obedience to one of their number and on 15 April 1539 eleven companions signed the following document:

I, (N), the undersigned, testify [...] that I have freely judged it to be more according to the praise of God and the perpetuation of the Society, that there be in the Society a vow of obedience. And I have freely committed myself above and beyond the vow and any obligation to enter the same Society, if it be confirmed by the pope.¹⁴⁷

The next task was to determine the essential structure of the Institute and seek its approval from the pope.

2. The *Formula of the Institute*

Between 15 April and 24 June 1539 the companions continued to meet every evening to make the decisions¹⁴⁸ which would frame the first draft of what would become the rule of the Society of Jesus, commonly called *The Formula of the Institute*.¹⁴⁹ T. O’Gorman points out that

¹⁴⁶ *Deliberations*, [7].

¹⁴⁷ “De obedientiae voto faciendo,” *Monumentum* 2, in *ConsMHSJ.*, 1, p. 8. For the eleven signatures see, *ConsMHSJ.*, 1, p. xlv. See O’GORMAN, p. 21, note 27. The eleventh signatory was Diego de Caçeres, an early member who left the group in 1542.

¹⁴⁸ These decisions are recorded in *Determinationes Societatis*, *ConsMHSJ.*, 1, pp. 9–14. On pp. 12–13 it is interesting to note that, given his later difficulties, it was Bobadilla’s disagreement on the way children should be taught that moved the companions away from their practice of unanimity in decision making to requiring only the majority of votes.

¹⁴⁹ See GANSS, *Cons.*, pp. 39–47, and DE ALDAMA, *Formula*, pp. 33–35. GANSS draws attention to several important points. He indicates that words used in a juridical text must be used with the technical meaning in mind, and that some terms may be used by succeeding eras in new applications with even different meanings. Two words that merit careful attention are *rule* and *rules*. “Constitutions taking the place of a Rule in the strict ancient sense first appeared, it seems, with the Carthusians (founded in 1086).” Then with the “[...] Trinitarians (1198), Minims of St. Francis de Paul (1454), Camillians (1586).” Historically a community under a *Rule* was designated an *Order* which pronounced *solemn vows*. Many newer *Congregations* which pronounced *simple vows* had, as their fundamental law, a collection of statutes called *Constitutions* which were supplemented by a collection of *rules* or *customs* which dealt with matters of less

during this time several points were refined. Paramount among the clarifications was that anyone entering the Society was to take a "vow of obedience to the pope, offering to go any place the pope may wish to send him, be it among the faithful or among infidels, according to his capacity for helping the neighbour."¹⁵⁰ O'Gorman highlights the distinction which was made between those more or less capable, but indicates that all received into the Society were expected to be available for mission.¹⁵¹ Two points of "inter-mediation" then appear: the vow of obedience to the pope would normally be made through the superior of the Society; and the one to be sent should not enter into negotiations directly with the pope regarding where he should go, but again leave it to the superior.¹⁵² A month later it was decided that there should be one superior, that he should be elected for life, and that he was to receive the judgement of others with regard to accepting and dismissing novices.¹⁵³ The *Deliberations* are considered to have closed on 24 June 1539.

importance than *Constitutions*. The Holy See would approve the *Constitutions*, and *rules* would be added later to further specify the *Constitutions*. Thus the meaning of the two terms became reversed. DE ALDAMA, *Formula*, p. 34, points out that the companions may have avoided calling the *Formula* a Rule because of the conciliar decrees that prevented the writing of a *new* rule. Instead they called it a Formula or way of life, *formula vivendi, forma vitae*, an expression that at first, "[...] was meant to indicate the way of life contained in the document; later on it designated the document that contained it, whereas the way of life was called 'Institute' (*institutum vitae*). This explains the phrase introduced in the final draft of the Formula: 'Our Institute as comprised in this Formula.' This is how the expression 'Formula of the Institute' was coined and later consecrated by usage." The Society emerged, however, in a time of transition, and while it is clear that Ignatius and his companions regarded the *Formula* with the ancient understanding of a *rule*, when Ignatius wrote further determinations or applications of his *Constitutions*, he called them ordinances or rules (*ordenanzas o reglas, ordinationes vel regulae*). "In his *Constitutions*, which give his final terminology, the word *rules* always refers to such directives or regulations which are of less importance than a constitution. Generally this statement holds true also of most other early Jesuit documents; but one must be alert for exceptions. [...] other terms too were used interchangeably with them, such as statutes (*statuta*), cautions (*monita*), or duties (*officia*)" (GANSS, *Cons.*, pp. 46-47).

¹⁵⁰ O'GORMAN, p. 21. See also *Determinationes Societatis*, in *ConsMHSJ.*, 1, p. 10.

¹⁵¹ See O'GORMAN, p. 21, note 28. Cf. *Determinationes Societatis*, in *ConsMHSJ.*, 1, p. 10. See also D. BROWN, *The Origins of the Grades in the Society of Jesus, 1540-1550*, Rome, Excerpta ex dissertatione ad Lauream in Facultate Iuris Canonici Pontificiae Universitatis Gregorianae, 1971, 121 p. On p. 37 ff. he considers the practical and legal limits on those who undertake missions from the pope. This shall be considered in greater detail in a later Chapter.

¹⁵² See VALERO, *De legibus*, II, no. 39, in Appendix VI.

¹⁵³ *ConsMHSJ.*, 1, pp. 11-14. Cf. O'GORMAN, pp. 21-22.

The *Formula*, or First Sketch of the Institute (*Prima Societatis Jesu Instituti Summa*), is divided into five articles or “chapters” with a conclusion, and, not surprisingly, is known as *The Five Chapters*, (*quinque capitula*).¹⁵⁴ The *Chapters* are organized as follows:

- Chapter 1. The aim, apostolic vocation, and essential features such as a superior, a set of rules, the superior’s council.
- Chapter 2. The vow of obedience to the pope.
- Chapter 3. The vow of obedience to the superior, and recommendations for the teaching of catechism.
- Chapter 4. Poverty in the Society, with an exemption in favour of scholastics (i.e., Jesuits in formation).
- Chapter 5. Exclusion of choir and solemn church services; recommendations not to impose austerities and for many probations before profession; conclusion.¹⁵⁵

It is not astonishing to see that the mission vow is considered in the Chapter preceding the one on evangelical obedience, since even the order of presentation reflects the importance it held in the experience and intention of the first companions. It could well be argued that it could have been placed in the first Chapter since the mission vow is such an essential feature of the aim and apostolic vocation of the Society.

The draft was submitted to T. Badía, master of the Sacred Palace, for his opinion, and then, with Badía’s opinion, to Paul III who was at Tivoli with Cardinal Contarini. On 3 September 1539 Contarini wrote: “I had a meeting with His Holiness today and, besides making an oral request, I read him all *The Five Chapters*. His Holiness liked them very much and very

¹⁵⁴ The critical edition of the 1539 draft of the *Formula of the Institute* is found in *ConsMHJ*, 1, pp. 14–21.

¹⁵⁵ *Ibid.*; see DE ALDAMA, *Formula*, p. 29.

kindly approved and confirmed them."¹⁵⁶ At the same time the pope indicated that Cardinal Ghinucci, the secretary for papal briefs, should draw up the appropriate document.

The written approbation of the pope's oral approval was not a simple matter of protocol as it should have been. Ghinucci objected to three items of *The Five Chapters*: the exclusion of choir and solemn worship which he thought could be interpreted as a concession to the Reformers who criticized the practice; the suppression of some traditional mortifications, like the lack of imposed penances for example; and especially the inclusion of the vow of obedience to the pope which he regarded as superfluous.¹⁵⁷ Ghinucci considered the matter important enough to require a papal bull rather than a brief, since bulls fell under the competency of the papal chancery which, following the best of bureaucratic ideals, would examine the project to assure that it was in conformity with the norms of its office.¹⁵⁸ In an attempt to move around these obstacles and resolve the dispute between Contarini and Ghinucci, the pope asked Cardinal Guidiccioni to handle the matter. Guidiccioni liked the *Five Chapters*, but, quoting the conciliar decrees of Lateran IV and Lyons II, he expressed his adamant opposition to the founding of a new religious order. He previously had expressed his opinion that except for the Benedictines, Cistercians, Franciscans and Dominicans, all other orders should be suppressed. With the Institute at risk, Ignatius responded in his characteristic manner: with prayers and politics. He promised

¹⁵⁶ *ConsMHSJ*, 1, 21-22. Contarini indicated that the pope not only approved them orally (*vivae vocis oraculo*) but added, "The finger of God is here," (*Digitus Dei est hic*). Trans. from DE ALDAMA, *Formula*, p. 30. See also DALMASES, pp. 169-170. DE ALDAMA, *Formula*, p. 30, referring to c. 79 in *CIC 17*, c. 74 in *CIC 83*, and coll. c. 239, n. 17, points out that, "An oral approval attested in writing by a cardinal has full validity in law." On this basis an argument could be put forward for 3 September 1539 as the date of the foundation of the Society of Jesus.

¹⁵⁷ For a more detailed history see DALMASES, pp. 170-171, and DE ALDAMA, *Formula*, p. 30.

¹⁵⁸ While his motives *may* have been sincere, it may be noted that it was in a brief, *Dominus ac Redemptor*, 16 August, 1773, (in *ConsMHSJ*, 1, pp. 313-328), not a bull, through which the Society was suppressed, and a further brief, *Gravissimis ex causis*, (*ConsMHSJ*, 1, p. 328 ff.), which erected a commission of five cardinals to carry out the suppression. It was, however, another bull, *Sollicitudo omnium Ecclesiarum*, 7 August 1814, by Pius VII, which restored the Society.

God that three thousand Masses would be celebrated and then he lobbied all his influential friends in Italy.

Cardinal Guidiccioni finally came to terms: through the commission appointed by the pope to decide the matter, he suggested that the number definitively admitted to the Society should be limited to sixty.¹⁵⁹ Three other categories of small changes were also added at this time. The first was due to Cardinal Ghinucci: the sections dealing with solemn worship and common exterior life were omitted; and the following explicit justification of the vow of obedience to the pope was added:

The Gospel does teach us, and we know from our orthodox faith and firmly hold, that all of Christ's faithful are subject to the Roman Pontiff [...] yet for the sake of the greater humility of our Society and the perfect abnegation of each one of us and the abnegation of our wills [...].¹⁶⁰

The revision of 1550 modified this to read: "Yet for the sake of greater devotion in obedience to the Apostolic See, of greater abnegation of our own wills, and of surer direction of the Holy Spirit, [...]." It was Polanco, now secretary of the Society, who was responsible for the changes because he wanted to avoid the impression that the members of the Society considered themselves to be perfectly mortified. De Aldama indicates that Ignatius later wondered " 'whether it would be proper to question the vow'—a cryptic expression that seems to mean: 'whether it would be proper to justify the vow at all.' " Polanco's suggestion prevailed,¹⁶¹ but this gave rise to another consideration.

¹⁵⁹ Later, the bull *Iniunctum nobis*, (*ConsMHSJ*, 1, pp. 81–86) abrogated the restriction to sixty members, "[...] quoslibet fideles, [...] quotquot fuerint, ad Societatem huiusmodi libere admittere, et eorum Societati huiusmodi, sub votis per Socios eiusdem Societatis emitti solitis, aggregare possint, [...] concedimus," PAULUS III, *Iniunctum Nobis*, 1544, (*ConsMHSJ*, 1, p. 9a) in VALERO, *De legibus*, II, no. 4.1. It also repeated the faculty granted in *Regimini*, to compose the *Constitutions*. GANSS (*Cons.*, p. 76, note 6) points out that *Iniunctum* was dated 14 March, in the year of the Incarnation 1543, "[...] i.e., of the year which had begun the preceding March 25. But this was already 14 March 1544 according to the civil year which had begun January 1."

¹⁶⁰ Trans. by DE ALDAMA, *Formula*, p. 57.

¹⁶¹ See DE ALDAMA, *Formula*, p. 57.

Since justification for the mission vow was not incorporated in the *Five Chapters*, and given the indication that Ignatius was hesitant to include any "justification" at all for the vow, it is probable that the addition was driven by the demands of Cardinal Ghinucci. It is also apparent that the first two reasons offered, those pertaining to humility and abnegation, were spiritually motivated. The addition to the 1550 *Formula*, for "surer direction from the Holy Spirit," however, can be seen as the more "practical," utilitarian and fundamental motivation, since it was the considered incentive which first moved the companions to offer themselves to the pope that he might help determine the field of their apostolic choices.

From a historical viewpoint, it is clear [...] that the third purpose provided the original motivation for the vow. Moreover, it can be argued from the Jesuit tradition of apostolic spirituality that the first two purposes in some way relate to the third and are even subsidiary to it.¹⁶²

Historically, as has been seen, the fundamental purpose of the companions was the pastoral desire to "help souls."

The second set of changes resulted no doubt from the "*stylus curiae*." For instance: "Roman Pontiff" was added to "Vicar of Christ,"; apostolic ministries were clarified by specifying public preaching and confessions; and "when speaking of the vow of special obedience to the pope this clarification was added: 'to whatsoever provinces they may choose to send us'; it is explicitly stated that everything is subject to the good pleasure of the Apostolic See." The third change pertained to the colleges which had recently come into existence, that they, not the Society, would own the income for support of those studying for the Society.¹⁶³

¹⁶² J. O'MALLEY, "The Fourth Vow in Its Ignatian Context: A Historical Study," in *SSJ*, 15-1, (January, 1983), p. 27. This shall be considered more fully in the next Chapter.

¹⁶³ DE ALDAMA, *Formula*, p. 31; see also COEMANS, *Introductio*, nos. 59-62. GANSS, *Cons.*, pp. 78-79, in note 14, points out that the companions imitated mendicant poverty modeled on that of the Franciscans (cf. Chapter 5 of the 1223 *Rule*, in *The Writings of St. Francis of Assisi*, London, B. FAHY, 1964, p. 61), where neither houses nor members could own stable material goods. "Already on June 11, 1539, they reached this 'determination': 'That houses for our habitation or churches will be accepted, but in such a manner that no right of proprietorship is acquired over them; but rather, in such a way that those who will give us use of them may freely take them back whenever they wish, without any contradiction from us. Even more, we should not have any right to litigation for them after they have been abandoned in whatsoever way, even against one lodging a complaint in a manner altogether unjust' (*ConsMHSJ*, 1, pp. xlviii, 13).

Paul III accepted the document, and on 27 September 1540, he solemnly confirmed and canonically erected the Society of Jesus with the bull, *Regimini militantis Ecclesiae*. This included the full text of the amended *Five Chapters*, granting the superior general the authority, with advice of the brethren, to draw up constitutions.¹⁶⁴ It is important to note that since the *Formula of the Institute* or the *rule* of the Society (and its subsequent revision) is contained in a papal document, it is not strictly speaking a document of the Society. Thus, it cannot be changed or altered by any authority within the Society but requires the intervention of the pope himself. It is also interesting to note, as G. Ganss points out, that “[...] the institute of the Society insofar as it is set forth in this *Formula* has papal approval ‘in specific form,’ rather than in the somewhat weaker ‘common form.’”¹⁶⁵

There is an interesting development which can be seen in the comparison between *The Five Chapters* and the *Formula* of 1550. *The Five Chapters* reads:

This superior general with the advice of the brethren, shall possess the authority, in council (a majority of votes always having the right to decide), to draw up constitutions leading to the achievement of this end which has been proposed to us.¹⁶⁶

The 1550 version modifies this slightly but makes an important addition that the superior general “[...] shall also have the authority to explain officially doubts which may arise in connection with

This prohibition of any right to proprietorship over stable goods was incorporated into the *Prima ...Instituti Summa* [5] and *Regimini* [6]. But experience showed the need of some change, which came in the exception granted by *Exposcit* [5]: Neither the professed nor their houses or churches may ‘acquire any civil right to [...] stable goods (except those which are proper for their own use and habitation).’ Hence proprietorship over such stable goods is permitted.”

¹⁶⁴ *Regimini*, in *ConsMHSJ*, 1, pp. 24-32. Because of the small changes made, the bull, *Regimini*, is actually the second draft of the *Formula*. The content of the *Formula of the Institute*, strictly interpreted, is found in paragraphs [3-8] of *Regimini*, and [3-6] of *Exposcit*, “to which these popes added their respective introductions and concluding approval” (GANSSE, *Cons.*, p. 64, note 4). The authority to draw up *Constitutions* is found in *Regimini*, [3,9] (in *ConsMHSJ*, 1, pp. 27, 31).

¹⁶⁵ See note 9 above, and COEMANS, *Introductio*, no 50; and *EpitInstSJ*, 5, §2. Cf. also P.-H. LAFONTAINE, “Nature de l’approbation de nos Règles,” in *Etudes Oblates*, 6 (1947), pp. 91-116; F. J. URRUTIA, “Quandonam habebatur approbatio «In forma specifica.»” in *Periodica*, 80 (1991), pp. 3-17.

¹⁶⁶ See the text in Appendix VIII.

our institute as comprised in this *Formula*.”¹⁶⁷ De Aldama points out that “The specific approval of the *Formula* made it pontifical law, which can only be interpreted by the Holy See, unless—as happens in this case—someone is granted power to interpret it.”¹⁶⁸ There are several subsequent documents which affirm the power of the Society to interpret the *Constitutions*, but there are none to be found which abrogate this power which was granted in 1550 to interpret the *Formula of the Institute*.

On 2 April 1541, the companions remaining in Rome met to elect a superior general. Not surprisingly the name of Ignatius appeared on all ballots except his own, but pleading ill health and past sins he refused to accept. When a second election produced the same results, Ignatius, under great pressure from the companions and only after taking advice from his confessor, Fra Teodosio, finally accepted on 19 April.¹⁶⁹ On 22 April the companions assembled at the church of St. Paul’s Outside the Walls, where they made their religious profession. They used the occasion of this gathering to elucidate some issues of the Institute that had not been considered or which needed clarification. These points, though regarded by them as only provisional, are referred to as “The *Constitutions* of 1541.”¹⁷⁰ Recognizing that it would be difficult to be available to consult on the further preparations of the *Constitutions*, they decided to leave the task to the judgement of those who remained in Italy. Eventually, since even this was not so easy, the duty fell to Ignatius with the assistance of Codure, who died, however, in August of 1541. The work proceeded slowly.

¹⁶⁷ The Latin reads: “[...] et quae dubia esse poterunt in nostro instituto hac formula comprehenso, declarandi auctoritatem habeat” (in *ConsMHSJ*, 1, p. 376).

¹⁶⁸ DE ALDAMA, *Formula*, p. 51.

¹⁶⁹ CLANCY, p. 56.

¹⁷⁰ The work can be found in *ConsMHSJ*, 1, pp. 34–38. Cf. A. M. DE ALDAMA, *The Constitutions of the Society of Jesus: An Introductory Commentary on the Constitutions*, (trans. of *Iniciación al estudio de las Constituciones*, (= DE ALDAMA, *Cons.*), Rome, CIS, 1979) A. J. OWEN, trans., St. Louis, IJS, 1989, p. 3.

In March 1547 when Ignatius named Juan Alfonso de Polanco secretary and procurator general, and the administrative pace intensified.¹⁷¹ Along with the ordinary government of the Society, and work on the *Constitutions*, during the next three years at least six more revisions of the *Formula* were made.¹⁷² The revised *Formula* was confirmed on 21 July 1550 by Julius III in the bull *Exposcit debitum*, in which the pope states again that the new *Formula* “expresses the Society’s institute more accurately and clearly ‘because of the lessons learned through experience and usage, but in the same spirit.’”¹⁷³

3. Revisions of the *Formula of the Institute*

De Aldama groups into four categories the approximately one hundred changes that were made in the *Formula*:

Some are due to the desire to have a fuller and more accurate exposition of various aspects of the institute, such as its aim and means, the powers of the general congregation and the superior general, the purpose of the colleges, the priestly character of the Society. [...] Others take note of developments that had taken place since 1540, regarding three points mainly: poverty, the admission of coadjutors, and the appointment of subordinate superiors. The third group consists of permissions sought: to interpret the *Formula*, to open colleges where there is no university, and to consider these colleges as established through the

¹⁷¹ Polanco was a former papal civil servant, had studied theology in Paris, and canon law in Bologna. DE ALDAMA, *Cons.*, p. 4 says this: “Polanco was possessed of a mind that was clear, precise, and apt both for analysis and synthesis, quick to seize the implications of a situation or a doctrine, prodigiously methodical and good at organizing, not very original—though by this fact all the more capable of assimilating the ideas of others. [...] his contribution was of such significance that it has given rise to the delicate and disquieting question of how much of the work is due to the founder and how much to the secretary.” CLANCY, p. 61, points out as a testament to Polanco’s organizational ability that prior to his arrival Ignatius had written 173 letters; after, in the last nine years of his life, there were more than 7,000.

¹⁷² The first and second revisions included suggestions made for the Institute, with the second series based on rules and constitutions of other communities. In the third and fourth series Polanco copied out each point, and below each he made remarks and posed questions. Answers given by Ignatius were added by Polanco and the final solutions written in Ignatius’ own hand. The fifth series resulted from a consultation with Egidio Foscarari, regarding the account of conscience, and the sixth series incorporated the suggestions of canorists consulted by Ignatius. Cf. *ConsMHSJ*, 1, p. 45 ff. See DE ALDAMA, *Formula*, pp. 32–33.

¹⁷³ *ConsMHSJ*, 1, 373–383. See DE ALDAMA, *Formula*, p. 33.

authorization of the Holy See. Finally, some changes were made to avoid disedification, e.g., explaining the reason why the vow of obedience to the pope is made.¹⁷⁴

Several of the above points need some explanation.

The Five Chapters listed the aim and means of the Society as follows:

He [a Jesuit] is a member of a community founded chiefly for this purpose: to strive especially for the progress of souls in Christian life and doctrine and for the propagation of the faith by the ministry of the word, by spiritual exercises, by works of charity, and expressly by the education of children and unlettered persons in Christianity.¹⁷⁵

The 1550 version of the *Formula* expanded this to read:

[...] the Society, [is] instituted for this end above all:
 — to devote itself to the defense and propagation of the faith and the advancement of souls in Christian life and doctrine;
 — and equally to the reconciliation of adversaries and to the religious assistance and ministry to those who are in prisons or in hospitals, and to carry out all other works of charity as may seem expedient for the glory of God and the common good.¹⁷⁶

The principal means to attain these ends were cited as:

[...] through preaching, lectures, and any other ministry of the word of God, and giving the *Spiritual Exercises*, instructing children and uneducated persons in Christianity, hearing the confessions of the faithful and administering the other sacraments, [the Society] aims above all at giving spiritual consolation.¹⁷⁷

¹⁷⁴ DE ALDAMA, *Formula*, pp. 32-33.

¹⁷⁵ DE ALDAMA, *Formula*, p. 2. See Appendix VII for the Latin.

¹⁷⁶ *Formula*, [1]; IULIUS III, *Exposcit debitum*, 1550; *ConsMHSJ.*, 1, p. 23b; in VALIERO, *De legibus*, II, no. 2.2. See also DE ALDAMA, *Formula*, p. 40. In his thorough analysis of Chapter One, (pp. 37-54) he pointed out that in the 1550 version the word "defense" was added, and that the order of the aims is changed from what appeared in previous versions as, "the progress of souls and the propagation of the faith." De Aldama suggests that this might be because they focused originally on the fact that they, "did not know into which regions they were to go, whether among the faithful or the unbelievers."

¹⁷⁷ *Formula*, no. 1, IULIUS III, *Exposcit debitum*, 1550, *ConsMHSJ.*, 1, p. 23b; in VALIERO, *De legibus*, II, no. 3.3.

De Aldama points out that the aims and means of the Society can be summed up in the single word “evangelization,” and that these aims coincide with those found in Paul VI’s *Evangelii nuntiandi*.¹⁷⁸

4. Coadjutors

The second clarification pertains to “the admission of coadjutors.” Originally it was envisioned that the Society was to consist of priests and those in formation. As demands increased for “more workers in the vineyard of Christ,” Ignatius responded with great creativity. Since it would be some time before those in preparation were ready to meet the apostolic demands, he sought permission from Pope Paul III to allow some secular priests to assist the work of the Society by celebrating Mass, hearing confessions, teaching catechism, etc. Although many of these men lacked the education required, especially the theological training, and due to age or aptitude held little promise of obtaining it, many desired to enter the Society. Six years after *Regimini*, the papal bull *Exponi Nobis* of 5 June 1546, confirmed in *Exposcit debitum* of 21 July 1550, allowed for this new class of priests¹⁷⁹ which Ignatius called “spiritual coadjutors,” as well as lay brothers, “temporal coadjutors,”¹⁸⁰ to help in temporalities.

The two classes or “grades” of priests were distinguished primarily by those who took the fourth vow and those who did not. The “professed” fathers would pronounce four solemn

¹⁷⁸ DE ALDAMA, *Formula*, pp. 43, 44, 45, and again on 47. *Evangelii nuntiandi*, in *AAS*, 68, (1976), pp. 5-76. It shall be noted in a later Chapter how the aims and structures of the Society, developed with “mission” in view, lend themselves to the developing understanding of “evangelization” in the Church.

¹⁷⁹ “[...] We grant you leave and permission henceforth to be able to use Priests to assist you in spiritual matters, and lay persons in temporal matters and in your domestic duties:” PAULUS III, *Exponi Nobis*, 1546, *ConsMHSJ*, 1., p. 12a. See the Latin in Appendix VI; VALERO, *De legibus*, II, nos. 2.2, 13.1.

¹⁸⁰ O’MALLEY, *The First Jesuits*, pp. 60-61, indicates that in the sixteenth century temporal coadjutors comprised about 25 percent of the membership of the Society. They generally had or acquired some practical skill, received little or no humanistic education, and would not become superiors. Cf. T. V. COHEN, *The Social Origins of the Jesuits, 1540-1600*, PhD Diss., Harvard Univ., 1973, vol. 1, pp. 58, 214, 241.

vows, including the mission vow, along with several "simple vows of the solemnly professed."¹⁸¹ Only they could hold major office in the Society, and only priests could profess the fourth vow.¹⁸² The spiritual coadjutors would pronounce three simple vows, but not the mission vow.¹⁸³ This innovation on the part of Ignatius has been the cause of much discussion, especially recently when it was strongly argued that Ignatius intended the grade of spiritual coadjutor as only a temporary measure which would fade out of existence as soon as enough scholastics were "fully formed."¹⁸⁴

But even earlier it was questioned whether those in "simple" vows were true religious.¹⁸⁵ This was eventually solved by Gregory XIII who said:

[...] We ordain and decree [...] that all others also and whoever are admitted to the Society after completing the two-year probation and have taken or will take in the future the three aforesaid vows, even though simple, have been and are

¹⁸¹ The "simple vows of the solemnly professed" can be found in Appendix II.

¹⁸² "*Socii autem omnes, cum Presbyteri esse debeant,*" *Formula*, no. 8; IULIUS III, *Expiscit debitum*, 1550, *ConsMHSJ.*, 1, p. 26a; cf., GREGORIUS XIII, *Ex Sedis Apostolicae*, 1573, *ConsMHSJ.*, 1., p. 54b; in VALIERO, *De legibus*, II, no. 6.1.

¹⁸³ Cf. D. A. BROWN, *The Origins of the Grades in the Society of Jesus: 1540-1550*, *Excerpta ex diss.*, Roma, ad Lauream in Facultate Iuris Canonici, Pontificiae Univ. Gregorianae, 1971, 121 p.; G. DUMÉIGE, "Gradus in Societate Iesu iuxta S. Ignatium de Loyola necnon iuxta posteriorem evolutionem historicam," F. J. URRUTIA, trans., in *Periodica*, 80 (1991), pp. 265-309; and the excellent study by L. LUKÁCS, "De graduum diversitate inter sacerdotes in Societate Iesu," (= LUKÁCS), in *AHSJ*, 37 (1968), pp. 237-316. A discussion of grades will take place in a later Chapter.

¹⁸⁴ See LUKÁCS. The events of the Thirty-Second General Congregation when the Society attempted to extend the mission vow to all members of the Society will be discussed in a later Chapter.

¹⁸⁵ BANGERT, pp. 112-113, summarizes a dispute concerning the Society which lasted over ten years, initiated in 1582 by four Dominicans, "Bañes [a Dominican], [...] championed the proposition that, since it is the profession alone which makes one a religious, the spiritual and temporal coadjutors of the Society were outside the religious state. [...] Peredo attacked the simple vows pronounced at the conclusion of the novitiate, teaching that the individual who pronounces these vows remains a layman who by study and pious exercises disposes himself to one day enter the Society. On 1 February 1583, Pope Gregory XIII in his bull *Quanto fructuosius* rejected Peredo's contention. The Dominican claimed that Gregory was speaking as a private doctor and not as Supreme Pontiff. The pope removed all doubts about his approval of the Jesuit *Constitutions* by another and even more explicit bull, *Ascendente Domino*, of 25 May 1584. Peredo retaliated with the charge that this bull was not issued in correct form. This allegation was rejected by the Holy Office. The open hostility to the Society's organization ceased only with the royal decree of 4 February 1595, insisting that peace must prevail between the two orders."

truly and properly Religious, and are everywhere and at all times to be considered and called so by all, just as if they had been enrolled among the aforesaid professed.¹⁸⁶

In the sixteenth century, before the French Revolution helped give rise to “congregations” with simple vows, this recognition of simple vows was novel enough. But, more importantly, this document of Gregory’s rendered to the simple vows of the Society the same effects as solemn vows.¹⁸⁷

A further peculiarity unique to the Society is the nature of the “conditional” vows under which the coadjutors were admitted:

[...] those who are admitted as Coadjutors, in spiritual as well as temporal matters, after sufficient testing and the time indicated in the *Constitutions*, are to take vows for the sake of their devotion and greater merit; not indeed solemn vows, [...] but by which they are bound as long as the superior general deems that they should remain in the Society (as is explained more fully in the *Constitutions*) [...].¹⁸⁸

These conditional vows are distinguished from temporary vows in that they are perpetual on the part of the one who makes them, but not on the part of the Society. In practice, however, it could be argued that, even before the simplifications introduced by the 1983 *Code of Canon Law* with

¹⁸⁶ GREGORIUS XIII, *Quanto fructuosius*, 1583, *ConsMHSJ.*, 1., pp. 89b-90a; in VALERO, *De legibus*, no 20.

¹⁸⁷ Historically, acts contrary to a simple vow were considered illicit, acts contrary to a solemn vow were considered invalid. The *CIC 17* incorporates this notion in c. 1073 which noted that an attempted marriage of one in solemn vows, and, by special indult (this one by Gregory), those in simple vows in the Society of Jesus, was invalid. This is replaced in the *CIC 83* by c. 1088 which says that “Those who are bound by a public perpetual vow of chastity in a religious institute invalidly attempt marriage.” In the *CIC 17* the heart of the distinction with regards poverty was cited in cc. 579-580. Those in simple vows could retain ownership of property and the right to acquire more property, unless the constitutions declared otherwise. Those in solemn vows lost the right to own or possess temporal goods. The *CIC 83* simplifies this somewhat in c. 668, but in §§ 4 and 5 retains an echo of the effects of solemn vows in the phrase “When the nature of the institute requires members to renounce their goods totally [...],” as is the case of those who make final, simple vows in the Society.

¹⁸⁸ *Formula* no. 9; IULIUS III, *Exposcit debitum*, 1550, *ConsMHSJ.*, 1, p. 26b; in VALERO, *De legibus*, no. 14.2.

regard to the effects of solemn and simple vows, the "final, simple" vows of coadjutors *tacitly* ceased to be conditional upon definitive incorporation into the Society.¹⁸⁹

Later, the *General Examen* would provide for several "grades," or distinctions of membership in the Society: the professed; spiritual coadjutors; temporal coadjutors; approved scholastics, "who upon completing their two years of novitiate, have taken simple but perpetual vows of poverty, chastity and obedience, along with a promise to become full members of the Society as professed or spiritual coadjutors after their studies are completed";¹⁹⁰ and indifferents, who leave it to the judgement of their superiors whether they will be invited to become priests or temporal coadjutors. In practice the distinctions are: the professed; the spiritual coadjutors; the temporal coadjutors; and the scholastics, who are usually in priestly formation and later called by the Society to accept either of the first two grades. Indifferents are now admitted only rarely if at all.

5. The Mission Vow in the Revised *Formula*

The final clarification to be considered in the revised *Formula* pertains to the mission vow. *The Five Chapters* of 1539 contained the following:

All the companions should know and daily bear in mind, not only when they first make their profession but as long as they live, that this entire Society and each one individually are campaigning for God under faithful obedience to His Holiness Paul III and are thus under the command of the Vicar of Christ and

¹⁸⁹ See the previous Chapter for the notion of a *tacit* vow.

¹⁹⁰ GANSS, *Cons.*, [10] ff. See also his note 20, p. 81. The first vows of the Society are perpetual on the part of the one who makes them, but conditional on the part of the Society, which retains the right to dismiss those it finds to be unsuitable for final incorporation. One is invited by the Society to make final vows after the completion of "tertianship," or the "third year of probation," which is the final, formal stage of formation in the Society. In rare cases Spiritual and Temporal Coadjutors can be invited to pronounce three solemn vows, known as the *Professed of Three Vows*. In the language of Ignatius "profession" always means solemn vows. On the grades of membership see *ConsMHSJ*, 2, pp. cxxviii-cxxix; DUDON, pp. 292-293. To hold major office in the Society one must be *Professed of Four Vows*. Cf. also J. BEYER, "De votis in Societate Iesu condicionatis," in *Periodica*, 80 (1991), pp. 187-218; and M. R. JURADO, "Peculiaritatis instituti a Sancto Ignatio de Loyola conditi," in *Periodica*, 80 (1991), pp. 332-414.

his divine power not only because we are bound by the obligation common to all clerics, but also by the vow we make to carry out without subterfuge or excuse and at once (as far as in us lies) whatever His Holiness may order pertaining to the progress of souls and the propagation of the faith, whether he decides to send us among the Turks, or to the New World, or to the Lutherans, or to any others whether infidels or faithful.¹⁹¹

The *Formula* of 1550 reads:

All who make profession in this Society should understand at the time and furthermore keep in mind as long as they live, that this entire Society and the individual members who make their profession in it are campaigning for God under faithful obedience to His Holiness Pope Paul III and his successors in the Roman Pontificate.¹⁹²

Attention must first be drawn to the exhortation that the *entire* Society is missionary in character. Even though changes are introduced in 1550 to account for the addition of coadjutors: “all the companions [...]” of *The Five Chapters* is changed to “all who make profession [...]”; and “[...] each one individually [...]” becomes, “[...] the individual members who make their profession [...]”; yet “[...] this entire Society [...]” is retained in both versions. This observation is shared by de Aldama who says:

The distinction between ‘this entire Society and the individual members’ can be read as indicating that it is not yet referring to the obligation that binds the professed in virtue of his special vow but to a wider obligation affecting the Society as such. The Society is ‘campaigning for God,’ i.e., lives its religious commitment ‘under faithful obedience’ to the pope. At that time religious were not considered to be subject to the pope in virtue of the common vow of obedience, as to the highest superior of all religious orders, but only in virtue of his universal jurisdiction as the Supreme Shepherd of the Church. Hence, to say that the whole Society lives its religious commitment under obedience to the pope

¹⁹¹ Trans. by DE ALDAMA, *Formula*, pp. 6 & 8.

¹⁹² DE ALDAMA, *Formula*, p. 7. “Quicumque autem in hac Societate professionem emisierint, non solum in primis professionis suae foribus intelligant, sed quoad uixerint, memores sint, Societatem hanc uniuersam et singulos qui in ea profitentur, sub Sanctissimi Domini Nostri Pauli Papae Tertii et aliorum Romanorum Pontificum successorum eius fideli obedientia, Deo militari” (in *ConsMHSJ*, 1, p. 377).

is tantamount to stating a peculiar kind of dependence, not common to the other religious orders.¹⁹³

This “[...] peculiar kind of dependence [...]” is precisely what the companions intended with the papal section of the Montmatre vows, carried out by offering themselves to the pope, motivated them to hold the *Deliberations*, and expressly safeguarded in their founding documents.

The phrase, “not only because we are bound by the obligation common to all clerics,” indicates that they were aware that the formal object of this mission commitment was different from that imposed upon them by their priesthood and even by their evangelical vow of obedience. The text itself helps to clarify that: “[...] when he makes this vow, the professed of the Society binds himself to obey the pope in the matters that pertain to the aims of his vocation, which is evangelization.”¹⁹⁴ Specifically, the *Five Chapters* identifies this obedience with regard to “[...] whatever His Holiness may order pertaining to the progress of souls and the propagation of the faith.” But it goes on to limit or specify this reference to the aims for which the Society was founded by adding the nuance “[...] whether he decides to send us among the Turks, or to the New World, or to the Lutherans, or to any others whether infidels or faithful.” As de Aldama points out:

These words would have made no sense if the vow encompassed the entire field of obedience. The reason for adding them could only have been to give greater precision to the object of the vow, left somewhat vague in the previous phrase. Nadal realized this and wrote: ‘the “and” is explanatory, because this vow refers only to the missions.’¹⁹⁵

¹⁹³ DE ALDAMA, *Formula*, p. 56. See CIC 83, c. 590 §2, “Singuli sodales Summo Pontifici, tanquam supremo eorum Superiori, etiam ratione sacri vinculi oboedientiae parere tenentur.” The limits of the mission vow will be addressed in a later Chapter

¹⁹⁴ DE ALDAMA, *Formula*, p. 60.

¹⁹⁵ DE ALDAMA, *Formula*, p. 60. The reference to Nadal can be found in *ConsMHSJ*, 1, p. 10, no. 1. In this section I am grateful for the work of DE ALDAMA, p. 55 ff., who offers an excellent analysis organized according to the spirit of the vow, the reasons for making it, and its modality.

His argument is extended by pointing out that “[...] the first Fathers made the vow to obey the pope not in whatever he might command, but ‘regarding the missions contained in the bull, [...].’ ” It is opportune to recall that at the *Deliberations* one of the motives identified for making an evangelical vow of obedience was to deal with the details of daily life so that the primary missions—those received from the pope—could be undertaken.

In the *Formula*, there are further instructions and clarifications regarding how the vow is to be observed and carried out. It is the *Constitutions*, however, which were expressly written to clarify and further specify the *Formula*. It is to them that one must turn to understand the intention of the Society regarding these issues, for it is there that the Society carries out the power granted to it “to explain officially doubts which may arise in connection with our institute as comprised in this *Formula*.”¹⁹⁶

¹⁹⁶ *ConsMHSJ*, 1, p. 376, noted above.

Summary

Iñigo López de Loyola was born of a noble Basque family in 1491, and received the education appropriate to his class. But while recuperating from an injury sustained during a military campaign in 1521, he began the experience of a profound religious conversion which set him, for the rest of his life, on a pilgrimage to seek and to do the will of God. Having exchanged clothes with a beggar and his sword for a staff, and after an all-night vigil-at-arms before the Lady of Montserrat, he set off on a personal penitential pilgrimage to the Holy Land. On the way, he delayed for some eleven months at Manresa where he underwent what he called his “primitive church.” Like the desert fathers before him, he retired to a cave where after severe trials he received great mystical graces which he organized into the notes which would become his *Spiritual Exercises*. In Manresa he discovered the apostolate, a new motive force for his life. He desired “to help the souls that Christ had redeemed with his precious blood,” and the pilgrimage became for him a mission.

After the disappointment of being expelled from the Holy Land he did not know what to do, but with much soul-searching he decided to pursue studies enabling him the better to help souls. These years, first in Spain and finally in Paris, marked another decisive turning point with the decision, probably taken in Barcelona, “to gather some others with the same resolve”—to help souls. This group of “friends in the Lord” eventually decided to formalize their common desire. After much prayer and discussion they gathered at Montmartre in 1534 where they vowed to go to Jerusalem, and if this were not possible, to present themselves to the pope that he might send them wherever he thought they would most benefit their neighbour for “the glory of God.”

During the next year they were busy with various apostolic works, attracted additional companions, received holy orders, and decided that if asked they would identify themselves as the “company of Jesus.” Transportation to Palestine was not possible so they turned their sights

to Rome. On the way, Ignatius received an important vision at La Storta in which the Father placed Ignatius with Christ, and said "I will that you serve us." Ignatius interpreted this to confirm that the group should be dedicated to Christ and bear His name. Pope Paul III accepted their offer of service and acquainted himself with the group by inviting them to carry on theological discussions in his presence.

In Rome the companions distinguished themselves by performing outstanding works of charity with the poor, the hungry, the marginalized, and the unlettered. Various requests were made for them to serve in different places, but when the pope decided to send them on missions they realized they would soon be separated. This concern led to the *Deliberations of the First Fathers* where two questions were resolved: whether they should organize into a body; and if so, what form should it take. Many issues were clarified during these meetings which lasted throughout the Lent of 1539. They determined to preserve their union and to vow obedience to one of their own number, but they expressly did not wish to compromise the unique purpose and "way of proceeding" which they judged themselves to have received from God.

The next task was to make the decisions which would frame the first sketch or rule of the institute they wished to begin, and to seek its approval from the pope. Chief among their concerns was that anyone who entered the Society should make a vow of obedience to the pope, offering to go anywhere he sent them for the help of souls, and that all who entered should be available for mission. They produced *The Five Chapters*, which in September of 1539 received the oral approval of Pope Paul III. But some, highly placed in Rome, felt that the nature of the apostolic institute proposed in the document was too great a departure from the traditional "monastic" understanding of religious life. After compromise and revision, the *Formula of the Institute* was accepted by Paul III, and the Society of Jesus was approved in *forma specifica* with

the papal bull, *Regimini militantis Ecclesiae*, of 27 September 1540. Ignatius was elected the first superior general.

Over the next ten years, circumstances and experience contributed to further refinements and clarifications. For instance, the aims of the Society and the means to achieve them were sharpened; internal structures were determined; institutions and schools were organized; coadjutor members were admitted with conditional simple vows; and the mission vow was further elucidated. Under the authority which the Society had been granted in *Regimini*, work continued to clarify the *Formula* and to write the *Constitutions*, and in 1550 Julius III promulgated the final version of the *Formula* in the bull, *Exposcit debitum*.

Several questions still need to be addressed. How do the two vows of obedience in the Society relate to each other? Is there a difference between the obedience of the professed and that of the coadjutors? What is the nature of the authority of the pope and of the superior general of the Society? Are there juridical limits which affect the authority of either the pope or the superior general? In the next Chapter, through a consideration of the *Constitutions*, the ground work will be laid so that these concerns may be addressed.

CHAPTER THREE

OBEDIENCE IN THE SOCIETY OF JESUS

This Chapter will be divided into three parts. Part I will present a general introduction to the *Constitutions*. Part II will examine those sections of the *Constitutions* which deal with the fourth vow, the vow of special obedience to the pope with regard to missions. Part III, also with the assistance of the *Constitutions*, will consider the third vow, the evangelical vow of obedience. It will be helpful to see the fourth vow before the third vow for three reasons: (1) The resolution to place themselves at the feet of the pope was chronologically the first commitment made by the companions, and, in general, later decisions were made to assist in carrying out this mission vow, including the decision to vow obedience to one of their own number; (2) In *The Five Chapters*, the first sketch of the *rule* of the Society, the fourth vow was discussed in Chapter 2, and the third vow in Chapter 3; (3) Also, after some issues related to poverty, the section which deals with the fourth vow was the first and the earliest Part of the *Constitutions* drafted by Ignatius.

PART I: Introduction to the *Constitutions*

Several observations are necessary before consideration is given to the innovative and original contributions made to the evolution of religious life by the documents and structure of the Society of Jesus. The pattern that Ignatius' life followed is in many ways mirrored in the development of the religious community he created. Ignatius did not set out to found or develop an institute in the Church, but at each stage of his life, he responded to the promptings of the Spirit acting on his "soul." The *Spiritual Exercises*, at first Ignatius' own spiritual diary, later were shaped and formed to make them and the fruits of their methodology accessible to others

who desired to approach God along the same path. "One cannot read the *Constitutions* without reference to the *Exercises*. The latter are the basis and presupposition of the former."¹ The impact of the *Exercises*, not only on the formation of the hearts and minds of individual Jesuits, but also their influence, even on the structuring and "way of proceeding" of the entire institute, cannot be overstated.

When Ignatius finally arrived at the writing of the *Formula of the Institute* and the *Constitutions*, he desired to preserve in the Society the integrity of the experience of the Spirit which brought him to those events.

U. Valero points out:

Thus, in St. Ignatius' mind, the order of things is as follows. (1) In the first place stands the Society's end; this constitutes its reason for existing, transcends it, and orients all its activities; it is conceived as the divine service or the divine glory in the help of souls and the good of its members. (2) In second place is the Society itself, whose preservation, proper functioning, and increase must be sought in order to assume the attainment of its end. (3) In third place is the action of the Spirit, who writes and engraves upon the hearts of the Society's members the interior law of charity and love, and who moves them to the fulfillment of the Society's end and guides them therein, bestowing their meaning and efficacy upon all human laws or norms. (4) In fourth place, finally, are the *Constitutions, as a means—a "help"—for this preservation, good functioning, and increase; this they effect by cooperation with the primary action of God*, which is what creates and maintains the Society in being. The *Constitutions*, then, are the human contribution of the Society and its members, indispensable in the incarnational order, so that the Society can attain the end set before it by divine providence.²

To this ranking of the place of the *Constitutions* in the life of the Society the interpretative norm offered by J. Nadal must be added, that one should read the *Constitutions: spiritu, corde, practice*:

¹ J. THOMAS, *Constitutions: A Pathway to God*, a brief paper published by the Jesuit General Curia, June, 1994, in preparation for the Thirty-Fourth General Congregation, p. 2.

² U. VALERO, "Reflections on the Meaning and Significance of Law in the Life of the Society," Rome, 1992, a private paper used with permission, p. 3. Emphasis is Valero's.

Spiritu, 'with the spirit'—rising from the letter to the spirit which animated Ignatius as he wrote. This is not to bypass the legal norms but to see them as informed and animated by the spirit which gives them their true meaning.

Corde, 'with the heart'—opening the heart to the teachings of the men whom God has given as a guide on this 'road to Him.' This should be with a sensitivity rendering us able to receive the imprint of his spirit; and with spiritual devotion, enabling us to 'experience interiorly' the invitations that the grace of our vocation makes to us through the *Constitutions*.

Practice, 'with a view towards practice'—directing our reading towards practice, towards *living* the *Constitutions* and being transformed into the Gospel image of Jesus Christ which Ignatius contemplates in the *Spiritual Exercises* as the ideal of his life, which he was able to communicate through the Exercises to his companions—and which he left to us in the form of the *Constitutions* that it might also be the supreme ideal of our consecrated life.³

Nadal's statement is to be viewed as more than just pious since it can be interpreted as the most characteristic "way of proceeding" of the Society.

1. Composition of the *Constitutions*

It is important to note that in Jesuit usage, "[...] the word '*Constitutions*' does not have a single meaning." Under the cover of what is generally known as the *Constitutions* there are actually four books included which have equal juridical value:

1. the *Examen*
2. the *Declarations on the Examen*
3. the *Constitutions* properly so called
4. the *Declarations on the Constitutions*⁴

The *General Examen*, (*Primero examen y general*) composed around 1546, is intended as an aid to those considering entrance into the Society, and to assist those who examine and explain the Society to those who make inquiries. In eight Chapters (forty-eight pages, folios 2r to 26v), it

³ A. M. DE ALDAMA, *The Constitutions of the Society of Jesus: An Introductory Commentary on the Constitutions* (= DE ALDAMA, *Cons.*), (trans. of *Iniciación al Estudio de las Constituciones*, Rome, CIS, 1979), A. J. OWEN, trans., St. Louis, IJS, 1989, p. xviii. Cf. *Mon Nad*, 5, pp. 227-231, and Nadal, *Pláticas*, pp. 43-45; also O'MALLEY, *The First Jesuits*, (= O'MALLEY, *The First Jesuits*), Cambridge, Mass. and London, Harvard Univ. Press, 1993, p. 371 ff., for his reflections on this passage of Nadal.

⁴ DE ALDAMA, *Cons.*, p. 1.

delineates the aims and manner of living of the Society. As Ganss points out, "If taken strictly, the title of *General Examen* applies only to Chapters 1–4, for Chapters 5–8 are particularized Examens for distinct classes of applicants."⁵ The *Declarations on the Examen* (ten pages, folios 28r to 33v), "[...] is a collection of authoritative explanations of the related phrases or passages of the Examen."⁶ The *Constitutions* (eighty pages, folios 28r to 99v), in ten Parts, is the primary expansion and "further determination" of the *Formula of the Institute*, the *rule* of the Institute, and treats of:

[...] the individual members, their admission, formation, definitive incorporation into the Society, and application to its works (Parts I–VII), then of their relations among themselves and with their head or superior general (Part VIII), then of the general himself (Part IX), and lastly of the body of the Society as a whole and of its preservation and development (Part X).⁷

The *Declarations on the Constitutions* (ninety-eight pages, folios 100r to 149v), "[...] having equal binding force with the *Constitutions*, were to descend more to details, by giving, especially to superiors, particular applications or explanations."⁸ As was observed earlier, the first document, the *Formula of the Institute*⁹ established the basic structure of the Society and

⁵ *The Constitutions of the Society of Jesus*, G. GANSS, trans., intro., & commentary, (= GANSS, *Cons.*, or *Cons.*), IJS, St. Louis, 1970, p. 37. Unless otherwise noted, all quotations from the *Constitutions* will be from this edition. GANSS, *Cons.*, p. 39, points out that the edition of the *Constitutions* published in Rome in 1949, *Societatis Iesu Constitutiones et Epitomes Instituti*, followed the long established practice of printing the *Declarations on the Constitutions* integrated into the texts they clarified. Each paragraph of the four works was assigned a number in square brackets. "Thus the more cumbersome ancient references, such as *Constitutions*, Part IV, chapter xiii, number 2, *declaration A*, lengthy even in its abbreviation as *Cons*, P.4,c.13,n.2,A, can be cited simply as *Cons*, [445]." This system, which this study shall follow, is now so widely used there is little or no need for another method of citation.

⁶ GANSS, *Cons.*, p. 37. In his text Ganss italicises the *declarations*. This work will follow his example.

⁷ GANSS, *Cons.*, p. 37. Cf. also A. COEMANS, *Introductio in studium instituti et annotationes in formulam instituti*, (= COEMANS, *Introductio*), Brussels, 1937, nos. 78–83.

⁸ GANSS, *Cons.*, p. 38. The *declarations*, Ignatius' own explanations of the points of the *Constitutions*, are often longer than the passages they amplify, and they refer to the Constitution number by using proper letters, A, B, C... The *Constitutions* were intended to be more perduring than the *declarations*.

⁹ Chapter Two pointed out that the *Formula of the Institute* was initiated at the *Deliberations of the First Fathers*, written into *The Five Chapters* of 1539, confirmed in *Regimini* of 1540 and again in *Exposcit debitum* of 1550, which granted to the superior general, "[...] authority to explain officially doubts which may arise in connection with our institute as comprised in this *Formula*" (cf. *ConsMHSJ*, 1, p. 376).

authorized the superior of the new order to write “[...] more detailed statutes or determinations called *Constitutions*. In modern editions of Ignatius’ *Constitutions*, the present one included, the *Formula* is fittingly printed as a kind of preface to them.”¹⁰

As to the manner in which the *Constitutions* were written, Ignatius himself indicated that he was aware that he could proceed in two possible ways:

He could write according to the order of logical thought, which first sets forth the end and then treats the means to attain it, or according to the order of execution, which treats step by step the means to attain the end and then sets forth the end or finished product as a kind of résumé. He chose this latter procedure [...].¹¹

Of the organization J. O’Malley says:

The Jesuit *Constitutions* broke new ground in the rationalized structure of their organization, in the psychological undergirding of their development from Part to Part, in their attention to motivation and general principles, in their insistence in particular and in general on flexible implementation of their prescriptions, in having an implicit but detectable theological foundation, and in conveying a sense of overall direction. They had a beginning, middle, and end.¹²

While the order was very practical, Ignatius did not intend to exhaust any particular theme in one place, thus, for a comprehensive concept of his treatment of a topic, one must assemble the passages that touch upon it.¹³

The Jesuit *Constitutions* are considerably longer than those of most other orders.

Accounting in part for the length [of the *Constitutions*] was the attention given to issues like the education of the members of the Society and the institutions responsible for it, treated much more briefly, if at all, in correlative documents of other orders.

¹⁰ GANSS, *Cons.*, p. 36 ff.

¹¹ GANSS, *Cons.*, p. 37. See also DE ALDAMA, *Cons.*, p. 11.

¹² O’MALLEY, *The First Jesuits*, p. 337.

¹³ See GANSS, *Cons.*, p. 38. For example, the *Examen* [3] clearly states the end of the Society, but the *Constitutions* [156, 163, 258, 307, 308, 446, 586, 603, 813], rather than repeat it, clarify and enrich the concept.

Also accounting for the length were the many qualifications that hedged almost every principle. While protracting and complicating the text, the qualifications lent the document a flexibility that stood it in good stead, a flexibility in accord with the essentially missionary character of the order that was clear from the beginning. The *Constitutions* explicitly prescribed 'moderation'—*moderatio, mediocritas*—as the principle according to which they were to be interpreted, neither with 'extreme rigor' nor 'extreme laxity.'¹⁴

This flexibility resulted, no doubt, from Ignatius' reflection on his own spiritual journey, a presumption that other Jesuits likewise would experience personal and spiritual growth, and his awareness that ministerial, pastoral circumstances often required particular, creative solutions.¹⁵

The *Monumenta* indicates that three categories of documents influenced the development of the *Constitutions*, "the documents of the early companions;¹⁶ documents from Ignatius himself leading to the authorship of the *Constitutions*;¹⁷ and negotiations with the Holy See, particularly with reference to the approval of the Society as a religious order."¹⁸ The

¹⁴ O'MALLEY, *The First Jesuits*, pp. 335-336. Cf. also GANSS, *Cons.*, [822]; and DE ALDAMA, *Cons.*, pp. 309-310.

¹⁵ An excellent example of this can be seen in the *Constitutions*, "It will be helpful from time to time for superiors to see to it that those who are in probation feel their obedience and poverty, by testing them for their greater spiritual progress in the manner in which God tested Abraham [Gen: 22], and that they may give an example of their virtue and grow in it. But in this the superiors should as far as possible observe the measure and proportion of what each one can bear, as discretion will dictate" [285].

¹⁶ Documents of the early companions would include the vow formulas; those who pronounced the vows, i.e., the identity of the earliest companions who may be considered the best interpreters of Ignatius' thought; the early correspondence of the companions; and especially in the *Deliberations* of 1539, one can see something of the thought of the earliest companions. As O'MALLEY, points out: "the best guide, though outdated and limited in scope, is Jean-François GILMONT, *Les écrits spirituels des premiers jésuites: Inventaire commenté* (Rome: IHSJ, 1961, pp. 113-166). Cf. also, of course, C. SOMMERVOGEL, *Bibliothèque de la Compagnie de Jésus*," (Louvain, Bibliothèque S. J., 1960, 12 vols.; *The First Jesuits*, p. 383, note 19).

¹⁷ The most important of Ignatius' writing, apart from the *Spiritual Exercises*, is the *Constitutions circa missiones*, written between 1544 and 1545. This is one of Ignatius' first writings and is of key importance since it is the first draft of what eventually became Part VII of the *Constitutions*, the delineation of the vow of obedience to the pope.

¹⁸ Prior to the *Constitutions* see the bulls *Regimini militantis Ecclesiae*, *Exposcit debitum*, as well as other publications from the Holy See on related topics prior to and during this developmental stage of the Society. Cf. T. J. SHANAHAN, *The Jesuit Vow of Obedience to the Pope: Universal Service in the Vineyard of Christ*, (= SHANAHAN), PhD Diss., Fordham Univ., UMI, Ann Arbor, MI, 1975, pp. 28-29. To these must be added the rules and documents of earlier institutes researched by Polanco after he became involved with the undertaking. Cf. VALERO, *De Legibus*, in Appendix VI, for references to the more important papal documents.

Constitutions themselves went through five drafts, generally referred to as: *text a*, the first complete Spanish draft of the entire *Constitutions* (1547–1550), with the ten Part division of the text which survived to the final document;¹⁹ *text A*, 1550–1551, considered and after suggestions approved by the members of the Society called by Ignatius to Rome;²⁰ *text B*, 1556, called the autograph version in that it is the definitive text, continually revised by Ignatius till his death in 1556; *text C*, the text approved by the First General Congregation of the Society on 10 September 1558, and transcribed by Polanco and Rodrigues from the Autograph version;²¹ and *text D*, a new Spanish translation commissioned in 1594 by the Fifth General Congregation. Other versions exist, for example *text B'* (called *text B prime*), used by Jerome Nadal when he travelled Europe to promulgate the *Constitutions*, on the instruction of Ignatius;²² and *text B''*, made from the Autograph version, and appearing in the mid-sixteenth century.²³ The fourth Latin version, entitled *Constitutiones Societatis Iesu. Cum earum Declarationibus*, was completed in 1583, and has since been regarded as the official Latin text, with the *Declarations*, etc., inserted in the proper place.²⁴ “In 1936 appeared the masterful edition which is fundamental for all present-day

¹⁹ See *ConsMHSJ*, 2, pp. 129–257.

²⁰ See *ConsMHSJ*, 2, p. cxciv; also I, pp. lxxvii–lxxxv, 390–396.

²¹ *ConsMHSJ*, 2, pp. 123, 726. This Congregation also approved the first Latin translation prepared by Polanco, and decided in decrees 78 and 79 in *InstSJ*, II, p. 173, that it should be made the official text (*versio vulgata*); see also pp. 205, 224, 249, 283; but even so, the Spanish text was used as the norm for correcting and interpreting the vulgate Latin version. Much of this section is indebted to both GANSS and DE ALDAMA.

²² *ConsMHSJ*, 2, pp. xv–xvii, lxxxiii–lxxxiv. P. H. Kolvenbach recently reminded his curial staff that, “St. Ignatius took full account of the complexity and originality of his text. Nadal was sent to the Jesuits of Spain and Portugal, Ribadeneira went to northern Europe and, for the 200 companions working in Rome, Lainez was entrusted with reading with them this *rule* which describes a progressive incorporation into the apostolic body of the Society. The *Constitutions* would not be sent to India until there was someone able to accompany them. It is impossible to understand the text of the *Constitutions* without referring them to the concrete, personal life of the Society” (KOLVENBACH, *tempo forte*).

²³ See *MHSJ*, 64, pp. xiii–xlix. Cf. SHANAHAN, pp. 30–31; and GANSS, *Cons.*, pp. 50–51.

²⁴ This was published in *MHSJ*, 65, with a “[...] virtually exhaustive Introduction by Arturo Codina, [...]” (GANSS, *Cons.*, p. 53). It should be pointed out that DE ALDAMA, in his *The Constitutions of the Society of Jesus: Part VII, Missioning*, I. ECHANIZ, trans. (= DE ALDAMA, *Missioning*), Anand, India, Gujarat Sahitya Prakash, 1990, p. xi,

studies on the *Constitutions*, that of Arturo Codina, vol. 64 of the series *Monumenta Historica Societatis Iesu: Sancti Ignatii de Loyola Constitutiones Societatis Jesu. Tomus secundus: Textus Hispanus* (Rome, 1936).²⁵ While it is clear that especially the early drafts were heavily influenced by Ignatius himself, the work was shared, first by J. Codure until his death²⁶ and then by J. de Polanco, Ignatius' new secretary.

There is no doubt that Polanco's role in the crafting of the *Constitutions* was, to say the least, significant. So much so, that the question regarding the authorship of the *Constitutions* has been raised several times with various proposed solutions.²⁷ J. O'Malley, however, offers the most balanced observation on the matter:

Although the traditional interpretation that Ignatius himself was the principal inspiration behind the *Constitutions* and related documents still stands, much of the wording and arrangement and many of the details must be attributed to the secretary. In the long process of composition, Polanco made suggestions, raised questions, undertook research to help answer them, and drafted responses. Everything was submitted to Ignatius for approval and revision, but, as in any case of such close collaboration, the problem of authorship cannot be solved by facilely attributing the contents to Ignatius and the form to Polanco.²⁸

O'Malley later points out that, apart from Ignatius, "[...] given the important offices Polanco and Nadal held and the way they fulfilled them, none of their counterparts had a wider, more immediate, or more profound impact on their generation of Jesuits and on the future."²⁹

offers an alternate set of codes or abbreviations for the successive texts of the *Constitutions*. To avoid confusion this study will follow the method mentioned above in note 5.

²⁵ GANSS, *Cons.*, p. 53, goes on to point out that Ignacio IPARRAGUIRRE edited this text with helpful notes in *Biblioteca de Autores Cristianos*, vol. 86, *Ignacio de Loyola, santo, 1491-1556: Obras completas*, Edicion manual, trans., intro. y notas del P. I. IPARRAGUIRRE, con la autobiografia de San Ignacio edita y anotada por el P. C. de DALMASIS, Madrid, [Editorial Catolica], 1952.

²⁶ SHANAHAN, p. 24.

²⁷ See DE ALDAMA, *Cons.*, pp. 8-11.

²⁸ O'MALLEY, *The First Jesuits*, p. 7.

²⁹ O'MALLEY, *The First Jesuits*, p. 10. O'Malley goes so far as to say that, along with Ignatius, Polanco and Nadal are the major figures guiding his book. For biographical sources on Polanco see O'MALLEY, *The First Jesuits*, p.

Polanco said of Nadal: "He knows our father, Master Ignatius, well because he had many dealings with him, and he seems to have understood his spirit and comprehended our Institute as well as anyone I know in the Society."³⁰ One might edit this statement by adding "[...] with the exception of myself," for Polanco's experience of working day by day with Ignatius on the ordinary government of the Society undoubtedly allowed him insight into the general that no one else could have had. But Ignatius himself said, when he sent Nadal to present the *Constitutions* to the communities of Europe, "[...] he altogether knows my mind and enjoys the same authority as myself."³¹

After taking office, Polanco first acquainted himself with the origins and documents of the Society, then he studied the documents of other religious orders.³²

A final step was the composition of two preparatory treatises: *Measures Which the Society Should Use the Better to Attain its End (Industrias con que se ha de ayudar la Compañía para que mejor proceda para su fin)* and *Constitutions of the Colleges (Constituciones de los colegios)*. [...] Both these drafts later became proximate sources of the *Constitutions* of the Society. The *Constitutions of the Colleges* influenced the composition of Parts III and IV. The influence of

383, note 22, and for Nadal, note 27.

³⁰ J. O'MALLEY, "To Travel to Any Part of the World: Jerónimo Nadal and the Jesuit Vocation," (= O'MALLEY, *To Travel*), in *SSJ*, 16-2 (1984), p. 3. "Tiene mucho conocimiento de N. P. Mtro. Ignatio, porque le ha tratado mucho, y parece tiene entendido su espíritu, y penetrando, quanto otro que yo sepa en la Compañía, el instituto della" (in *EppIgn*, V, p. 109, 7 June 1553).

³¹ "[...] qui mentem nostram omnino noverit, et nostra autoritate fungitur, [...]" (*MonNad* 1, p. 144, 10 April 1553).

³² DE ALDAMA makes the important point that, "[...] Ignatius has all too often been depicted as an absolute innovator who turned his back on the whole past of religious life in the Church. It is true that he ruled out monastic-style community and stability as incompatible with his ideal of the itinerant apostolic mission, yet he desired to place himself in the ancient tradition which distinguished the religious state in the Church. Also, to the extent that the charism proper to the Society allowed, he wanted to take advantage of the rich spiritual heritage found in the legislation of other religious orders" (*Cons.*, p. 5). The extracts collected by Polanco are preserved in the archives of the Pontifical Gregorian University. For an example of their application in the *Constitutions*, cf. A. HSÜ, *Dominican Presence in the Constitutions of the Society of Jesus: A Study of Dominican Influence on the Textual Make-up of the Jesuit Constitutions in Regard to the Formation of Novices and the Rules for the Novice Master, Based on an Unpublished Manuscript of Juan A. Polanco (1517-1576)*, Excerpta ex dissertatione ad Lauream in Facultate Theologiae, Pontificiae Univ. Gregorianae, Roma, 1971, 109 p.

the *Measures (Industrias)* is to be found throughout the *Constitutions*, though to a lesser extent in Parts II, III, and IV.³³

One can observe the pragmatic and practical approach employed at each step of the work's development.

2. Juridical Value of the *Constitutions*

Before considering those passages from the *Constitutions* which relate to the mission vow, it is important to reaffirm their value and authority. The principles of interpretation of a juridical text, mentioned earlier, should be recalled. Especially relevant is canon 17:

Ecclesiastical laws are to be understood in accord with the proper meaning of the words considered in their text and context. If the meaning remains doubtful and obscure, recourse is to be taken to parallel passages, if such exist, to the purpose and the circumstances of the law, and to the mind of the legislator.³⁴

To this may be added canon 16:

§1. Laws are authentically interpreted by the legislator and by the one to whom the legislator has granted the power to interpret them authentically.

§2. An authentic interpretation communicated in the form of a law has the same force as the law itself and must be promulgated. Furthermore, if such an interpretation merely declares what was certain in the words of the law in themselves, it has retroactive force; if it restricts or extends the law or if it explains a doubtful law, it is not retroactive.³⁵

³³ DE ALDAMA, *Cons.*, pp. 5-6. The *Industrias* can be found in *MHSJ*, PolCompl, pp. 725-775; and the *Constitutiones* in *MI Regulae*, pp. 217-245. Ignatius and Polanco continued with the *Constitutions* the manner of writing and revision, mentioned above, that was used to revise the *Formula*. A first draft with reflections and questions were presented to Ignatius, who would make marginal notations, etc., which were then recopied under the direction of Polanco (see DE ALDAMA, *Cons.*, p. 4 ff.).

³⁴ "Leges ecclesiasticae intellegendae sunt secundum propriam verborum significationem in textu et contextu consideratam; quae si dubia et obscura manserit, ad locos parallelos, si qui sint, ad legis finem ac circumstantias et ad mentem legislatoris est recurrendum" (*CIC* 83, c. 17).

³⁵ "Leges authentice interpretatur legislator et is cui potestas authentice interpretandi fuerit ab eodem commissa. §2. Interpretatio authentica per modum legis exhibita eandem vim habet ac lex ipsa et promulgari debet; si verba legis in se certa declaret tantum, valet retrorsum; si legem coarctet vel extendat aut dubiam explicet, non retrahitur" (*CIC* 83, c. 16 §1).

In Chapter II it was pointed out that over one hundred changes were made to the 1540 *Formula* which were included and promulgated in the 1550 version, changes made “because of the lessons learned through experience and usage, but in the same spirit.”³⁶ Already by 1550 the companions had articulated the end for which the Society had been founded and the substantial means for achieving that end. It was also observed that the *Formula* granted to the superior general, with the brethren, the authority to write the *Constitutions* and to “[...] explain officially doubts which may arise in connection with our Institute as comprised in this *Formula*.”³⁷ The *Constitutions*, promulgated by the First General Congregation, stand with the force of law as the “official” and authentic interpretation of the *Formula*, and also provide the best insight into the mind of the legislator.

What precisely is meant by the word *mission* as it appears in the text and the context of the vow formula of the Society of Jesus; and what do the apostolic letters and the *Constitutions* add to the understanding of the the meaning of the vow? An examination of the *Constitutions* will assist in clarifying any doubts that remain regarding a proper interpretation of the Jesuit mission VOW.

PART II: The *Constitutions* Part VII

Part VII of the *Constitutions*, “The distribution of the incorporated members in Christ’s vineyard and their relations there with their fellowmen,”³⁸ is the one portion of the *Constitutions* for which Ignatius was almost solely responsible. It was the earliest written and most important Part, adapted almost in whole from the “Constitutions and Declarations Regarding Missions”

³⁶ DE ALDAMA, *Formula*, p. 33.

³⁷ *ConsMHSJ*, 1, p. 376.

³⁸ The translation is from GANSS, *Cons.*, p. 267, of the title of Part VII from *text B*: “De lo que toca a los admitidos en el cuerpo de la compañía para con los proximos, repartiéndose en la viña de Christo N.S.” (in *ConsMHSJ*, 2, p. 560).

composed by Ignatius in 1544–1545.³⁹ “These fifty-one constitutions and explanatory *declarations* [603–654...] lay out with precision and clarity answers to the crucial definitive questions—the who, what, when, where, and why—about the Jesuit mission.”⁴⁰

In general, the four Chapters may be seen as two sections.⁴¹ The first three Chapters deal with the sending or missioning of Jesuits, while Chapter Four addresses apostolic activity based out of a stable residence of the Society.

With regard to missions, the following distinctions are made: one may be sent to a definite spot by the pope (Chapter 1) or by the superior of the Society (Chapter 2) or to a larger region without specification of place or activity (Chapter 3).⁴²

A. “Chapter 1 Missions from the Holy Father” [603–617]

In the first Chapter, after he identifies that the fourth vow will be treated first “[...] as being most important [...],” [603], Ignatius treats the meaning of the vow. Already, in Part V of the *Constitutions*, the wording of the vow formula is found:

³⁹ DE ALDAMA, *Missioning*, p. 1. There is a reference to the *Constitutiones circa missiones* in Ignatius' *Spiritual Journal* dated 16 and 17 March 1544 (in *ConsMHSJ*, 1, p. 128). The *Constitutiones* themselves can be found in *ConsMHSJ*, 1, pp. 159–164. “When Polanco was preparing text P of the general *Constitutions* (1549–1550), he took this fascicle of the *Constitutiones circa missiones*, and without making a fresh copy [...] he inserted it as it was among the folios of the text he was composing” (DE ALDAMA, *Missioning*, pp. 1–2). “It is from them [the *Constitutiones*] that the end of no. 1 ([603]), nos. 2,3,5,6 and 8 ([606, 609, 612, 615, 617]), and *declaration* B ([605]) have originated. When Polanco incorporated these ‘*Constitutiones*’ into text P, he made some corrections and added a few paragraphs, which later resulted in nos. 4 and 7 ([611, 616]) and *declaration* C ([607]). Then came the transfer from text P to text A; and like the rest of the *Constitutions*, this Chapter, too, was edited and trimmed, [...]. Text B, however, except for the preamble, is a faithful copy of text A; it has nothing new except one or other sentence, added at a second stage, and *declarations* A, E and G ([604, 610, 614])” (ibid., p. 7).

⁴⁰ T. M. LUCAS, *The Vineyard at the Crossroads: The Urban Vision of Ignatius Loyola*, (= LUCAS), PhD Diss., Graduate Theological Union, Berkeley, CA, 1992, UMI Diss. Services, Ann Arbor, MI, 1994, p. 163.

⁴¹ See DE ALDAMA, *Cons.*, pp. 245 ff.

⁴² DE ALDAMA, *Cons.*, p. 245.

I further promise a special obedience to the Sovereign Pontiff in regard to the missions, according to the same apostolic letters and the *Constitutions*.⁴³

Earlier it was pointed out that the *Formula of the Institute* clarified the object of the vow, indeed the purpose of the Society: “[...] we are to be obliged to carry out whatever the present and future Roman Pontiffs may order which pertains to the progress of souls and the propagation of the faith and to go to whatsoever provinces they may choose to send us, [...]”⁴⁴

De Aldama addresses those who would like to say that there are two elements or objects of the vow: “[...] whatever they may order [...],” and “[...] to whatsoever provinces they may choose to send us [...]” He points out that:

[...] the second element was not contained in the first composition of the *Formula* or ‘*Five Chapters*’; it was introduced into the *Formula* of 1540, and thus deliberately. This addition cannot be explained if it was not made with the intention of explaining and defining the first element, precisely because its formulation was too extensive. This interpretation is not something we have discovered; we find it expressly stated by Nadal in his commentaries on the *Formula*; he says that, in the phrase ‘[...] and to whatever provinces [...]’ (*et ad quascumque provincias*), ‘the *et* is explanatory; for this vow is understood only in regard to missions.’⁴⁵

De Aldama continues his argument by pointing out that, from the beginning, the *Formula* specified examples of the object of the vow which began with “[...] whether they send us among the Turks [...]”⁴⁶ and not with “whether they order.”⁴⁷

⁴³ “*Insuper promitto specialem obedientiam Summo Pontifici circa missiones; prout in eisdem litteris apostolicis et Constitutionibus continetur*” (in *ConsMHSJ*, 3, p. 168, trans. by GANSS, *Cons.*, [527]).

⁴⁴ “[...] ut quidquid modernus et alii Romani Pontifices pro tempore existentes iusserint ad profectum animarum et fidei propagationem pertinens, et ad quascumque provincias nos mittere voluerint [...] exsequi teneamur” (trans. from DE ALDAMA, *Cons.*, p. 247). Much of this section is indebted to DE ALDAMA.

⁴⁵ DE ALDAMA, *Cons.*, p. 248; ID., *Formula*, p. 60. For the reference to Nadal cf. *ConsMHSJ*, 1, p. 10, no.1; also, M. R. JURADO, “Nadal y Polanco sobre la *Fórmula del Instituto* de la Compañía de Jesús,” in *AHSJ*, 47 (1978), p. 237. DE ALDAMA, in *Missioning*, p. 65, refers to “[...] pairs of words typical of Ignatius’ style, in which the second word emphasizes the first and adds a new nuance.” Cf. also S. SOLA, “En torno al castellano de San Ignacio,” in *Razón y Fé*, 153 (1956), pp. 268–270.

⁴⁶ “[...] sive miserint nos ad Turcas, [...]” (DE ALDAMA, *Cons.*, p. 248).

⁴⁷ “[...] sive iusserint [...]” (DE ALDAMA, *Cons.*, p. 248).

In the *Constitutions*, at the very beginning of this first Chapter which deals with the missions from the Holy Father, Ignatius, himself, clarifies the meaning of the fourth vow:

[...] the vow which the Society made to obey him [the pope] as the Supreme Vicar of Christ without any excuse, meant that the members were to go to any place whatsoever where he judges it expedient to send them for the greater glory of God and the good of souls, whether among the faithful or the infidels [B]. The Society did not mean any particular place, but rather that it was to be distributed into diverse regions and places throughout the world and it desired to proceed more correctly in this matter by leaving the distribution of its members to the Sovereign Pontiff [603].

The phrase, “[...] to proceed more correctly in this matter [...]” readily recalls the reasons for the vow which were incorporated into the 1550 *Formula*: “Yet for the sake of greater devotion in obedience to the Apostolic See, of greater abnegation of our own wills, and of surer direction of the Holy Spirit, [...]”

The “[B]” in the above quotation refers to *declaration B*, an authentic interpretation added by Ignatius which leaves no room for doubt regarding the intention of the vow:

The intention of the fourth vow pertaining to the pope was not to designate a particular place but to have the members distributed throughout the various parts of the world. For those who first united to form the Society were from different provinces and realms and did not know into which regions they were to go, whether among the faithful or to the unbelievers; and therefore, to avoid erring in the path of the Lord, they made that promise or vow in order that His Holiness might distribute them for the greater glory of God. They did this in conformity with their intention to travel throughout the world and, when they could not find the desired spiritual fruit in one region, to pass on to another and another, ever intent on seeking the greater glory of God our Lord and the greater aid of souls [605].⁴⁸

Earlier in the *Constitutions*, where the procedures for admission to profession are discussed, a parallel passage is found:

The entire meaning of this fourth vow of obedience to the pope was and is in regard to the missions. In this manner too should be understood the bulls

⁴⁸ It should be pointed out that in 1541 an editorial principle was adopted whereby elements that pertained more to the superior should be placed in the *Declarations*, and those which primarily concerned the subject would be placed in the *Constitutions*. Both have equal juridical value (DE ALDAMA, *Missioning*, p. 61; *ConsMHSJ*, 1, p. 43).

in which this obedience is treated: in everything which the Sovereign Pontiff commands and wheresoever he sends one, and the like [529].

Yet another parallel passage may be recognized in the first Chapter of Part I of the *Constitutions* where it is said: “This is a vow *to go* anywhere His Holiness will order, whether among the faithful or the infidels [...],” [7].⁴⁹ Likewise, the first Chapter of the *Constitutions Regarding Missions* is entitled, “On the Promise and Vow *to Travel* Through Any Part of the World.”⁵⁰

This same principle is presumed in all that follows in Part VII, which specifies in some detail the manner of undertaking missions or apostolic journeys:

In the whole of the following context, mention is made only of missions: that there is to be neither ambition for nor refusal of ‘these missions’ (*missionum ac provinciarum huiusmodi*) nor efforts to make arrangements with the pope about ‘these missions’ (*de huiusmodi missionibus*), nor is the general to try to arrange to be sent or not to be sent (*de sui ipsius missione in alterutram partem*).⁵¹

A close examination of the context shows that the use of the word “mission” carries the understanding of the action of sending: One should be indifferent, and no one should directly or indirectly, for himself or for another, aspire “[...] to reside in or to be sent rather to one place than another” [606]; The one sent should be generous, “without requesting provisions for the journey or causing a request for anything temporal to be made, [...]” [609]; It may be that the pope may not specify the person to be sent, “[...] but orders that one or more should go to one region or another [...]” [611]; “It is highly expedient that the mission should be entirely explained to the one who is thus sent [...]” [612]; “When they are sent to particular places without determination of the time by His Holiness, it is understood that the residence should last three months [...]” [615]; If residence in a place is prolonged, “[...] it will not be improper for

⁴⁹ Emphasis is mine.

⁵⁰ “De la promesa y voto que la Compañía hizo nuestro Señor y a su universal vicario para discurrir por unas partes y por otras del mundo” (in *ConsMHSJ*, 1, p. 159). Cf. DE ALDAMA, *Cons.*, p. 249. Emphasis is mine.

⁵¹ DE ALDAMA, *Cons.*, p. 248.

the one on the mission to make some excursions to aid the souls in the neighbouring regions [...],” [616]; etc.⁵²

Another point of interest arises in this first Chapter of Part VII. The notion of *representation* is seen in the following paragraph:

When one of the subjects has been designated for some place or undertaking and it is judged that the Supreme Vicar of Christ, if well informed, would not send him to it, the superior general may give him better information, while finally leaving the entire matter to the decision of His Holiness [607].

This principle is fundamental to the good governance of the Society, and far from being an attempt to manipulate a superior,

[...] the object of the representation is to help the superior, informing him of what is necessary for him to know, so that he can lead his subjects with greater hope of success both in the practice of perfection and in the discharge of their apostolic ministries. The thought that inspires it is, then, one of love and reverence for the superior and for the interests of God in general, which on occasion, might suffer injury if obedience is followed too literally and without making known the possible disadvantages which the superior evidently has not stopped to consider.⁵³

Spiritual freedom and *indifference* are, of course, presumed in the relationship between the superior and the subject.

B. “Chapter 2 The missions received from the superior of the Society” [618–632]

The nucleus of this chapter was fashioned by the *Declarations Concerning Missions*,⁵⁴ and focuses upon “[...] the faculty of sending which was granted to the superior of the Society

⁵² See DE ALDAMA, *Cons.*, pp. 249–250.

⁵³ M. ESPINOSA-PÓLIT, *Perfect Obedience: Commentary on the Letter on Obedience of Saint Ignatius of Loyola*, (= *Perfect Obedience*), W. J. YOUNG, trans., Westminster, MD, Newman Press, 1947, p. 190. For other examples of representation in the *Constitutions*, cf. [92, 131, 292, 293, 543, 610, 618, 627, and 810]. Representation and indifference will be considered more thoroughly in the section of this Chapter which deals with the third vow, where they will be linked to “manifestation of conscience.”

⁵⁴ *ConsMHSJ*, 1, pp. 162–164, written by IGNATIUS in 1544–45.

and the way this faculty should be used.”⁵⁵ Both issues are pivotal to this discussion. The first has ramifications on the interpretation of the extension of the fourth vow, and the second outlines the founders’ understanding of the criteria for apostolic selection, an invaluable insight into how they understood the apostolic enterprise of the institute.

At the beginning of the *Declarations* Ignatius recalls that when the companions first “got together into one,” they “vowed and promised to God” to undertake the missions from the pope. “And this is where he calls this vow and promise ‘our principle and main foundation.’”⁵⁶ While this description of the vow does not appear in the *Constitutions*, it remains a most succinct and apt characterization of the central importance of the vow to the intention, understanding and development of the Society.

1. The Mission Faculty

Ignatius then continues:

Some years later, enjoying greater facilities in many places and anxious to be of greater help to souls whose spiritual good we greatly desired, as also for our own greater security and clarity, because it seemed to us very expedient, we sought and obtained from His Holiness the necessary faculty for the superior of the Society to send anyone from the Society on mission among the faithful Christians wherever it seemed expedient and for the greater service of God our Lord; however, they would remain there or wherever else they happened to be, always at the disposal, order and command of His Holiness, in accordance with our promise.⁵⁷

⁵⁵ DE ALDAMA, *Missioning*, p. 61. The first draft of this section, Text P, Polanco’s draft, contained only constitutions; but after following the principle that matter concerning superiors should be placed in *declarations*, the Chapter retains only two constitutions [618 and 629] with the rest of the material in the form of *declarations*.

⁵⁶ DE ALDAMA, *Missioning*, p. 63. Cf. *ConsMHSJ*, 1, p. 162; II, p. 214: “[...] nuestro principio y principal fundamento [...].” An alternative translation is that of O’MALLEY: “[...] our beginning and the principal foundation of the Society” (O’MALLEY, *The First Jesuits*, p. 298).

⁵⁷ *ConsMHSJ*, 1, p. 162: “[...] después, passando algunos años, mirando y deseando maior fructo spiritual de las ánimas a maior gloria de Dios nuestro Señor, por más socorrerlas y con maior facilidad en muchas partes, y por maior seguridad y claridad de las nuestras, pareciéndonos mucho conveniente alcançamos y impetramos gracia de su santidad que el superior de la Compañía pudiese inbiar entre fieles christianos, donde le pareciese ser más expediente y maior seruicio de Dios nuestro Señor a qualesquiera de la Compañía, tamen estando allí o dondequiera que se hallasen siempre

The faculty mentioned above for the superior general to mission Jesuits among Christians, obtained around 1543, was “[...] a ‘*vivae vocis oracula*’ granted precisely through Cardinal Guidiccioni, who had been so opposed to the approval of the Society.”⁵⁸

The circumstance which prompted Ignatius to request the faculty was a question which arose regarding the nature of the duration of a mission. The pope could send one on a mission for a specific period of time, or to accomplish a specific task. The mission would be complete either at the end of the designated time or upon completion of the task. But what of those cases where neither was specified? Ignatius addressed the issue in the *Constitutions Regarding Missions*, and settled on three months, more or less, depending on the circumstances.⁵⁹ But this did not close the matter, for Polanco raised further questions:

[...] if the pope sends someone and does not fix a time limit, can the general call the man back at any time, or at least when the time fixed has passed and the mission can be deemed to have ‘expired’? Two Roman law experts were consulted and their replies were contradictory: one said that the pope alone could call back somebody he had sent, ‘*quia omnis res per quascumque causas nascitur, per easdem dissolvitur.*’ The other expert opined that the pope left the matter to the superior.⁶⁰

a la disposición, ordenación y mandamiento de su santidad conforme a la nuestra promesa.” Trans. from DE ALDAMA, *Missioning*, p. 63.

⁵⁸ DE ALDAMA, *Missioning*, pp. 63–64. On p. 64, note 17 he says: “The document’s date is not certain. The original itself bears two: one hand wrote ‘circiter annum 1542’ and another ‘1543 (or 1545?) circiter.’ CODINA tries to prove that it dates from 1542 basing his argument on the faculty, granted therein, to use Cardinal Quiñones’ breviary, referred to by Ignatius in a letter to Simon Rodrigues written towards the end of 1542 (cf. *ConsMHSJ*, 1, p. CXXIII). But this latter phrase is far from clear: ‘The one with the faculties to recite the new office goes together with this letter.’ (*EppIgn*, I, p. 212). And Rodrigues tells us in a letter that, well before 1 September 1541 Ignatius had sent him, first, ‘permission for six to recite the new office,’ and then ‘for three in writing’ (*MHSJ*, Rodrigues, pp. 527–528. Cf. also *EppXav*, I, p. 144). On the other hand Ignatius’ words to Bernal Diaz de Luco in his letter of January 16, 1543 would seem to indicate that he did not yet have power to send, even among the faithful (cf. *EppIgn*, I, pp. 241–242).” The terms of the grant are found in *SdeSI*, I, p. 550: “[...] potestatem expressam alios inferiores mittendi inter christifideles, ubicumque ad religionis fructum amplioem seu maiorem Societatis commoditatem expedire iudicaverit. Ita tamen ut qui missi fuerint, semper sint parati eo tendere, quo Sanctitati Suae transmittere ipsos placuerit, iuxta votum eidem Sanctitati Suae ab initio praestitum” (ibid).

⁵⁹ *ConsMHSJ*, 1, p. 161, incorporated into the *Constitutions* in [615].

⁶⁰ DE ALDAMA, *Missioning*, p. 53. The discussion is found in *ConsMHSJ*, 1, pp. 301, 322–323.

In light of this split-decision, the faculty was sought by Ignatius to send and recall men on missions.

Later, in 1549, the bull *Licet debitum* granted full authority whereby:

[...] the general himself can go and can send his men to go [on missions], and recall them, anywhere in the world, even among the infidels, when he deems it expedient in the Lord.⁶¹

This grant found its way into the following paragraph of the *Constitutions*:

To be able to meet the spiritual needs of souls in many regions with greater facility and with greater security for those who go among them for this purpose, the superiors of the Society *according to the faculty granted by the Sovereign Pontiff*, will have authority to send any of the Society's members whomsoever to whatsoever place these superiors think it more expedient to send them, although these members, wherever they are, will always be at the disposition of His Holiness [618].⁶²

Parallel passages are found at [749 ff.], where the powers of the superior general are outlined:

"The same general has complete authority over the missions, but in no case may he obstruct missions of the Apostolic See [...] he may send all, professed or not professed, to any regions of the world."⁶³

The constitution just quoted, [618], lists two reasons which motivated the granting of the faculty to the superior general: "To be able to meet the spiritual needs of souls *in many regions with greater facility, and with greater security for those who go among them for this purpose.*"

⁶¹ *ConsMHSJ*, 1, p. 358, Latin in VALERO, *De legibus*, II, no. 54, in Appendix VI.

⁶² Italics mine.

⁶³ DE ALDAMA, *Missioning*, p. 54, reports a further nuance: "Then in 1662, Gregory XV established the S. Congregation of Propaganda Fide to look after the affairs concerning the propagation of the faith throughout the world, with power over 'all the missions' and the faculty to appoint and change personnel. Consequently in 1646 General Vincent Carafa thought it fit to enquire from the Congregation of Propaganda itself whether the superior general of the Society and the other superiors with delegation from him were empowered to transfer missionaries and send others in their place. The Congregation replied on October 15 of the same year that 'in view of the diligence and promptitude the Society had always shown in choosing the Fathers who should go to the missions with neither provisions nor stipend, it considered that the petition should be granted, provided that the Congregation was informed of the names of the missionaries to be transferred and of those who would replace them.' Pope Innocent X confirmed this decision the same day." Cf. *Bullarium Romanum*, ed. TAUR, vol. XII, pp. 690-693.

Ignatius' earlier notation also added, "[...] for our own greater security and clarity, because it seemed to us very expedient [...]," which recalls the doubt raised by Polanco, and the mixed opinion of the canonists which were consulted. The granting of the faculty closed those doubts. But in *declaration A*, which follows it, Polanco is even more clear:

The superior of the Society can more easily and more expeditiously make provision for many places (especially those remote from the Apostolic See), than would be the case if those who need members of the Society must always approach the Sovereign Pontiff. For the individual members, too, there is greater security if they go from obedience to their superiors rather than through their own decision (even if they were capable of making it), and not as men sent by him whom they have in place of Christ to direct them as the interpreter of His divine will [619].

In *declaration C*, Polanco adds further nuances where he says:

The sending of subjects 'to whatsoever place these superiors think it expedient' means either among the faithful, even though it be in the Indies, or among the unbelievers, especially where there is a colony of believers, as in Greece and elsewhere. Where the inhabitants are more exclusively unbelievers, the superior should ponder seriously in the sight of God our Lord whether he ought to send subjects or not, and where, and whom [...], [621].

In a later *declaration* further considerations are raised:

When no limitation has been set by the Sovereign Pontiff as regards the time for which some laborers are sent to one place and others to another, it seems that the length of their stay ought to be regulated by the following considerations. Thought should be given to the nature of the spiritual affairs being dealt with, to the greater or less importance the men themselves have as viewed against the need and the fruit which is being reaped or expected. Then, too, attention must be given to the opportunities available in other places, to the resources which the Society possesses to provide for these other undertakings. One should also weigh the accidents which can intervene to shorten or prolong the time. Finally one should attend to the first characteristic of our institute. Since this is to travel through some regions and others, remaining for a shorter or longer time in proportion to the fruit which is seen, it will be necessary to judge whether it is expedient to give more time or less to certain missions or to others [...], [626].

We note that the above *declaration*, [626], defines the "first characteristic" of the Society: "[...] to travel through some regions and others, remaining for a shorter or longer time in proportion

to the fruit which is seen [...].” But even more important is the contribution which this discussion makes to the development and understanding of the notion of *faculty*.

Because Ignatius obviously felt it necessary to request the faculty from the pope, some have concluded that in his mind *only* the pope had the authority to send professed Jesuits on missions and recall them. This is to say that, at least initially, Ignatius gave a strict interpretation to the limits of the vow, that he understood that this promise of “[...] special obedience to the Sovereign Pontiff in regard to the missions [...]” reserved exclusively to the pope the distribution of professed Jesuits. It seems more reasonable to suggest that during the founding years of a new and unique religious order in the Church, Ignatius was “finding his way” as a superior general, and, as in other matters, clarity was being developed through usage and experience regarding its structures, his proper role as supreme moderator, and the relationship of the pope to the institute. For Ignatius, Polanco and the companions the issue of the general’s authority was resolved when the pope granted to the superior general the faculty to send and recall men on missions. This was definitively granted and became “proper law” of the Society as early as 1549 in the bull *Licet debitum*; ⁶⁴ and then it was clearly stated in the *Constitutions* quoted above.⁶⁵

2. Criteria for apostolic selection

The second issue addressed in this Chapter of Part VII concerns the way in which the superior of the Society should use the faculty to distribute men on apostolic missions. Ignatius, who consistently referred to himself as the “pilgrim,”⁶⁶ remained fixed on his goal, which was also the goal of the Society: “the greater glory of God and the good of souls.” He desired that every Jesuit have as his first commitment to seek and find God in everything.

⁶⁴ GANSS, *Cons.*, p. 66, *Exposcit debitum*, the 1550 *Formula* [2].

⁶⁵ The implications of this faculty will be considered in the next Chapter.

⁶⁶ See especially the *Autobiography*.

This attitude of constant seeking is reflected in the *Constitutions*. First of all, the text itself is an unfinished work; Ignatius kept improving it to the end of his life, and he had no intention of saying the last word. Moreover, what he does say is often not so much a binding directive as an invitation to engage in serious discernment in the light of concrete circumstances, to determine what should be done. This obviously requires that those concerned have the right spirit.⁶⁷

While the “right spirit” of “serious discernment” pervades the life of the Society and permeates the *Constitutions*, its practical implementation can be observed in the application of the principle of the *magis*, or the *greater* glory of God and the universal good, to the criteria for the selection of apostolic ministry. As T. Lucas points out:

The most notable linguistic feature of Part VII [of the *Constitutions*] is the constant *ostinato* of comparative adjectives and adverbs. The underlying criterion of the *greater* service of God and the *more* universal good grounds all choices in what the modern social sciences call ‘the multiplier effect.’ All decisions—whom to send, where they are to work, what they are to do, what norms they are to follow—are subordinated to the unrelenting demand of the *magis*, the greater service, the more universal good. That criterion makes hard demands, and imposes the responsibility to measure hierarchically arranged values against one another. [...] The norms he [Ignatius] proposed function *ceteris paribus*, ‘when other considerations are equal.’ Given that other considerations are often unequal, that liberating qualifier leaves room for divergence from past decisions in any given situation.⁶⁸

Thus, Ignatius, when speaking of the norms for the selection of ministry, does not focus so much on *what* ministry to choose, as he does on the *attitude* one must bring to the *procedure* of choosing ministry.

In the *Declarations Regarding Missions*, Ignatius writes that the superior should use the faculty, recently granted, “[...] sparingly and not every time [...]” while “[...] looking always

⁶⁷ *Cons. Supp.*, 2, p. 3.

⁶⁸ LUCAS, pp. 166–167.

to the greater and more universal benefit of souls.”⁶⁹ The equivalent constitution tells the superior that he:

[...] ought to bestow much careful thought on missions of this kind in order that, when he sends subjects [...] that procedure may always be used which is conducive to the greater service of God and the universal good [618].

A later *declaration* says:

To proceed more successfully in this sending of subjects to one place or another, one should keep the greater service of God and the more universal good before his eyes as the norm to hold oneself on the right course [...], [622, a].

Once this principle of the “greater service of God and the universal good” is established, Ignatius applies it to the circumstances of the mission.⁷⁰ He says that “When other considerations are equal [...],” Jesuits ought to consider a place or an area: “[...] which has greater need [...],” [622, a]; “[...] where greater fruit will probably be reaped [...],” [622, b]; “[...] where our indebtedness is greater [...],” [622, c]; “[...] preference ought to be given to those persons and places which, through their own improvement, become a cause which can spread the good accomplished to many others [...],” [622, d]; “For that reason, the spiritual aid which is given to important and public persons ought to be regarded as more important, since it is a more universal good. [...] The same also holds true of the spiritual aid which is given to persons distinguished for learning and authority, because of that reason of its being the more universal good. For that same reason, too, preference ought to be shown [...] to the great nations

⁶⁹ *ConsMHSJ*, 1, p. 163: “[...] con mucho miramiento deue usar de la tal facultad y gracia concediendo parçe o no todas vezes, mirando siempre el maior y el más universal prouecho de las ánimas [...]” (trans. in DE ALDAMA, *Missioning*, p. 71).

⁷⁰ LUCAS, pp. 163–164, includes an excellent note 358 which reads: “In the 51 paragraphs [of Part VII] the idea of the universal (or more universal) good appears at least 9 times [613, 615, 618, 622a, 622d, 623e, 626, 650], ‘more universal benefits’ 4 times [618, 623a, 623f, 624]. The ‘greater glory’ and/or ‘greater service of God’ is the most characteristic phrase of the document: it appears in 18 places [twice in 603, twice in 605, 608, 609, thrice in 618, 622a, 623a, 623g, twice in 624k, 634, 645, 647 and 650]. The comparative adjective ‘greater’ (*mejor*) appears another 25 times in the Chapter in the following contexts: aid to souls [605], devotion [610, 622b], spiritual fruit [615 and 622b], facility [618], security and safety [618, 619], need [622a, 631], indebtedness [622c], perfection [twice in 623b] confidence [624a], hodyly labors [624b], spiritual dangers [624c], edification [625c, 645], importance of those to whom the Society is sent [626, 638], and care proportionate to the nature of the work [629].”

such as the Indies, or to important cities, or to universities, which are usually attended by numerous persons [...],” [622, e]; “[...] where the enemy of Christ our Lord has sown cockle [...], [622, f]. Ignatius continues that if “[...] other considerations are equal, the spiritual goods ought to be preferred to the bodily, the matters of greater perfection to those of less, and the things more good to those less good,” [623, b]. Principles of apostolic selection include phrases such as: spiritual good, greater perfection, more urgent, more specific to the Society, unattended by others, safer, easier, more easily dispatched, of more lasting value, etc. [623]. Other considerations include: the qualities and number of those to be sent; how to send them, i.e., like the poor, on foot, with better resources; for how long to send them; how to recall them; the information to be given to the one sent; the prayer and consultation to be undertaken by the superior; and the availability of the one sent. The Chapter concludes with the enjoinder that “This should also be applied to everything else” [632].

There is one overriding norm that colours the entire process of the selection of ministry. Ignatius says: “The more universal the good is, the more it is divine” [622 d]. This understanding of the universal good, so often linked with and even expressed in the phrase which has been called the Jesuit motto, “for the greater glory of God,” while inspiring and rich in tradition for a Jesuit, can seem obsessive and repetitious to a non-Jesuit. But it is absolutely central to a proper understanding of the intention of the mission vow.

C. “Chapter 3 A member’s free movement from one place to another” [633–635]

Chapter three, very brief, containing only three constitutions, addresses the third way of undertaking apostolic ministry:

[...] or they themselves may choose where and in what work they will labour, when they have been commissioned to travel to any place where they judge that greater service of God and the good of souls will follow [603].

The Chapter presumes the situation of “[...] one who is sent to an extensive region such as the Indies or other provinces and for whom no particular district is marked out [...],” such as when Francis Xavier was sent to evangelize India. Such a circumstance allows the one sent to “[...] remain in one place for a longer or shorter period [...],” or “[...] he may travel about wherever he judges this to be more expedient for the glory of God our Lord.” [633]. Perhaps more so than any other type of mission this one recalls the intention of the companions regarding the fourth vow, which:

[...] was not to designate a particular place but to have the members [...] travel throughout the world and, when they could not find the desired spiritual fruit in one region, to pass on to another and another, ever intent on seeking the greater glory of God our Lord and the greater aid of souls [605].

The *Constitutions*, of course, indicate again that a mission from the pope takes priority over other missions.

An interesting element of overlapping jurisdiction can be recognized where the constitution says:

[...] without swerving from that foremost and supreme order of His Holiness, in missions of this type the superior will have much greater power to direct a member to one place rather than another [...], [633].

This constitution is placed, not in the first Chapter, which considers missions from the pope, nor in the second Chapter, which considers missions from the superior, but in the third Chapter, which presumes a certain freedom on the part of the one sent. Presumably one can be sent on such a mission either by the pope or by the superior. In either circumstance the superior has “[...] greater power to direct a member [...].”

The mission faculty granted to the superior general was requested to resolve the canonical split-decision regarding whether the general had the authority to recall men who had been sent on papal missions. The faculty gave him the authority. But in this context Polanco raised another question: “When somebody is sent by the pope, does he remain under Jesuit government during

the time of his mission?"⁷¹ Ignatius answered, "He remains so no less than before as long as it is not against the obedience of the pope."⁷² Thus, the one sent on a papal mission has the obligation to the pope to carry out the mission according to the terms, if any, defined by the pope. But there are also circumstances in which the general may recall a man, even one who is on a papal mission, and the subject has the obligation to obey the general, who, likewise, himself, is constrained by any limits set by the pope.⁷³

Polanco's question notwithstanding, it is clear that a Jesuit, even while undertaking a papal mission, remains a religious and has obligations as regards the practice of his religious life—obligations understood according to the "quasi pactum" entered into at the time of his profession, which is understood according to the *Constitutions*. The phrase "[...] as long as it is not against the obedience of the pope [...]," seems to presume a possible circumstance where the pope could place limits on a mission which could conceivably dispense the one sent from the obligations of his religious profession. The question may be asked: Are there *any* limits on the missions which the pope may legitimately give to a professed member of the Society? J. Futrell, points out that Ignatius, indeed, placed some "limits" on the discernment of the pope:

Ignatius had no doubt that when he gave a direct command the pope expressed the will of God for a Christian, since he is the Vicar of Christ on earth who must be obeyed in the place of Christ when he invokes his plenary authority. But the authority of the pope over the Company was conditioned by the scope of our vocation: 'we made this special promise and vow in order that His Holiness might send us on different missions for the greater glory of God our Lord *conformably to our promise and intention to go out to the whole world.*' When Ignatius felt that the orders of the pope threatened to frustrate the essentially apostolic vocation of the Company, while he obeyed the command,

⁷¹ DE ALDAMA, *Missioning*, p. 53.

⁷² *MICons.* I, p. 301, no 8: "q. 8^o. Quando vno es q ynbiado por el papa, dúdase si en tiempo de tal misión esté debaxo del gouierno del preposición en todo lo que no es contra lo que manda el papa." "Pareze que sí, y más que antes"; p. 323 no 21: "21^o Quando vno es inbiado por el papa, dúdase si en C. este tiempo está al gouiiiierno del praepósito." "No menos que antes, en lo que no es contra el papa. 21^o. Affirmatiue, no siendo contra el papa."

⁷³ Limits might include a fixed time, or a fixed place for a mission, in which case the general would have the authority to recall the man after the time limit has run out.

he used every means possible to change the mind of the pope so that the decision would be changed. [...] The norm of discernment for all things, therefore—even the wisdom of a papal command—was the apostolic end of the Company, the ‘scope of our vocation.’⁷⁴

And Nadal pointed out that even the notion of the universal good is qualified. In his commentary on the *Constitutions* and *Declarations*, he said that the universal good which should be considered is only that which conforms to our institute:

For there will be many things that will seem to be, and perhaps are in fact, more necessary and more useful for the universal good, which are nevertheless not the Society’s concern, such as governing churches and parishes with care of souls, having care of nuns and similar ministries. [...] Father Ignatius explained it brilliantly [...] it is plain that we must have in view only the universal good which does not disagree with our institute.⁷⁵

This principle of limitation is nothing more than what already has been seen enunciated by Bernard of Clairvaux, “The nature of the monastic profession defines the limit of obedience [...].”⁷⁶ However, it seems to be a moot point, for to suggest that a pope would desire to act in such a manner would seem to be giving papal intervention an importance in the ordinary governance of the Society which the Holy See in fact never claimed and surely would not want.⁷⁷ It must be remembered that in many ways the Society of Jesus was a new entity in the

⁷⁴ FUTRELL, pp. 31–32; his quote from *ConsMHSJ*, 1, p. 160; the emphasis is Futrell’s. Futrell includes a fascinating note: “It is interesting that in the account of his election as general, Ignatius seems to give priority to the confessor in discerning the motions of the Holy Spirit with regard to the personal vocation of his penitent (*FN*, I, p. 19). The passage seems to suggest that the confessor is a more reliable interpreter of the divine will for an individual than is the juridical-hierarchical authority of the Holy See, except when this invokes its plenary Christ-given mandate; for Ignatius adds that he would follow the confessor over the pope unless it would be clear that there would be sin in not following the pope. It is impossible here to pursue the possible implications of this passage; but it would be interesting to reflect upon the suggested tensions between ‘spiritual’ and ‘hierarchical’ authority in finding the will of God for an individual, especially in view of contemporary problems” (*ibid.*, pp.32–33, note 50).

⁷⁵ J. NADAL, *Scholia in constitutiones et declarationes S. P. Ignatii*, Edicione critica, prologo y notas de Manuel Ruiz Jurado, Granada, Facultad de teologia, 1976, p. 178: “Nam intercedent multa, quae videbuntur, et erunt fortassis magis ad bonum universale, vel utilia, quae tamen nihil ad Societatem, ut ecclesiarum gubernationes, et parochiarum cum animarum cura, gubernatio monacharum, et hoc genus alia, [...] tamen luculenter exposuit P. Ignatius [...] ut perspicue intelligeremus ‘ad illud’ bonum universale duntaxat esse nobis spectandum, quod ab instituti nostri ratione non sit alienum.” Trans. in DE ALDAMA, *Missioning*, p. 72.

⁷⁶ BERNARD, in *Opera*, Capvt V., cols., 768–769 (cf. Chapter One).

⁷⁷ After extensive research no such limitation nor intervention can be found to have taken place in the history of

history of the Church. Repeatedly, especially in these early days, questions were explored, and necessary provisions and revisions were made in the developing *Rule* and the *Constitutions* to respond to the “[...] lessons learned through experience and usage.” The specific relationship of the Society to the pope through the mission vow was an innovation to be sure, but the intention has always been to safeguard the “surer direction of the Holy Spirit” in the choice of those apostolic missions. At any rate, the *Constitutions* provide for papal missions, and this is foreseen at the time of the profession which is understood according to the same *Constitutions*.

The final constitution in this Chapter reminds the Jesuit that “[...] it will always be safer for him to confer with his nearest superior about the means to be used.” [635]. But as Nadal points out:

He is not bound to follow the nearest superior’s opinion unless he is subject to him also as regards his mission. But then the one who sends him must specify that he is indeed under the obedience of the nearest rector or superior if not in everything, at least as regards the practice of religious life. Hence, one who is not submitted to a superior’s obedience in matters concerning his mission could still avail himself of his counsel with freedom and humility.⁷⁸

An early draft of the *Constitutions* suggested that the criteria for apostolic selection listed in Chapter two should be applied also to the missions considered in this Chapter, but it was dropped

the Society, except, perhaps, the case where a Jesuit is named a bishop. Such a command by the pope, one which removes a Jesuit the obligations of his religious profession surely would be *contra* or against the rule, or at least *outside* the rule, and quite possibly it would be a contravention of the obligations of justice incumbent upon the one who professes a vow, and upon those with legitimate authority over him. It is at *least* questionable whether a religious could be held to a strict obligation in such a matter. This will be addressed in the next section where the obligation of obedience will be discussed.

⁷⁸ NADAL, *Scholia*, p. 445: “Cum eo superiore. Cuius tamen sententiam non erit necessarium sequi, cum, qui missus est, nisi sit sub illius obedientia, non in aliis solum, sed in ipsa etiam missione. Hoc vero erit indicendum a mittente ut sit missus in obedientia proximi Rectoris vel Praepositi, si non in omnibus, in his saltem quae ad religiosam attinent conversationem et vitam. Poterit igitur eius consilio uti si sub eius non erit obedientia pro suo arbitrio libere, et humiliter in Dno” (trans. in DE ALDAMA, *Missioning*, p. 130). This has been further clarified by an ordinance of the superior general: “Those who are staying in another Province, although not applied to it or who are there but for a short time, depend nevertheless on the superiors of that Province especially in regard to religious discipline and the exercise of their ministry. Superiors are to look after them no less than their own proper subjects with paternal solicitude. If they have come to conduct some business and the local superior whom as far as possible they should consult is not available, they are to follow the direction of the [local] Provincial” (*Practical Compendium of the Law of the Society of Jesus*, trans. into English by the Jesuit Conference of South Asia, Gujarat Sahitya Prakash, Anand-Gujarat, India, 1991, c. 522, p. 274). This ordinance governs as long as it does not conflict with an obedience of the pope, which, of course, takes precedence.

from the final version.⁷⁹ Especially with the passage of time, however, these norms have come to be seen as part of the “Jesuit way of proceeding,” and tend to be broadly rather than strictly applied. But there are three notable norms or elements of discernment listed in the constitution: “[...] after considering the reasons on one side and the other, while praying, and keeping his will indifferent [...], [633], all three of which are found in the *Spiritual Exercises*,⁸⁰ and, again, they apply much more broadly than to the missions discussed in this Chapter.

1. Works Proper to the Society

Three lists of works proper to the Society exist, each having a slightly different order depending on the purpose of the list:

The intention in the *Formula* [1] is to define the specific ministries of the Society; hence the order proceeds from the most to the least appropriate. In Part IV [of the *Constitutions*] the objective is pedagogical, to teach the scholastics how they are to prepare themselves to exercise the ministries of the Society; so the list is ordered according to the intrinsic dignity of the ministries. [...] Here in Part VII the purpose is to indicate the means for helping the neighbour in the houses and colleges of the Society. Presupposing the general division between spiritual ministries and works of mercy, the ministries are ordered according to greater or lesser frequency: going from those which everyone can exercise at all times to those exercised only occasionally and by selected persons.⁸¹

What is fascinating about the ministries included is

[...] the surprising coincidence of these Ignatian lists with the Apostolic Exhortation *Evangelii Nuntiandi* of Paul VI (8 December, 1975). Excepting perhaps prayer, the means listed in the *Constitutions* for helping the neighbour spiritually are the same as those which the pope indicates as means of evangelization.⁸²

⁷⁹ Cf. DE ALDAMA, *Missioning*, p. 128.

⁸⁰ *SpEx*, [179, 180, 181].

⁸¹ DE ALDAMA, *Cons.*, p. 257.

⁸² DE ALDAMA, *Cons.*, p. 258. *Evangelii nuntiandi*, in *AAS*, 68 (1976), pp. 5–76.

The section begins with exhortations to prayer and good example, to be practiced by all [636-641].⁸³ It continues with the administration of the sacraments, especially the hearing of confessions and administering Holy Communion [642-644].⁸⁴ The ministry of the word, which held first place in the *Formula*, is next, with sermons, lectures, the teaching of Christian doctrine, in churches and in public places, spiritual conversations, counseling, exhorting to good works and conducting the *Spiritual Exercises* [645-649]. The list concludes with the “corporal works of mercy,” and, while they are seen as important, they are clearly secondary to “[...] the more important spiritual activities [...]” [650-651].⁸⁵

D. “Chapter 4 Ways in which the houses and colleges can help their fellowmen” [636-654]⁸⁶

Nadal once wrote that “[...] the characteristic and most perfect house of the Society is the journeys of the professed [...],”⁸⁷ and the first three Chapters of Part VII concern themselves with the different ways in which a Jesuit can be sent on such journeys or missions. While the ideal Jesuit is often regarded as one who is “on the road,” practical necessity requires

⁸³ *Evangelii nuntiandi*, no. 41 says: “[...] the witness of an authentically Christian life, given over to God in a communion that nothing should destroy and at the same time given to one’s neighbour with limitless zeal.”

⁸⁴ See *Evangelii nuntiandi*, nos. 20 and 47. “The apostolic Exhortation *Evangelii Nuntiandi* stresses their intimate connection with the ministry of the word, from which they must not be separated” (DE ALDAMA, *Cons.*, p. 259).

⁸⁵ *Evangelii Nuntiandi*, no. 43 begins the section titled, “Liturgy of the Word” with: “This evangelizing preaching takes on many forms, and zeal will inspire the reshaping of them almost indefinitely. [...] It suffices to have true spiritual sensitivity for reading God’s message in events.” Cf. DE ALDAMA, *Missioning*, pp. 133-194; id., *Cons.*, pp. 257-263; LUCAS, pp. 171-172.

⁸⁶ The title of *Chapter 4* is to be understood in the following way: “Or they may carry on their labor, not by travelling but by residing steadily and continually in certain places where much fruit of glory and service to God is expected,” (DE ALDAMA, *Missioning*, p. 6). DE ALDAMA, pp. 4-5, points out that in the 7th *Industria*, Polanco envisaged only the first three titles, but later he distinguished between distribution “[...] in missions where the Society has no residence, [...]” and distribution “[...] in places where it has a stable residence.” See also, *MHSJ Pol Compl II*, p. 753.

⁸⁷ “Ultimam ac perfectissimam Societatis habitationem dicimus peregrinationem professorum [...]” (*MonNad*, 1, p. 195).

that there be some stable residences in the Society. This last Chapter of Part VII considers “[...] the ways in which souls can be helped in those places [...],” [636].

In his commentary on the *Constitutions*, Nadal identified the three types of houses that exist in the Society:

‘When they are dispersed to any part of Christ’s vineyard.’ This dispersion of the professed and coadjutors will indeed take place in the founding of professed houses, and also of the colleges and houses of probation, in important cities as well as in large and populated towns.⁸⁸

In the *Constitutions*, “houses” and “colleges” were written as technical terms:

Houses (*casas, domus*) were dwellings intended chiefly for formed Jesuits who had completed their studies and were engaged in apostolic work while living exclusively on alms, whereas colleges (*colegios, collegia*) were dwellings which could possess fixed or regularly recurring revenues and were intended chiefly for students (*scolares, scholastici*) or professors. [...] Ideally, a house of first probation was to be separated from a house or college but related to it. But if necessary a portion of an existing Jesuit dwelling could be separated off and used for the first probation.⁸⁹

The attitude of the Society towards its houses is best expressed by Nadal:

The houses of the Society should be like a garrison from which the troops go out to make raids and sorties against the enemy and then to return. So, too, from the houses of the Society some will go out here and there to battle against vices and demons, others will return and rest for a while, as Christ our Lord said. They retreat to regain strength and others will take their place.⁹⁰

While it was envisioned that the “professed houses” would be those typical of the Society, things worked out differently. At the time of Ignatius’ death there were only two professed houses, one

⁸⁸ J. NADAL, *Scholia*, p. 175, trans. by O’MALLEY, “To Travel,” pp. 7–8. “DUM DIVIDUNTUR PER CHRISTI VINEAM. Haec distributio professorum, et coadiutorum fiet quidem ad domos professorum fundandas, vel etiam collegia vel probabatione domos in primariis civitatibus, vel magnis et frequentibus oppidis [...].”

⁸⁹ GANSS, *Cons.*, p. 76, note 8.

⁹⁰ *MonNad*, 5, p. 470: “Las casas de la Compañía han de ser como el cuerpo del esquadron, [de] dondesalen los soldados se sacramucar y de hacer algunos saltos contra el enemigo, y después se recojen alli. Assí será que de las casas de la Compañía saldrán a unas partes y a otras los de la Compañía a palear contra los vivos y contra los demonios; y quedarán otros que hagan el cuerpo de la batalla, donde se recogerán las nuestros, et *requiescent pusillum*, como decía Christo nuestro Señor a sus discipulos.” Trans. by DE ALDAMA, *Missioning*, p. 133.

in Rome with sixty Jesuits, and one in Lisbon with twenty-two, while the majority of the professed lived in the forty-six colleges.⁹¹ Thus, this Chapter of the *Constitutions* is directed to the ministries proper to the Society to be undertaken by those in the houses and colleges.

This Chapter four contributes an interesting nuance to the understanding of the notion of “mission.” In a letter to Ferdinand, King of the Romans, written a couple of years after the *Constitutiones circa missiones*, Ignatius said:

This Society and its members have been joined together in one and the same spirit; namely, to travel to various places in the world, among the faithful and the infidel, as we are sent by the Supreme Pontiff. Indeed, it is the spirit of the Society to go in all humility and simplicity from city to city and place to place, without taking root anywhere. [...] To abandon this simplicity of ours would be the undoing of our spirit, of our profession; and this done, the Society would be utterly destroyed. So we see that doing good in a particular place would involve greater harm to the whole body.⁹²

In light of this statement, de Aldama asks the question: “[...] does this scattering and division envisage temporal missions only, or does it *also* include being sent to found a house of the Society, for instance?”⁹³ He goes on to point out that from the beginning Ignatius and the companions thought of having a church and a residence, and thus, “[...] we can see no reason why the ‘scattering’ and ‘division’ left to the pope should not include these support bases (‘castra,’ winter barracks, as Suarez called them).”⁹⁴ Polanco also made references to men who were sent on “missions” to places where the Society had no colleges:

⁹¹ A problem existed in that many Jesuits lived in the colleges with ministry elsewhere, thus seemingly benefiting from the colleges’ fixed revenues, contrary to the bulls *Regimini* [5], *Exposcit* [5], and other internal legislation. Ignatius died before he could update the laws, and it was left to the Sixth General Congregation (decree 18) to resolve the issue: “How the professed not needed in the colleges are to be transferred, given the small numbers of professed houses” (J. PADBERG et al, *For Matters of Greater Moment: The First Thirty Jesuit General Congregations. A Brief History and a Translation of the Decrees [= Greater Moment]*, St. Louis, IJS, 1994, p. 223). Cf. also GANSS, *Cons.*, p. 166, note 19.

⁹² YOUNG, *Letters*, p. 112. Cf. DE ALDAMA, *Missioning*, pp. 26–29.

⁹³ DE ALDAMA, *Missioning*, p. 27.

⁹⁴ *Ibid.* Cf. SUAREZ, *De Soc.*, Bk. 4, ch. 15, no. 445.

[...] the fourth was of 12 men sent to Germany, 'partly to increase the college of Munich and partly to start one in Trnava (then Hungary, since 1918 in Czechoslovakia [now the Slovak Republic]); the fifth, of those sent to the new college of Trier; the sixth, to the new college in Como in Lombardy' Ignatius himself used a few times the expression 'to send to a college.'⁹⁵

The clarification is added that such a mission should cease "[...] as soon as those sent to found a house have settled there [...]" and that "[...] 'these members, wherever they are, will always be at the disposal of His Holiness' ([618])."⁹⁶

Nadal, in his *Scholion*, provides a wonderful clarification on this issue:

[...] the obligation of the fourth vow refers exclusively to the missions as such. It refers, so to speak, to the distribution of workers in the Lord's vineyard, whether the Supreme Pontiff sends them to found a house or college, or to other parts of the world, or to carry out ministries for the salvation of souls or for the defense and propagation of the faith. These missions are the Church's official work, and hence they belong to the Vicar of Christ. For in general, it is the Supreme Pontiff's responsibility to see that souls do not perish out of negligence or lack of workers (where there are no bishops, and not where there are). This is why it was eminently reasonable that this primary point of our institute should be observed not only out of the common obedience we owe to the pope or the obedience we owe to our superiors, but offering it to the supreme Vicar of Christ through a distinct and special religious vow. This way we can proceed more correctly and also more devoutly and fruitfully. For the rest, the words of confirmation (of the Society, i.e., the *Formula of the Institute*) must not be given a different interpretation.⁹⁷

⁹⁵ DE ALDAMA, *Missioning*, pp. 27-28. Cf. *MHSJ, PolComp*, I, pp. 222-226; and *EppIgn*, VI, p. 666, X, p. 347, XI, p. 546.

⁹⁶ DE ALDAMA, *Missioning*, p. 28.

⁹⁷ NADAL, *Scholion*, no. 605, pp. 440: "AD LOCUM ALIQUEM PARTICULAREM. Non refertur haec 4^a voti obligatio nisi ad missiones ipsas, [v.] qua huiusmodi, quasi si dicas, ad distributionem operariorum in vineam Domini, sive ad domum aliquam fundandam, vel etiam collegium mittere velit Summus Pont., sive ad alias partes in totum terrarum orbem ad ministeria, quae ad salutem animarum, ad fidei defensionem, vel propagationem conferantur. Reliqua enim quasi privata sunt munia Societatis, Missiones vero illae munus sunt Ecclesiae publicum, atque adeo quod ad Vicarium Xⁱ attineat. Etenim Summo Pont. incumbit, in universum ut vel negligentia, vel penuria operariorum animae ne pereant, vel periclitentur, non tantum ubi Episcopi sed ubi nulli sunt. Quare fuit rationi consentaneum, ut caput hoc nostri Instituti primum non tantum ex communi obedientia Summi Pontificis vel ex sola Praelatorum nostrorum obedientia obiremus, sed religiosa voti obligatione, quam selecte Summo Christi Vicario praestaremus, quo et certissime ageremus, et maiori etiam cum devotione ac fructu. Neque aliorum sunt verba confirmationis interpretanda." Trans. from DE ALDAMA, *Missioning*, p. 28. DE ALDAMA points out that B. DE MARGERIE, "El cuarto voto de la Compañía de Jesús según Nadal," in *Manresa*, 42 (1970), pp. 359-376, "[...] omits precisely this *scholion* and the one on the *declaration* [529], which are the two most important texts to know Nadal's mind about the matter of the fourth vow" (*ibid.*, p. 28, note 110).

This statement highlights, once again, the special character of the fourth vow in the minds of the early companions. But notice the distinction made here by Nadal. The primary point of our institute, to help souls, is observed first of all because of the *common* obedience we owe to the pope *or* the obedience we owe to our superiors. But more: this special “religious vow,” which, like all religious vows, is interpreted according to the *rule*, is motivated to ensure that as we carry out the Church’s official work which “[...] belong to the Vicar of Christ [...],” we may proceed more correctly and fruitfully, and in this way observe the primary point of the institute, to help souls.

In the previous Chapter it was pointed out that the 1550 *Formula of the Institute* said that:

This superior general, with the council of his associates (with the majority of votes always having the right to prevail), shall possess the authority to compose *Constitutions* leading to the achievement of this end which has been proposed to us. He shall also have the authority to explain officially doubts which may arise in connection with our institute as comprised in this *Formula*.⁹⁸

Keeping in mind, also, the principle that “ecclesiastical laws are to be understood in accord with the proper meaning of the words considered in their text and context,”⁹⁹ it would be helpful at this point to examine more closely how the early companions understood the meaning of the word “mission.”

1. The Meaning of “mission”

A. de Aldama presents a helpful synopsis, not only of the historical development and usage of “mission,” but more important to this study, its use in the foundational documents of

⁹⁸ Trans. by DE ALDAMA, *Formula*, p. 5.

⁹⁹ *CIC 83*, c. 17.

the Society.¹⁰⁰ After considering de Aldama's contribution, J. O'Malley's insightful reflections will be added.

De Aldama begins with the two meanings of *missio* in classical Latin: "dismissal, release" (= "*missio gladiatoris*," "*manu missio*," "*ite, missa est*"), and the derived meaning, "sending," which was applied both to things and persons (= "*missio litterarum*," "*missio legatorum*"). He moves to the Middle Ages where the term was already applied to preaching with the juridical meaning found in canon 1328 of the 1917 Code of Canon Law, i.e., a mandate or commission to preach, positively mandated by ecclesiastical authority.¹⁰¹ Rupert of Deutz is quoted: "Bishops send (*mittunt*) presbyters when they ordain them. The monk is exempted from this mission (*hac missione immunis est*) when he has not exercised sacred orders." And Pope Lucius III (1181–1185) condemned, "[...] those who had the presumption to preach '*non missi*,' without being sent."¹⁰² De Aldama says that today the ordinary meaning of mission has been extended to apply to any "commission, mandate or charge," and even to mean "[...] somebody's mission in the world, thereby meaning his vocation or destiny."¹⁰³

While in the Vulgate translation of Scripture one can find the verb *mittere*, but not the noun *missio*, the notion has great significance in the New Testament, reaffirmed by the Second Vatican Council where it "[...] highlighted the 'missionary' character of the Church and its relation with the 'mission' of Christ and the 'mission' of the Holy Spirit."¹⁰⁴ F. Bourdeau points out that there has been an artificial opposition between the words "mission" and

¹⁰⁰ DE ALDAMA, *Missioning*, pp. 7–12, and pp. 31–33. Since this term is so central to this topic it would be helpful to precis DE ALDAMA'S presentation.

¹⁰¹ "*Nemini ministerium praedicationis licet exercere, nisi a legitimo Superiore missionem receperit, facultate peculiariter data, vel officio collato, cui ex sacris canonibus praedicandi munus inhaereat*" (CIC 17, c. 1328).

¹⁰² See DE ALDAMA, *Missioning*, p. 8, note 4: "Denz.—Schöm., no. 761."

¹⁰³ DE ALDAMA, *Missioning*, p. 8.

¹⁰⁴ DE ALDAMA, *Missioning*, p. 8, and his note 6 which refers to LG 17 and AG 2–9.

“apostolate,” since the Vulgate use of *mittere* translates precisely to the greek *apostellein*.¹⁰⁵ In a section of his work entitled “The Vicissitudes of the Word Mission”¹⁰⁶ Bourdeau proposes that the word vegetated for fifteen centuries. During the Middle Ages the word *missio* was happily applied to the Divine Persons, but much less to the apostles. He says that the word came into its own in the mid-sixteenth century with the “mission vow” and the *Constitutions Regarding Missions of the Jesuits*.¹⁰⁷

A. Haas and P. Knauer point out that Ignatius was aware of the theological character of the word “mission.” In 1544 he wrote in his Spiritual Journal:

At this moment other lights came to me, namely, how the Son first sent the apostles to preach in poverty, and afterwards, the Holy Spirit, giving His Spirit and the gift of tongues, confirmed them, and thus the Father and the Son sending the Holy Spirit, all Three Persons confirmed the mission.¹⁰⁸

This moment of inspiration came while Ignatius was:

[...] poring over the ‘reasons he had written down’ in the *Deliberation on Poverty*, one of which said that this was the poverty that ‘our common Lord Jesus took for himself and showed or taught his dear apostles and disciples when he sent them to preach’ with which words he was referring, no doubt, to chapter 10 of St. Matthew.¹⁰⁹

¹⁰⁵ “L’opposition relative entre apostolat et mission (tout apostolat ne serait pas mission) apparaît tout aussi factice, puisque «mission» s’enracine dans le Nouveau Testament par le verbe *mittere* de la Vulgate (ideo *missus* sum [...], sicut *misit* me Pater et Ego mitto vos) qui traduit précisément le grec *apostellein*” (F. BOURDEAU, “Le vocabulaire de la mission” [= BOURDEAU], in *Parole et Mission*, 3 [1960], p. 11).

¹⁰⁶ “Les aventures du mot mission” (BOURDEAU, p. 11).

¹⁰⁷ “Ainsi les mots mission (*missio*) et missionnaire (*missus*), objet principal de cette enquête, malgré leur caution scripturaire, ont végété pendant quinze siècles. [...] Le Moyen Age applique volontiers le mot *missio* à l’envoi des Personnes divines (missions trinitaires) mais fort peu ‘à l’envoi des apôtres. *Missio* trouve enfin sa chance au milieu du XVI^e siècle (époque de ressourcement classique et de doublets) avec le *votum de missionibus* et les *Constitutiones circa missiones* (1544–1545) des jésuites” (BOURDEAU, pp. 11–12).

¹⁰⁸ “[...] en esto veniéndome otras inteligencias, es a saver, cómo el Hijo primero yñbió en pobreza a predicar a los apóstoles, y después el Espíritu Santo, dando su espíritu y lenguas los confirmó, y así el Padre y el Hijo inbiando el Espíritu Sancto, todas tres personas confirmaron la tal misión” (cf. *ConsMHSJ*, 1, pp. 90–91, entry for 11 February 1544. DE ALDAMA, *Missioning*, p. 8).

¹⁰⁹ DE ALDAMA, *Missioning*, p. 9.

On this passage from the Spiritual Diary, Haas and Knauer comment:

This simple phrase contains a magnificent theology of the apostolic mission that should be analysed in detail. The apostolic mission of Jesus' disciples (and all those who are sent in the name of Jesus) is considered under three aspects: the mission communicated by Christ; the confirmation of this mission by the Holy Spirit, who confers on the mission the interior spirit and the external power of the word; and that these two, the mission communicated by the Son and the confirmation and power conferred by the Spirit are not, in the last analysis, but the extension 'ad extra' of the trinitarian relations, namely, of the "spiratio" or breath by which the Father and the Son eternally produce the Holy Spirit, that is to say, they "send him."¹¹⁰

De Aldama concludes with the following:

The first time that the noun 'mission' comes up in Ignatius' writings is in the *Formula of the Institute*. After explaining the special vow of obedience to the pope, to go 'to whatsoever province he may choose to send us' [4], he adds in [5] that no one should ambition 'such missions or provinces' nor should he refuse them, and should not either directly or indirectly 'carry on negotiations with the Roman Pontiff about such missions,' i.e., trying personally to be sent. It was the formulation of the decision taken by the companions on 3 May 1539 and confirmed the following day: that if anyone desired to go to one province more than to another, whether to the faithful or to the infidels, he could not approach the Roman Pontiff either by himself or through someone else, 'ut ab ipso mittatur,' in order to be sent.

It is clear, then, that the meaning of 'mission' in the *Formula of the Institute* is that of 'sending.' This was also therefore the meaning it had in the profession they made at St. Paul Outside-the-Walls on 22 April 1541 when they vowed: 'Insuper promitto specialem oboedientiam Summo Pontifici circa *missiones in bulla contentas*'.¹¹¹

This is also the meaning of the word 'mission' in the *Constitutiones circa missiones* [...] The word 'mission' keeps this meaning of 'sending' in the definitive *Constitutions*, [...] Finally, this is also the meaning Nadal gave to the word, at least in his older writings, applying it to all kinds of appointments. One of his numerous instructions bears the title 'De missionibus' and deals not only with sending Jesuits to preach but also for probation, pilgrimages, to other colleges [...].¹¹²

¹¹⁰ A. Haas & P. Knauer, *Ignatius von Loyola. Das Geistliche Tagebuch*, Freiburg [im Breisgau], Herder, 1961, p. 250, note 3 (trans. by DE ALDAMA, in *Missioning*, pp. 8-9).

¹¹¹ DE ALDAMA, *Missioning*, p. 9, emphasis is his. On p. 9, note 13, he quotes from *ConsMHSJ*, 2, p. lxxiv, "Quando autem Constitutiones in hac prima origina septimae partis de missione loquuntur, actum mittendi significant, sicut lectio est actus legendi, monitio actus monendi et ita porro."

¹¹² DE ALDAMA, *Missioning*, pp. 9-10. The Nadal quote is taken from *MonNad*, 4, pp. 503-505; 557, 633.

On this line, J. O'Malley, in an excellent study on the writings of J. Nadal, makes three further significant contributions.¹¹³ The first pertains to the notion of the "houses" of the Society; the second to the understanding of the word "mission," and the third records the link of these two ideas to the fourth vow.

When listing the kinds of houses or dwellings of the Society, Nadal states: "These are: the house of probation, the college, the professed house, and the journey—and by this last the whole world becomes our house."¹¹⁴ It is clear that this is not a stray reference, in that Nadal returns to this idea many times and with even greater insistence. Nadal also equates the Latin term "*habitatio*" with "*casa*" thus eliminating any confusion that might be raised in that regard: "There are missions, which are for the whole world, which is our house. Wherever there is need or greater utility for our ministries, there is our house."¹¹⁵

O'Malley tells us that the Spanish word "*misiones*" is used as the equivalent for the Latin "*peregrinationes*" and that both are difficult to translate into English with all the nuances they deserve. He reluctantly settles for "journey," but points out that this word:

[...] must be understood as bearing with it the idea of pilgrimage, with its hardships, deprivations, and spiritual goals, and the idea of mission or being commissioned, with ministry as its purpose. Thus 'journey,' 'pilgrimage,' and 'mission' become, in practice, synonyms.¹¹⁶

The third contribution of O'Malley points out where Nadal links the two notions mentioned above to the fourth vow:

¹¹³ J. O'MALLEY, *To Travel* pp. 1-20.

¹¹⁴ "Notandum diversa esse in Societate mansionum seu habitationum genera. Est enim domus probationis, collegium, domus professorum, peregrinatio; et hac ultima totus mundus nostra fit habitatio" (O'MALLEY, "To Travel," p. 6, from *MonNad*, 5, p. 54).

¹¹⁵ "Ay misiones, que es por todo el mundo, y es nuestra casa. Donde ay necesidad o mas utilidad nuestros ministerios, af es nuestra casa" (O'MALLEY, "To Travel," p. 6, from *MonNad*, 5, pp. 469-470).

¹¹⁶ O'MALLEY, "To Travel," pp. 6, 11. Cf. also M. SCADUTO, "La strada e i primi Gesuiti," in *AHSJ*, 40 (1971), pp. 323-390, in which he too confirms that for the early Jesuits the words "journey," "pilgrimage" and "mission" were practically synonymous.

The principal and most characteristic dwelling for Jesuits is not in the professed houses, but in journeyings, [...] I declare that the characteristic and most perfect house of the Society is the journeys of the professed, by which they diligently seek to gain for Christ the sheep that are perishing. And this is indeed the distinctive mark of our vocation: That we accept from God and the orthodox Church the care of those for whom nobody is caring, even if there actually is somebody who ought to be caring for them. And if there is nobody else, surely the supreme Vicar of Christ, the Roman Pontiff, [has them in his care]. To him, therefore, we are given in service, that through us he might care for those for whom their ordinaries or priests are of no avail, or especially those who altogether lack an ordinary. To this end looks our vow that is made to the Supreme Pontiff, which specifically concerns 'missions.'¹¹⁷

And later,

There are the houses of the professed, where the ministries of the Society for the help of souls are exercised. Is there more? Yes, the best: the 'missions' on which the pope or superior sends us, so that for the Society the whole world will become its house, and thus it will be with the divine grace.¹¹⁸

Of the world as our house Nadal says:

That is altogether the most ample place and reaches as far as the globe itself. For wherever they can be sent in ministry to bring aid to souls, that is the most glorious and longed-for 'house' for these theologians. For they know the goal set before them: to procure the salvation and perfection of all men. They understand that they are to that end bound by that fourth vow to the Supreme Pontiff: that they might go on these universal missions for the good of souls by his command, which by divine decree extends throughout the whole Church. They realize that they cannot build or acquire enough houses to be able from nearby to run out to the combat. Since that is the case, they consider that they are in their most peaceful and pleasant house when they are constantly on the move, when they travel throughout the earth, when they have no place to call their own, when they are always in need, always in want—only let them strive

¹¹⁷ "In domibus professis non est ultima vel etiam potissima habitatio Societatis, sed in peregrinationibus, [...] Ultimam ac perfectissimam Societatis habitationem dicimus peregrinationem professorum; qua peregrinatione eas oves quae pereunt disquirantur sollicite Christo lucrificari. Et haec est quidem selecta vocationis nostrae proprietas, ut eorum curam a Deo acceperimus et ab orthodoxa Ecclesia, quos nullus curat, tametsi aliquis sit omnino qui curare deberet. Quod si alius nullus, certe summus Christi Vicarius, Romanus Pontifex. Huic igitur in obsequium dati sumus, ut per nos illorum gerat curam quibus vel ordinarii praelati vel sacerdotes non prosunt, vel omnino qui nullum habent praelatum. Huc spectat votum quod fit Summo Pontifici, quod proprie ad missiones attinet" (O'MALLEY, "To Travel," p. 7, from *MonNad*, 5, pp. 195-196).

¹¹⁸ "Ay cassas [sic] de professos, donde se exercitan los ministerios de la Compañía para el ayuda de las almas. ¿Queda más? Si, lo mejor, las misiones a do embía el Papa o el superior; que a la Compañía todo el mundo le a de ser casa, y assí sera con la gracia divina" (O'MALLEY, "To Travel," p. 7, from *MonNad*, 5, pp. 364-365).

in some small way to imitate Christ Jesus, who had nowhere on which to lay his head and who spent all his years of preaching in journey.¹¹⁹

These references to Nadal's thinking firmly place the fourth vow in a context of "mission for ministry" and remind us of one of the purposes of the fourth vow, the "sure direction of the Holy Spirit" in the selection of apostolic ministry which is consistent with Ignatius' world view and his understanding of the way obedience works. As O'Malley says:

When St. Ignatius spoke of the fourth vow as 'nuestro principio y principal fundamento'¹²⁰ he could hardly have been referring to some general esteem for the papacy, which he surely had, but to something that was more obviously operative at the centre of the Jesuit vocation. He was referring, it would seem, to that commitment to ministry that appears on practically every page of the twelve volumes of his correspondence. Our 'first principle and foundation' is not loyalty to the papacy, but a commitment to ministry any place in the world where there is hope of God's greater service; a mission from the pope, the 'Universal Pastor,' is the most dramatic and peremptory expression of that commitment. Nadal's commentary on the houses of the Society and their relationship to the vow confirm this interpretation of *Exposcit debitum* as well as of the Ignatian texts.¹²¹

This contribution of O'Malley also serves to point out something else. The fourth vow as our first principle and foundation also influences almost every structure and practice of the Society. The testing and formation of candidates is designed and undertaken with missionary mobility in mind;

¹¹⁹ "Ille est locus longe amplissimus et tam late patens quam orbis universus; quocumque enim in ministerium ad opem animabus ferendam mitti possunt, haec est horum theologorum habitatio praestantissima atque optatissima; sciunt enim esse sibi finem praestitutum, ut salutem omnium animarum procurent et perfectionem. Intelligunt propterea se voto illo quarto Pontifici Maximo esse obstrictos, ut universales missiones in animarum subsidium obeant ex illius imperio, quod est divinitus in universam Ecclesiam constitutum. Vident se tot domus vel aedificare vel obtinere non posse, ut ex propinquo excurrere ad pugnam possint. Haec quum ita sint, illam reputant esse quietissimam atque amoenissimam habitationem, si perpetuo peregrinari, orbem terrarum circumire, nullibi in suo habitare, semper esse egenos, semper mendicos, modo minima aliqua ex parte enitantur Christum Iesum imitari, qui non habebat ubi caput reclinaret, et totum tempus suae praedicationis in peregrinationibus exegit" (O'MALLEY, "To Travel," p. 8, from *MonNad*, 5, pp. 773-774). Cf. also pp. 442-444, and 4, pp. 178-180.

¹²⁰ O'MALLEY, "To Travel," p. 10, from *ConsMHSJ*, 1, p. 162.

¹²¹ O'MALLEY, "To Travel," p. 10. Cf. also O'MALLEY, *The First Jesuits*, especially Chapter 8, "The Jesuits and the Church at Large," where he treats the relationship of Ignatius and the Early Society with the pope and the Holy See. Cf. also O'MALLEY, "The Fourth Vow in its Ignatian Context: A Historical Study," in *SSJ*, 15-1 (January 1983), 62 p.; and PADBERG, "Realistic Reverence," especially p. 20 ff., "Ignatius as General: Examples of His Relations with the Popes."

the Society's poverty is "apostolic";¹²² the exemption from choir [586], the freedom from the direction of religious women [588], the avoidance of perpetual Mass obligations [589], and the avoidance of dignities outside the Society [756, 771, 786] are all expressly motivated to protect "[...] the liberty that is necessary for our manner of proceeding in the Lord," namely, mission. Thus, it can be said that the fourth vow expresses the essential nature of the Society, such that all other structures, as far as possible, are designed and interpreted to protect its fundamental end and goal.

PART III. The Third Vow in the *Constitutions*

Part VI of the *Constitutions* treats the obligations of the three vows of religion and it is in Chapter 1 [547-552]¹²³ where is found a compressed, but thorough treatment of evangelical obedience—what has been called "corporative" obedience,¹²⁴ to distinguish it from the fourth vow, obedience with regard to missions, which was just considered. After the presentation of themselves to the pope in Rome, the companions realized that they faced a life of separation due to apostolic journeys, and this without many of the traditional means used in a religious institute to foster union, "[...] such as monastic stability, living together under the same roof, choral or communal prayer, conventual chapter and the like."¹²⁵ In such circumstances they felt concern regarding how they were to maintain the union and even the preservation of the company, so they

¹²² See GC 32, D. 12, no. 9.

¹²³ Chapter 1 of Part VI of the *Constitutions* is entitled: "The personal life of those already admitted or incorporated into the Society." It is interesting to point out that the lone sentence in the *Constitutions* which deals with chastity precedes the section on obedience, where Ignatius says only that Jesuits are "[...] to imitate the angelic purity by the purity of the body and the mind" ([547]).

¹²⁴ DE ALDAMA, *Cons.*, p. 218, note 16, points out that the notion of "two lines of obedience" was first implied by P. BLIET, in *AHSJ*, 25 (1956), pp. 514-530; pointed out by L. MENDIZÁBAL, "Sentido íntimo de la obediencia Ignaciana," in *Manresa*, 37 (1965), pp. 53-76, and picked up by I. ITURRIOZ, in his "Dos líneas de obediencia en la Compañía de Jesús," in *Manresa*, 43, (1971), pp. 59-78. This notion will return in the next Chapter in a discussion provoked by J. G. GERHARTZ.

¹²⁵ DE ALDAMA, *Cons.*, p. 265.

held the *Deliberations* to address the issues. The decision to profess obedience to one of their own number was seen as the best solution to their problems. As de Aldama says:

The solution reached in the *Deliberations* of 1539 was to sacrifice neither union for dispersion nor dispersion for union, but to reinforce union so that it would remain firm in dispersion: founding a spiritual community based on apostolic dispersion.¹²⁶

Thus, Part VIII of the *Constitutions* [655–718], entitled: “Helps toward uniting the distant members with their head and among themselves,”¹²⁷ also contributes to the understanding of obedience.

In light of Ignatius’ personal history, and after having seen something of the evolution and the companion’s commitment to the missionary matter of the fourth vow, it comes as no surprise that the first and most important facet of Ignatian obedience is its apostolic, pastoral nature.¹²⁸ Ignatius’ fundamental dedication to labouring for the good of his neighbour, to help souls, coloured all his subsequent decisions, and he understood, structured and applied obedience in light of its apostolic, ministerial efficacy. In the words of T. O’Gorman, “[...] the apostolate pertains to the very end of the Society, and thus pervades the whole life of the Society [...]”¹²⁹ J. Futrell captures it best where he says: “For Ignatius the essential meaning of obedience was precisely this function of unifying all the members of the Company in an apostolic community

¹²⁶ DE ALDAMA, *Cons.*, pp. 265–266. Cf. O’GORMAN, pp. 28–29; L. RENARD, “Un type d’appartenance communautaire dans la vie consacrée apostolique,” in *NounRevTheol*, 95 (1974), pp. 61–88; and the *Deliberations*, [7–8].

¹²⁷ GANSS, *Cons.*, p. 285.

¹²⁸ T. H. O’GORMAN, *Jesuit Obedience from Life to Law: the Development of the Ignatian Idea of Obedience in the Jesuit Constitutions, 1539–1556*, (= O’GORMAN), [Manila] Loyola House of Studies, Ateneo de Manila Univ., 1971, in his section entitled “Thematic Summary,” pp. 28–35, traces the idea of evangelical obedience through early editions of the *Constitutions* and letters of Ignatius, to identify several “principal characteristics of Jesuit obedience”: the apostolate; union and its preservation; subordination of some members to others; humility and abnegation; Christ in the superior; blind obedience, grades of obedience, representation; and communication.

¹²⁹ O’GORMAN, p. 29.

of love."¹³⁰ He says that the essential end of any apostolic religious, the very "scope of our vocation," is "[...] to serve Christ through the aid of souls in companionship."¹³¹

Now, everything involved in the scope of our vocation is implicit in this phrase: (1) the personal love and commitment to Christ in faith of each individual Jesuit, nurtured in his prayer and realized in his holiness, which is the foundation of his individual vocation to the Company: to serve Christ; (2) the fact that in the Company this personal love of Christ is to be concretized in the active apostolic work of proclaiming the Kingdom of Christ to men and women in word and deed and life: through the aid of souls; (3) and the fact that in the Company this apostolic service of Christ is to be done in community in order to exercise the apostolate more effectively through the united force of a group of dedicated companions than it could be done individually: in companionship. This 'in companionship' ideal also implicitly contains all that is involved in community life and work and the entire structure of authority and obedience.¹³²

Futrell lists three "specifying notes" of this apostolic approach of the Society: "(1) the constant dynamic thrust to ever greater service of Christ; (2) immediate service of the Church at the direction of the Vicar of Christ; (3) mobility."¹³³

¹³⁰ FUTRELL goes on to cite texts to support his view: "Candidates are admitted into the Company 'for entire obedience and corporate living in our Lord' [*ConsMHSJ*, 2, p. 114. See *ConsMHSJ*, 1, pp. 247, 249, 254; II, pp. 40, 114]. An obvious impediment to entrance into the Company would be a temperament which makes it impossible for a man 'to dispose himself to live in the manner of the Company and to be obedient' [*ConsMHSJ*, 2, p. 145]. Members of the Company are identified in the fourth bull of PAUL III as all those who are committed to obedience to the general of the Company [*ConsMHSJ*, 1, pp. 358, 359, 369]. Full incorporation in the Company is effected by commitment to obedience [*ConsMHSJ*, 2, pp. 145, 197, 204, 222, 230, 242, 638]. The essentially unifying end of Jesuit obedience is made explicit in passages treating obedience as the primary means to union [*ConsMHSJ*, 1, pp. 4, 5, 6, 7, 16; II, pp. 226, 255-256, 312, 616. See FUTRELL's ch. 2, p. 52]. That the mental structure of Ignatius identified 'love and obedience and union' [*ConsMHSJ*, II, p. 616] is especially clear in the VIIIth and Xth Parts of the *Constitutions*. 'Because this union is constituted in large part through the virtue of obedience, it should be maintained always in full vitality' [*ConsMHSJ*, 2, p. 226]. This union is effected by 'the bond of wills which is charity and love of one another' (p. 225, a), while the primary means to it is 'the bond of obedience which unites the companions with their superiors and with one another, local superiors with the provincials, and all with the general' (256, a). [See FUTRELL Chapter 3, pp. 79-83; Chapter 4, pp. 84-93]. It is difficult to conceive of a clearer enunciation of the fact that Jesuit obedience is not an end in itself, but rather, the most important means to make a community of love for the service of Christ through the aid of souls in companionship. Through their perfect obedience to the unifying commands of their superior, the companions enable him to fulfil his role of making an apostolic community of love" (FUTRELL, p. 158).

¹³¹ FUTRELL, p. 14. He says that: "In the early documents of the Society, the expression *scopus vocationis nostrae* refers to the specific end of the Society, its particular charism, that which, according to the Decree on Religious Life of Vatican Council II, must be authentically renewed."

¹³² FUTRELL, pp. 14-15.

¹³³ FUTRELL, p. 15.

Since the *Constitutions* are normative for an interpretation of Ignatian obedience, let the study begin with them.¹³⁴ Four ideas can be identified in Part VI: “[...] (i) the fundamental principle of obedience, (ii) the spirit with which it ought to be observed, (iii) its field of extension, and (iv) the manner of observing the virtue.”¹³⁵ From the first extensive entry of the first Chapter Ignatius maintains as the fundamental principle of obedience the traditional understanding that the superior holds the place of Christ:

[...] They [Jesuits] should keep in view God our Creator and Lord, for whom such obedience is practiced, and they should endeavor to proceed in a spirit of love and not as men troubled by fear [...] Consequently, in all things into which obedience can with charity be extended, we should be ready to receive its command just as if it were coming from Christ our Savior, since we are practicing the obedience to one in His place and because of love and reverence to Him [...] [547].¹³⁶

“Thus the ‘voice of obedience’ is in reality the voice of Christ [...],”¹³⁷ and “[...] in any decision the superior makes, the goal to be attained is really the will of God our Creator and Lord.”¹³⁸ This attempt to see and to do the will of God through the structures of obedience

¹³⁴ The *Constitutions*, [547–552], written in 1556, present Ignatius’ final, most thorough and most compressed expression of obedience. O’GORMAN notes that no one document of the period presented an exhaustive treatment of obedience, but as Ignatius addressed various difficulties which arose, the elements of his responses were incorporated into the entire life of the Society. The three most important of Ignatius’ letters on obedience were those to the communities of Gandia in 1547 and Coimbra in 1548 (found in *MI, Eppign.*, I, pp. 551–562, and 687–693); and the letter on obedience to the companions in Portugal dated March 26 1553 (see the classical work, *Perfect Obedience*). It is rightly pointed out that “[e]ven the most modern commentators on Jesuit obedience have tended to consider this [1553] letter as the final step in a process of evolution in Ignatius’ conception of obedience and, therefore, to interpret the *Constitutions* in the light of this letter. Actually, the letters and also the biographical anecdotes concerning Ignatius’ manner of government during his own generalate must be interpreted in the light of the presentation of obedience in the *Constitutions* in order truly to understand them. [...] this letter is an exercise in rhetoric. It is an effort to persuade a particular group of individuals having very definite difficulties and susceptible to a specific kind of motivation” (FUTRELL, p. 195 ff.). While these circumstances helped to develop the notion of obedience, the *Constitutions* remain normative for its interpretation. For a summary of the crisis which occasioned the writing of the 1553 letter, cf. FUTRELL, p. 197 ff., and O’MAHONEY, *The First Jesuits*, p. 329 ff.

¹³⁵ DE ALDAMA, *Cons.*, p. 219.

¹³⁶ Cf. L. MENDIZÁBAL, “Riqueza eclesial y teológica de la obediencia ignaciana,” in *Manresa*, 36 (1964), pp. 283–302.

¹³⁷ O’GORMAN, p. 32, from *ConsMHSJ*, 1, pp. 67–68.

¹³⁸ O’GORMAN, p. 67.

means that obedience is, in effect, a process of discernment. On the part of the subject, he should obey, not only out of love and reverence for Christ, but also out of love and reverence for the superior because he stands in Christ's place [551]. "Effectively, he [the superior] governs by virtue of the authority received from Christ."¹³⁹

The constitution says that the spirit of obedience is that of love, and not of fear: "[...] from their hearts they should warmly love their superiors as fathers in Him" [551]. Nadal captured the tone of this voice of obedience, balanced between firmness and sweetness:

It was firm in the general goals to be achieved, but mild or sweet in dealing with the individuals concerned, in taking account of their physical and psychological situation by showing patience and moderation toward them and making ample use, when necessary, of epikeia and dispensations from general norms.¹⁴⁰

For this reason Ignatius prescribed that the *Constitutions* do not oblige under pain of sin.¹⁴¹ As P. H. Kolvenbach points out:

Ignatius did not want to construct a framework once and for all, but rather to chart a course in which the companion, with his personal freedom and responsibility, would see himself continually drawn by the Spirit of the Lord bringing to fulfilment his work in the world.¹⁴²

It is in this sense that the *Constitutions* have been called an unfinished work.

Insistence that the *Constitutions* do not constitute a finished document is not merely an historical observation; it is central to a proper understanding of

¹³⁹ DE ALDAMA, *Cons.*, p. 219. "The Letter on Obedience says, 'From whom all ordered authority comes down.' It is also the reason adduced by Suarez (*De Soc.*, Bk. 4, Chapter 15, no. 14)." Cf. also, *Documents of the 31st and 32nd General Congregations of the Society of Jesus (=Documents)*, ed., J. PADBERG, St. Louis, *IJS*, 1977, Decree 17, no. 3, citing Polanco, *Fontes narrativi*, I, p. 204; *Deliberations*, I, p. 4.; *Gen Examen*, [83, 85]; *Cons.*, [286, 424, 547, 551]. References to the decrees of General Congregation 31 will be cited as GC 31; those of the Thirty-Second General Congregation will be cited as GC 32, etc., and a Decree will be cited as D.

¹⁴⁰ *MonNad*, 4, pp. 430, 514-515; V, p. 727; NADAL, *Pláticas*, p. 177, in O'MALLEY, *The First Jesuits*, p. 354, and his notes 146, 147.

¹⁴¹ See *Cons.*, [602].

¹⁴² P. H. KOLVENBACH, at the Fall, 1993 *tempo forte*, (= KOLVENBACH, *tempo forte*) in *SJ News and Features*, vol. 21-no. 5 (Sept-Oct. 1993), pp. 79-80. A *tempo forte* is a meeting held three times a year, in January, June and September, convened by the superior general with the assistants, counsellors and secretaries of the general curia for evaluation, orientation and discussion.

them. They are not, in fact, a 'letter' to be reproduced from generation; rather, they articulate a dynamism which must be realized through unceasing renewal.¹⁴³

Ignatius helped to protect this dynamism by empowering superiors with great discretion to dispense from the *Constitutions* and to use their own judgement saying: " 'You who are on the scene of the work will see better what should be done' (*vos que estáis al pie de la obra, veréis mejor lo que se debe hacer*), and even giving [to superiors on the scene of the work] blank sheets with his signature."¹⁴⁴ Lafnez once remarked that "[...] observance, generally to be commended, in some cases impedes the better service of God, which is what the *Constitutions* and all the rules ultimately look to."¹⁴⁵ This is, of course, the way in which the Society addressed the issue first faced by the friars: how to structure obedience for religious who forego the stability of the monastery so as to be actively engaged in their mission in the world. What was begun by Francis and Dominic was brought to a certain completion by Ignatius, who prepared his apostles, and structured the institute for the autonomy necessary to undertake their apostolic mission.

A. The Obligation of Obedience:

The same introductory constitution says:

All should keep their resolution firm to observe obedience and to distinguish themselves in it, not only in matters of *obligation* but also in the others, even though nothing else is perceived except the indication of the superior's will without an expressed command [...] Consequently, in all the things into which obedience can with charity be extended, we should be ready

¹⁴³ P. LECRIVAIN, "Constitutions, A Pathway to God," *Constitutions Supplement*, 2 (June 1994), p. 2, col. 3, (a series to assist Jesuits prepare for the Thirty-Fourth General Congregation, January to March of 1995), Rome, Jesuit curia.

¹⁴⁴ DE ALDAMA, *Cons.*, p. 269; cf. O'MALLEY, *The First Jesuits*, p. 354.

¹⁴⁵ *MonLain.*, IV, pp. 649-650, quoted in O'MALLEY, *The First Jesuits*, p. 339.

to receive its command [...] by applying all our energies with very special care to the *virtue* of obedience [...] [547].¹⁴⁶

The image of Christ acting through the superior influences the field of the vow's extension, extended here into the distinction made between the *obligation* and the *virtue* of obedience.

As was observed, obedience, in the broadest sense, refers to the accomplishment of the divine will. While there are many approaches to a definition of obedience, J. Gallen points out that the Holy See, when approving constitutions, has long understood it as follows:

By the vow of obedience the religious consecrate to God their own will and oblige themselves from the virtue of religion to obey the commands of their lawful superiors in everything that directly or indirectly concerns the observance of the vows, the rule, and the constitutions.¹⁴⁷

As É. Jombart rightly said ten years earlier:

The spiritual masters greatly praise the excellence of both the virtue and the vow of obedience: the virtue preserves us from many dangers and illusions, provides multiple occasions to practice the other virtues, and leads us to know the divine will at each instant; the vow completes the offering by leading us to sacrifice in the fires of charity, in addition to temporal goods, and the most legitimate affections, that which we hold most dearly, our free will and our own personal ideas. This is not the place to insist on these ascetical considerations, which can be found better developed in many spiritual works. We must consider the obedience of religious before anything else from the canonical point of view.¹⁴⁸

A distinction may be identified then, between the *virtue* and the *vow* of obedience, understood here as the difference between the *ascetical* and the *canonical*, or, as the constitution frames it, between obedience of *charity* and obedience of *necessity*. One may argue that to speak of one

¹⁴⁶ Emphasis mine.

¹⁴⁷ J. GALLEN, "Religious Obedience in Vatican Council II," in *R/R*, 26 (1967), p. 243.

¹⁴⁸ "Les maîtres de la vie spirituelle exaltent à l'envi l'excellence de la vertu et du vœu d'obéissance; vertu qui préserve d'une foule de dangers et d'illusions, qui procure de multiples occasions de pratiquer les autres vertus, qui nous fait à chaque instant connaître la volonté divine; vœu qui complète l'holocauste en nous faisant sacrifier dans les flammes de la charité, en plus des biens temporels et des affections les plus légitimes, ce à quoi l'homme tient le plus, sa volonté propre et ses idées personnelles. Ce n'est pas ici le lieu d'insister sur ces considérations ascétiques, qu'on trouvera plus développées dans beaucoup de livres de spiritualité. Il nous faut envisager l'obéissance des religieux avant tout sous l'angle canonique" (É. JOMBART, "Obéissance des Religieux," [= JOMBART] in *DDC*, ed. R. NAZ, Paris, Librairie Lettouzey et Ané, 1957, vol. 6, col. 1046). Trans. is my own.

aspect of the vow requires that all aspects be included or presupposed, and that the difference suggested above only pertains to a point of view.¹⁴⁹ However, it must be clear that obedience of necessity refers to matters of “legal” obligation, those things which the *Formula* says: “[...] ‘pertain to the Institute of the Society,’ that is, everything which the superior orders ‘according to the rule’ (*secundum regulam*).”¹⁵⁰ An added proviso, of course, is that obedience does not extend to matters in which some sin is judged to be present.¹⁵¹

While it seems clear that a superior can command only that which conforms to and is required for the good observation of the rule, and may not command someone to sin, not all circumstances allow for decisions which are so manifestly evident. For such occasions other general principles exist which also place some limitations on the interpretation of the vow of obedience. In a decision of 10 October 1986, the Apostolic Signatura said this:

Obedience, however, is not absolute and indeterminate but is circumscribed by certain limits.

Beyond those matters which may be contrary to the moral law and which therefore cannot be prescribed (ordered) by superiors and, if prescribed, have no force, limits to obedience are found in the constitutions themselves: religious obedience depends on what is given to superiors by the constitutions.

‘It is said—as St. Thomas wrote—that religious profess obedience insofar as is stated by the rule, according to which they are placed under their superiors; and they are likewise held to obey only according to those matters which pertain to what the rule states and this is obedience sufficient for salvation. If, however, they want to obey in other matters, this will pertain to higher perfection, nevertheless, the latter cannot be against God or against the professed rule, because such obedience would be illicit.’

Religious therefore can be held to a strict obligation in those matters which are according to the constitutions or at least implicitly and indirectly

¹⁴⁹ Most contemporary authors, when they do address canonical questions, tend to draw from sources which are spiritual, psychological, historical or theological, without indicating how their data relates to their canonical methodology. Thus, for instance, one might focus on a theological understanding of obedience as it developed through history, or a spiritual understanding, within which is to be found the discussion concerning not only the virtue of obedience but also the bulk of contributions to the topic which might be designated the *psychological* interpretation of the spiritual understanding of obedience. While the areas clearly overlap, this strategy lacks the rigour necessary to an interdisciplinary approach and produces at best a very blurred result. The primary concern here is a *juridical* understanding of obedience.

¹⁵⁰ DE ALDAMA, *Cons.*, p. 220.

¹⁵¹ See *Cons.*, [547, 549 and 284].

contained in them or which can be referred to them as means to an end but not in those matters which may be *supra* (above), *contra* (against) *infra* (below) the law.¹⁵²

It would be well to explore some of these notions brought forward by the Apostolic Signatura.¹⁵³

In general, a superior cannot command *over* and *above* the rule or the law, such as an heroic act, etc., but there is room for such a command if it is necessary to uphold the divine law or to render indispensable service to one's neighbour.¹⁵⁴ In this context one is reminded that a Jesuit can be commanded to evangelize pagans in another part of the world, and after final vows, even without provisions for the journey, but this is provided for in the Society's *Constitutions*.¹⁵⁵

Nor can a superior command something which is prohibited by the rule, or *against* the rule, unless it is a matter over which the superior has the power to dispense.¹⁵⁶ A case in point is the simple vow taken by professed members of the Society not to accept ecclesiastical dignities. In a letter to major superiors, 28 October 1987, P. H. Kolvenbach, the superior general, clarified

¹⁵² "Oboedientia autem non est absoluta et indeterminata sed certis limitibus circumscibitur. Praeter ea quae contra leges morales sint et quae proinde nequeunt a Superioribus praescribi et, si praescripta, vim non habent, limites oboedientiae inueniuntur in ipsis Constitutionibus: religiosus oboedientiam promittit Superiori praecipienti secundum Constitutiones.

'Dicendum—scribit S. Thomas—quod religiosi oboedientiam profitentur quantum ad regularem conversationem, secundum quam suis praelatis subduntur; et haec est oboedientia sufficiens ad salutem. Si autem etiam in aliis oboedire voluerint, hoc pertinebit ad cumulum perfectionis; dum tamen illa non sint contra Deum, aut contra professionem regulae, quia talis oboedientia esset illicita' (S.Th. II-II, p.104, a.5, ad 3.)

Religiosi ergo strictam obligationem exigere valent in iis quae sunt secundum Constitutiones vel saltem implicite et indirecte in eis continentur vel ad eas reducuntur ut media ad finem, non in iis quae sint *Supra*, *Contra*, *Infra* Constitutiones. (WERNZ-VIDAL, *Ius Canonicum*, Romae, 1933, III, p. 368)," (APOSTOLIC SIGNATURA, 10 October 1986, in *Mon. Eccl.*, 1987, pp. 273-281).

¹⁵³ To assist this undertaking the excellent summary found in JOMBART will be used. It should be noted that his article was written after the *CIC 17* but before the *CIC 83*, and so serves to assist one to see the back-drop of the present law, as well as aspects of the tradition which concern this topic.

¹⁵⁴ "Au-dessus de la règle," (JOMBART, col. 1050).

¹⁵⁵ See *Cons.*, [609].

¹⁵⁶ "Contre la règle," JOMBART, col. 1050.

some matters relating to a request that a Jesuit accept an office which carries with it the exercise of ecclesiastical power in the external forum, a matter which would fall within the ambit of the vow. The pope granted to the superior general the faculty to dispense "[...] from the simple vow by which the professed of the Society are bound not to accept any [such] office [...]" (excluding promotion to the episcopacy).¹⁵⁷ The superior general indicated in the letter communicating this information that he would proceed in a similar way with regard to Jesuits who are not professed. There are two salient points here. The first is that even those who do *not* have the specific vow not to accept ecclesiastical dignities need the general's express permission to accept such an office. This is due to the content of the *Constitutions* on the issue and the promise, or contract, which all non-professed make at the time of their simple, perpetual vows, to live according to the *Constitutions*. The second is that the letter does not indicate that the general has softened the Society's position regarding the matter, in fact he limits the granting of the dispensation to particular cases, for the greater service of the Church, at the request of a bishop, and with previous information provided by the provincial superior. In view of the *Constitutions* and the general's restrictive interpretation as indicated in his letter, this is not a matter which may be commanded, but which, in specific circumstances, may be granted.¹⁵⁸

¹⁵⁷ See the text of the vow and the letter of Kolvenbach of 28 October 1987 in Appendix X.

¹⁵⁸ The question emerges, how is it that a Jesuit who has taken a simple, perpetual vow not to accept ecclesiastical dignities becomes a bishop? If, as the tradition indicates, one cannot be commanded to do something forbidden by the *rule*, then Jesuits should not become bishops. Some have held, however, that the vow to avoid dignities is a simple vow and in the context of the Society a minor vow, whereas the vow of obedience to the pope is a solemn, and hence, a major vow. The pope can, therefore, command one under the rubric of "obedience to the pope with regard to missions," to accept this mission for greater service in the Church, namely, to become a bishop. Such an interpretation would seem to be at least a compromise, if not a corruption, of the intention of the *Constitutions*. The relevant canons in the *CIC 83*, would seem to be: c. 219 which states that no one may be coerced to accept a state of life, and a strong argument may be made that the episcopacy is a state of life; c. 1026 which states that it is absolutely wrong to compel anyone, in any way or for any reason whatsoever, to receive orders; in light of c. 578, which protects the entire patrimony of an institute, the intentions of the founders, and all that has been approved by competent authority regarding the purpose, spirit, character and sound traditions of the institute, an argument could be proposed to consider *CIC 17*, c. 2352 (now in *CIC 83*, c. 1389), which specifically intended to prevent anyone, whatever their dignity, from compelling one to embrace the clerical state, and suggested that to do so would be an abuse of ecclesiastical power. Ignatius' intention on the matter is well documented (cf. *Cons.*, [817, 118]; *EppIgn*, 1, pp. 450-453, pp. 460-467; English in YOUNG, pp. 111-113, pp. 115-120; NADAL, *Scholía*, p. 500; O'MALLEY, *The First Jesuits*, p. 310; etc.). On the other hand, there is also another simple vow taken by the professed fathers, and accounted for in the *Constitutions*, that anticipates that if

For matters which fall *outside* the rule, the general principle is Bernard's, that a religious is held only to what he has promised.¹⁵⁹ Thus, a Benedictine cannot be ordered to violate "stability" by taking on active ministry as a missionary, nor can the care of plague victims be imposed upon a teaching institute.¹⁶⁰ A corollary to Bernard's principle may be recalled, "[...] nor can he be kept from realizing what he has vowed [...]." In this context it must be mentioned that in the life of a religious community, development can occur which can give rise to new prescriptions, practices, and even obligations. Jombart holds that by the vow taken, the religious is bound to these new developments, even if they do not exist on the day of profession, as long as they are not onerous.¹⁶¹

one is to become a bishop he will hear the superior general or his delegate, so it cannot strictly be said that the matter is not provided for in the *Constitutions*. The short answer to this dilemma seems to be found by analogy in c. 1404, "Prima Sedes a nemine iudicatur." The Society has a strongly expressed intention that *as far as possible* its members will avoid being named bishops. There may exist, however, some circumstances in which the Church may be better served by their being named, but in these circumstances they would have the same obligation as any other cleric who is asked to consider accepting. If their conscience compels them to refuse, they must refuse. At any rate, this does not appear to be an issue where one may be commanded under pain of sin, and it is certainly not an area which may legitimately be commanded under the fourth vow. Cf. also "Selection of Candidates for the Episcopacy in the Latin Church" (S.C. Pub. Eccl. Neg., 25 March 1972), *AAS*, 64 p. 386, for the norms for choosing bishops, in *C.L.D.*, 7, pp. 366-373. See especially Art. I, 3, p. 368, wherein, for the case of a religious who might be named for the territory confided to the religious institute, the major superior of the institute has the faculty to propose names of possible candidates. The same consideration might be contemplated for an institute with an express vow not to accept such dignities.

¹⁵⁹ "En dehors de la règle," JOMBART, col. 1050.

¹⁶⁰ It may be pointed out that c. 680, which encourages "organized cooperation" among institutes and between them and secular clergy, was explicitly added to the Code. Also, CD, 35 encourages superiors to be open to accepting parishes. The *CIC* 83, canon 678, says: "§1 Religious are subject to the authority of bishops, whom they are obliged to follow with devoted humility and respect, in those matters which involve the care of souls, the public exercise of divine worship and other works of the apostolate. §2 In exercising an external apostolate, religious are also subject to their own superiors and must remain faithful to the discipline of the institute, which obligation bishops themselves should not fail to insist upon in cases which warrant it. §3 In organizing the works of the apostolate of religious, it is necessary that diocesan bishops and religious superiors proceed after consultation with each other."

Thus, a bishop's authority and concern is understood pastorally rather than under a vow of obedience. It should be noted that certain penal prescriptions may also apply. A general principal is that where one is bound to obey a law one is also bound to the penalties associated with it. With regard to some of the powers of bishops cf. the following: *CIC* 17: cc. 612, 619, 630-631, 296; and in *CIC* 83: cc. 297, 375, 392-394, 515 §1, 517 §2, 519, 528-530; in relation to religious, see cc. 586, 677 §1, 679-683, 738, 758, 772, 801, 806-812, 832, 837, 1301. Cf. also: LG 45, SC 26, CD 35, MR 43, 53 & 59, and ES I, 25-26. Obviously, conflict situations are subject to some interpretation and, of course, there is always the right to appeal. In the course of the Society's history this has often been a sensitive area from both the bishops' and the Society's points of view, owing to the extensive indulgences and exemptions bestowed on the Society. Vatican II helped to alleviate much residual tension and restore a balance.

¹⁶¹ In a decision of the Apostolic Signatura, 12 May 1979, the petitioner insisted that harm was caused to him by

Many authors regard “blind obedience” as falling *under* the rule. Jombart gives such examples as “watering a dry stick” or “planting cabbages with their roots in the air,” and he seriously doubts that such things can be commanded, despite its practice by certain desert fathers as an aid to humility. He suggests that such exercises are “childish techniques” and run the danger of discrediting the vow or not having it taken seriously.¹⁶²

As a general principle, the Church recommends that superiors (especially local superiors) should use obedience only rarely and for truly grave causes. Constitutions may prescribe the formula or method necessary to invoke the vow but in general it should be issued in writing and with witnesses.¹⁶³ When speaking of the authority of the superior general over the Society, the *Constitutions* read:

To speak in general, he may command in virtue of obedience all the members in regard to everything conducive to the end which the Society seeks, the perfection and aid of its fellowmen unto glory to God. And although he communicates his authority to other superiors or visitors or commissioners, he may approve or revoke what they did and regulate everything according to what seems good to him [...] [765].¹⁶⁴

a legislative act of the institute, which did not respect the “quasi pactum” between himself and the institute established by his profession. The issue concerned new norms for the convocation and procedures of the institute’s chapters, which were undertaken *ad experimentum*. He claimed that the chapter, or part of the chapter was invalid. The Signatura responded that care must be taken by the competent authority to understand the constitutions so that the spirit and purposes of the founders are faithfully recognized and observed; but, in this case, by the vow of obedience expressed at his profession, the member religiously submitted his will to the legitimate superiors of the institute and to their legitimate prescriptions. The judgement was that here there was not a violation of law, but an innovation or change of the norms. “Instat praeterea Recurrens ex huiusmodi actu legislativo sibi met damnum inferri, quatenus, mutatis Constitutionibus, illud non servatur quasi pactum a se cum Instituto initum in professione emittenda. Quamvis in hac instantia aliquid verius inesse videatur (et ideo cauta esse debet Auctoritas competens in recognoscendis Constitutionibus, adeo ut fideliter agnoscantur et servantur Fundatorum spiritus propriaeque proposita, necnon sanae traditiones, ut Concilium praescribit [in Decr. *Perfectae caritatis*, 2b]; attamen, in professione facienda, illud emittitur votum obedientiae, quo Sodalis suam voluntatem legitimis superioribus eorumque legitimis praescriptionibus religiose subdit. Decernere utrum in hac causa, legitima Auctoritas in exercenda sua potestate legislativa semper legitime egerit, non pertinet, uti diximus, ad Nostrum Supremum Tribunal” (*Comm. pro Religiosis*, (1979), pp. 265–166).

¹⁶² “En dessous de la règle,” (JOMBART, cols. 1050–1051). Blind obedience shall be addressed presently.

¹⁶³ See *CIC* 83, cc. 37, 55, 474, 1437, etc.

¹⁶⁴ “[...] apart from the express vow which the Society has with respect to the currently reigning Sovereign Pontiff, and apart from the other three essential vows of poverty, chastity, and obedience, no *constitutions, declarations, or regime of living* can oblige under mortal or venial sin, unless the superior orders the subjects in the name of our Lord Jesus

Jombart indicates clearly that “not to obey an order given in virtue of the vow would be to sin against the virtue of religion, to commit a sacrilege in the broad sense.”¹⁶⁵ But he distinguishes between a sin, when the vow is involved, and a moral fault, when the vow is not in question; also, between the simple fact of disobedience and the more serious obstinate refusal to obey which may be likened to a formal attack on authority.

If a doubt arises as to whether the superior has the power to issue a particular command, the presumption is in favour of the superior, who must be careful not to exaggerate the breadth of his powers. However, if the matter commanded is probably but not certainly sinful, the religious is not held in conscience to execute the act. If a religious judges that the command of a superior is inopportune, ill-advised, impractical, or very difficult to observe for mediocre returns, he may, after prayer, make a *representation* to the superior, i.e., ask that the matter be reconsidered. In more serious matters there is also the possibility of recourse, generally first to a higher superior, but also to the competent congregation, then to the Apostolic Signatura, and, as is every Christian’s right, at any time to the pope.¹⁶⁶

Christ or in virtue of obedience [...]” (*Cons.*, [602]).

¹⁶⁵ “Ne pas obéir à un ordre donné en vertu du vœu serait pécher contre la vertu de religion, commettre un sacrilège au sens large” (JOMBART, col. 1051). Frequently in literature, including the *Constitutions* of the Society, one finds the phrase, “one who has the power to command under pain of sin.” Already the phrase “vow to the Sovereign Pontiff” involves an ellipsis, in that the vow is a promise which is made to God to obey the pope. (See GANSS, *Cons.*, pp. 79–80, note 17). Notice that the reference is to one who has the *power* to command under pain of sin, and that there is no mention that the command is actually given under pain of sin (if, indeed, one could contemplate anyone giving such a command).

¹⁶⁶ See Abbo and Hannan, p.508, and the commentary on *CIC 17* cc. 251, on pp. 307–309. Here it is indicated that the Congregation, instituted by Pius X (1908), following the Sacred Congregation for Regulars, founded by Sixtus V (1588), subsequently united to the S.C. of Bishops (1601) forming then the S.C. for Bishops and Regulars, is “[...] exclusively competent in matters affecting the government, the discipline, the studies, the property, and the privileges of the religious of the Latin Rite [...] those of both solemn and simple vows [...]” The competence extends to controversies between religious and non-religious, to granting to religious all dispensations from the common law, except regarding the communion fast (later granted to it), to receive and decide questions of recourse affecting rights or interests of institutes or their members, etc. See PB for the competencies of Congregations. See the *CIC 83*, cc. 1417, 700, 691, 679, etc.

B. The Manner of Observing Obedience:

The most original and characteristic contribution to the development of obedience, generally attributed to Ignatius, is to be seen in what has come to be called his three degrees of perfection:

Therefore we should be ready to leave unfinished any letter or anything else of ours which has been begun and to apply our whole mind and all the energy we have in the Lord of all, that our obedience may be perfect in every detail, in regard to the *execution*, the *willing*, and the *understanding* [...].¹⁶⁷

The following *declaration* clarifies the intention of Ignatius on this matter:

The command of obedience is fulfilled in regard to the execution when the thing commanded is done; in regard to the willing when the one who obeys wills the same thing as the one who commands; in regard to the understanding when he forms the same judgement as the one commanding and regards what he is commanded as good. And that obedience is imperfect in which there does not exist, in addition to the execution, also that agreement in willing and judging between him who commands and him who obeys [550].

This *declaration* requires some explanation. G. Ganss, in his reflection upon it says:

The very core of Ignatius' concept of an act of obedience with its three degrees of perfection is succinctly expressed in [550]. *Execution of the command is the basic essential, the matter comprised by the vow.* But if a subject's act of obedience is to be raised to higher degrees of value and become perfect, he must make it more effective and valuable by a lively concurrence of his own desire, which he conforms to that of the superior's command and to give him the benefit of possible doubts, at least until reflection or dialogue, in a genuine and prayerful spirit of indifference, reveals something which he ought to represent to the superior ([543, 610, 627]). The subject ought also to recognize the superior's right to the final decision ([810]).¹⁶⁸

¹⁶⁷ Emphasis mine. Cf. DE ALDAMA, *Cons.*, p. 221. One may compare this to *Cons.*, [284], where the same elements of obedience are presented to those in formation.

¹⁶⁸ GANSS, *Cons.*, p. 249, note 9, emphasis mine. GANSS points out that: "In his Letter on Obedience of 1553, Ignatius explains obedience of execution in no 5; of the will in 6-8; of the judgement in 14; means to achieve it, in 15-18; representation in 19 (*EppIgn*, IV, pp. 669-681; English in *Perfect Obedience*, pp. 20-30)" (*ibid.*). "Representation" will be treated presently.

The higher degrees of value referred to by Ganss, are the ascetical values such as the growth in humility to be advanced through the abnegation of one's will, a notion first raised at the *Deliberations*, then given such prominence in the *Formula*.

1. Blind obedience:

At first glance the above directive may seem somewhat restrictive and unbalanced, principally with regards to the power given to the superior over the subject. This is especially true when combined with three celebrated images at the end of the first constitution, [547], which have been a consistent source of exaggerations and misunderstandings, "[...] often quoted as the 'special' and even 'sole' norm of Ignatian obedience [...]":¹⁶⁹

We should perform with great alacrity, spiritual joy and perseverance whatever has been commanded to us, persuading ourself that everything is just and renouncing with blind obedience any contrary opinion and judgement of our own in all things which the superior commands [...] We ought to be firmly convinced that everyone of those who live under obedience ought to allow himself to be carried and directed by Divine Providence through the agency of the superior as if he were a lifeless body which allows itself to be carried to any place and to be treated in any manner desired, or as if he were an old man's staff which serves in any place and in any manner whatsoever in which the holder wishes to use it [547].

In fact, Ignatius is not the first to use the image of "the lifeless body"; it is brought forward from the writings of both Sts. Nilus and Francis of Assisi,¹⁷⁰ and here they are "[...] added as second thoughts (in the second composition [of the *Constitutions*]) to illustrate the doctrine set fourth in the previous paragraphs; and we know that every comparison limps."¹⁷¹ It should be clear that Ignatius is not interested in the obedience of apostolic robots nor of unthinking

¹⁶⁹ DE ALDAMA, *Cons.*, p. 223.

¹⁷⁰ "See St NILUS, *De monastica exercitatione*, Chapter 47 (PG 79, p. 771); St. BONAVENTURE, *Legenda maior*, Chapter 8" (DE ALDAMA, *Cons.*, p. 224, note 31).

¹⁷¹ DE ALDAMA, *Cons.*, p. 223.

missionary machines. Obedience of the will and of the judgement would not be possible in such circumstances. "The only intention here is to stress the indifference and availability of the truly obedient person [...]." ¹⁷² As is so well said by J. Futrell:

'Blind' obedience is presented as the means to achieve obedience of the understanding in cases where the companion has an opinion or judgement contrary to the order of the superior. It would not be operative, therefore, when one sees clearly that the command of the superior is wise, because in such cases obedience of the understanding is immediately possible. 'Blind' obedience consists in persuading oneself that the superior's order is good, even though it contradicts one's own judgement and requires denial of one's own opinion. [...] 'Blind' obedience means, then, not the shutting of one's eyes as such, but rather fixing one's attention uniquely upon the *quid agendum*: the fact that within the 'scope of our vocation' the will of God is being indicated by the superior, although one does not know, anymore than did Ignatius at Jerusalem, whither it is leading. ¹⁷³

What Ignatius desired, and even expected, of the subject was the following:

[...] (1) the fundamental desire to learn and carry out God's will; (2) genuine religious indifference or impartiality in regard to what is commanded; (3) a willingness, as a guard against self-deception, to give the superior the benefit of possible doubts about the prudence of the command, at least until cogent reasons against it were examined, usually in dialogue; (4) recognition of the superior's right to make the final decision (see [810]); and finally, (5) cheerful, wholehearted execution. ¹⁷⁴

One must also not lose sight of the chief intention of obedience, identified at the *Deliberations*:

"[...] (1) to fulfil the will of God (understood always 'according to the scope of our vocation'

¹⁷² DE ALDAMA, *Missioning*, p. 223.

¹⁷³ FUTRELL, pp. 169-170. GANSS says this: "The idea of 'blind obedience' is at least as old as the *Constitutiones monachorum*, long attributed to St. Basil (see PG 13, 1409). Its meaning here in [547], its only occurrence in the *Constitutions*, has been much debated (see the references in Espinosa Pólit, pp. 148-161). Blind obedience surely entails a willingness to obey cheerfully and a propensity to presume that the superior's order is right and prudent until some cogent reason to the contrary has become manifest [...] If Ignatius' metaphor should be pressed too far, he could be taken to mean that the subject should abdicate his judgement, responsibility and initiative—something which no man may do and which is incompatible with the dignity of the human person. But such an interpretation falsifies Ignatius. His own texts and example reveal that the 'blindness' was not total. The subject was expected to keep his eyes sufficiently open to see that there was no sin [549], and whether there were factors which should be represented to the superior (see [92, 131, 543, 627] [...])" (id., *Cons.*, p. 248, note 7).

¹⁷⁴ GANSS, *Cons.*, p. 248, note 7. GANSS points out that much the same procedure has been commended anew by the Vatican Council II in its Decree on the Renewal of Religious Life, PC no. 14, and by the Thirty-First General Congregation in the "Decree on Obedience," nos. 6-8.

of aiding souls); (2) more effectively to preserve the Company for the achievement of its apostolic end; (3) to provide for all spiritual and temporal contingencies of the companions united in this apostolic Company."¹⁷⁵

To exercise his role of discernment the superior must use every possible human means to gather evidence in order to form a correct judgement of the actual situation. Ignatius, who always sought clarity in discerning the concrete will of God, knew that this could be attained only through intimate knowledge of the concrete circumstances of persons, times and places. Otherwise, mistaken decisions would be made which would result in actions not ordered to the end of the Company. [...] Ignatius insists repeatedly upon the absolute necessity of this knowledge as a means of discernment, and he sought to provide efficacious means to attain it.¹⁷⁶

Ignatius recognized, and even presumed, that each member of the Society was under the influence of the Holy Spirit, and that it would be well to use their ideas and advice to better understand God's will. To aid in this, he built into the structure of the Society several levels of communication, or dialogue in obedience, some more and some less formal: the manifestation of conscience; representation; general confession,¹⁷⁷ especially for those about to be admitted to the Society; broad consultations,¹⁷⁸ with experts when necessary, as with the companions; spiritual conversations, earlier identified as a primary apostolate of the Society, but no less important among the companions themselves;¹⁷⁹ visitations;¹⁸⁰ and regular letter writing.¹⁸¹

¹⁷⁵ FUTRELL, p. 17.

¹⁷⁶ FUTRELL, p. 131.

¹⁷⁷ See *Cons.*, [65, 93, 95, 98, 200, 277, 551, etc.].

¹⁷⁸ The *Constitutions* mandate that consultations should be frequent and thorough. While the universal law defines some areas where the superior must have the consent of the council to act validly, Ignatius almost always protected the superior's ability to make the final determination. In the words of Ignatius: "The superior, according to his greater or lesser doubts about the matters over which he has authority, ought to have greater or lesser recourse to those who are his brothers or sons in the Lord—the more difficulty he experiences, the more he ought to consult and discuss with other persons or with all those who live together in the house, as the matter becomes more involved" (O'MALLEY, *The First Jesuits*, p. 355, and his note 152, p. 446). For examples of the use of consultation in the *Constitutions* see [667, 803, 804, 810, 811, 490, 502, 211, 221, 501].

¹⁷⁹ See *Cons.*, [115, 349, 648, 408, 89, 437, 729, 814].

All of these methods are consequential, but two deserve special attention because of their significance to this topic: manifestation of conscience and representation.

2. Manifestation of Conscience

In the *Constitutions*, Ignatius presents the substance of his understanding of manifestation of conscience in the following passages:

Through reflection in our Lord, what follows has seemed good to us in His Divine Majesty. It is a matter of great and even extraordinary importance that the superiors should have a complete understanding of the subjects, that by means of it they may be able to direct and govern them better, and while looking out for the subjects' interests guide them better into the paths of the Lord [91].

Likewise, the more completely the superiors know these subjects' interior and exterior affairs, just so much the better will they be able, with greater diligence, love and care, to help the subjects and to guard their souls from various inconveniences and dangers which might occur later on. Further still, in conformity with our profession and manner of proceeding, we should always be ready to travel about in various regions of the world, on all occasions when the Supreme Pontiff or our immediate superior orders us. To proceed without error in such missions, or in sending some persons and not others, or some for one task and others for different ones, it is not only highly but even supremely important for the superior to have complete knowledge of the inclinations and motions of those who are in his charge, and to what defects or sins they have been or are more moved and inclined; that thus he may direct them better, without placing them beyond the measure of their capacity in dangers or labors greater than they could in our Lord endure with a spirit of love; and also that the superior, while keeping to himself what he learns in secret, may be better able to organize and arrange what is expedient for the whole body of the Society [92].

Ignatius seemed to understand that this approach to manifestation was innovative,¹⁸² since before writing it into the *Constitutions*, he probed the matter with the Dominican theologian, E. Foscarari, Master of the Sacred Palace, and later Bishop of Modena, who told him "[...] that the concept seemed to be based on revered sources and Gospel teaching, and, as such, was worthy

¹⁸⁰ See *Cons.*, [668-670].

¹⁸¹ See *Cons.*, [673-676].

¹⁸² DE ALDAMA, *Cons.*, p. 58.

of being observed.”¹⁸³ This style of internal forum government, with this understanding and practice of manifestation as its heart, was so strongly held in the early Society, that the Fifth General Congregation defined it as one of the “essential elements of the the institute.”¹⁸⁴ But more important to us is the stated link between manifestation and the apostolic undertaking of the Society, and specifically to the matter of missions from the pope.

According to A. de Aldama, Ignatius presents in hierarchical order his reasons for the manifestation. Superiors are to know their subjects firstly to direct, govern and guide them, and only secondly to help guard their souls from danger. The substance of the change he initiated and some difficulties it later caused is summarized by Ganss:

Manifestar su conciencia: manifestation of the interior state of one’s soul was a common practice in religious life from the time of St. Anthony (d. 356). Until approximately 1000 it was used solely for the spiritual progress of the individual. St. Bonaventure (1221–1274) approved superiors’ use of the resulting knowledge to adjust religious observances to the subject’s capacities. St. Ignatius notably expanded this use of the manifestation as an instrument to further his subjects’ spiritual welfare, the government of the Society, and its apostolic works. His example was followed widely in other religious institutes both clerical and lay, many of which imposed the manifestation by rule. In some instances, especially of lay superiors, abuses arose which infringed upon either liberty of conscience or jurisdiction of confessors. Hence Leo XIII in 1890 forbade obligatory or elicited manifestation in lay religious institutes. In the Code of Canon Law (1918 [sic 1917]), c. 530, §1 forbids superiors to induce or oblige manifestation, but §2 encourages subjects to filial openness with their superiors, even in regard to matters of conscience if the superiors are priests. On 29 June

¹⁸³ *ConsMHJS*, 1, pp. 342–346. See DE ALDAMA, *Cons.*, p. 58, note 74.

¹⁸⁴ *Greater Moment*, p. 208, D. 58. This followed on a history wherein the First General Congregation declared that the “substantials” of the *Constitutions* as written by Ignatius could not be changed even by a General Congregation (*ibid.*, p. 76, D. 15, 16). The Third General Congregation strengthened this prohibition (*ibid.*, p. 143, D. 23), and the Fourth actually considered adding a simple vow for the professed not to do anything privately or publicly to change the essentials of the institute or the *Constitutions*. Instead it was decided that Provincial Congregations could not discuss such changes (*ibid.*, pp. 174–175, D. 26). FUTRELL questions whether such a Congregation had the authority to bind future Congregations, and points out that the notion “[...] would seem to have been contrary to both the letter and the spirit of Ignatius’ legislation, which always envisioned necessary changes according to contingent circumstance; in everything except the ‘scope of our vocation’ ” (*id.* p. 154, note 102).

1923, Pius XI renewed approval of what St. Ignatius' *Constitutions* contain on this topic.¹⁸⁵

There is no aspect of government in the Society which more clearly distinguishes the particularly Ignatian approach and spirit of obedience.

The *Constitutions*, [93], says that the manifestation will take place "[...] in confession or in secret or in another manner which may be more pleasing or spiritually consoling [...]." The question may be asked how it is that the superior may use in the external forum, i.e., for the government of the Society, information which is gained through the internal forum, especially if the matter is under the seal of confession? De Aldama suggests that in Ignatius' day the confessional seal was not understood so strictly as it is today. "It always excluded the revelation of anything heard in confession, but not the possibility of using the information."¹⁸⁶ It is also pointed out that Ignatius' Spanish *en secreto*, does not necessarily mean "under secrecy." "*En*

¹⁸⁵ "On the history of the manifestation cf. D. DEE in *NCatEnc*, vol. 9, pp. 160-162; J. CREUSEN, trans., ELLIS, KORTI, *Religious Men and Women in the Code* (Milwaukee, Bruce, 1965), nos. 128-132; F. N. KORTI, *The Evolution of 'Manifestation of Conscience' in Religious Rules, III-XVI Centuries*, (Rome, 1949)" (GANSS, *Cons.*, pp. 104-105, note 19.) Accounts of the two audiences of W. Ledóchowski, superior general, with Pius XI to discuss the matter are found in *ARSI*, new Society, *S. Sedes*, 4-9; and the pontifical approbation in *Statuta CG XXVII*, p. 261 (see DE ALDAMA, *Cons.*, p. 60, note 79). The issue is more complex than it first appears, for it is linked to the understanding of the "jurisdiction" of a religious superior. JOMBART, col. 1049, says that jurisdiction exists in juridically perfect societies (the Church, a sovereign state) and is thus a public power designated for the common good. The superiors who have at least ordinary executive power in clerical institutes of pontifical right and of clerical societies of apostolic life of pontifical right (*CIC 83*, c. 134 §1) participate in ecclesiastical jurisdiction not only in the internal forum, but, as defined by the constitutions and the common law in c. 596 §2, in the external forum as well. The *CIC 17* referred to these powers (especially in c. 501) and later the Code Commission applied them to dominative power, by analogy to cc. 197, 199, and 206-209. The *CIC 83* does use the term, especially in c. 129 §1, however the term "ecclesiastical power of governance," is also seen, no doubt to shift the ground in what has become a complex and difficult theory, which requires a clearer articulation. "Since the power referred to in §1 of Can 596 [*CIC 83*] is not, in the canonical sense, true power of governance or jurisdiction, the canons of Book I, Tit. VIII did not apply. However, from the early days of the 1917 Code many canonists applied, by analogy of law (c. 20 of 1917; c. 19 of 1983), certain of the norms also to what was then called 'dominative power' and this was confirmed by an authentic declaration PCCJ of 26 March 1952, (in *AAS*, 44 [1952], p. 496), which decided that the following canons of the 1917 Code were applicable also to the power of religious superiors: Cc. 197, 199, 206-209, unless the nature of the matter or the text or context of the law prevent such application" (M. O'REILLY, *Norms on Consecrated Life*, class notes for private use, Saint Paul University, Ottawa, 1989-1990, p. 219. Used with permission).

¹⁸⁶ DE ALDAMA, *Cons.*, pp. 60-61. DE ALDAMA cites A. DE LIGUORI, *Theologia Moralis*, III, pp. 677-678, where he presents the views of Sts. Thomas and Bonaventure on the matter; however, a more clear example may be seen in the case of the Inquisitor, whose determination of absolution or condemnation of the one under investigation was based on the "confession."

secreto has another accepted meaning in Spanish, which is perhaps more common: 'in private,' that is, in personal conversation with the superior, not in public. That seems to have been the way that Laínez understood it."¹⁸⁷ In an attempt to limit possible abuses, especially when the manifestation of conscience is potentially linked with the sacrament of confession, it must be received by a priest.¹⁸⁸

The tone and balance of this relationship between superior and subject is captured by the Thirty-First General Congregation:

The communication between the superior and his brothers should be as far as possible, plain and open. The superior should endeavor to make his mind clearly known to his confreres and understood by them; and he should take care that they, according to the nature and importance of the matter and as their own talents and duties require, share more fully in his knowledge and concern both for the personal and community life of Jesuits and for their apostolic labours. The religious, for his part, should try to make himself known, with his gifts and limitations, his desires, difficulties, and ideals, through a continuing, confiding, familiar, and candid colloquy, about which the superior is held to strict secrecy. In this way an account of conscience is obtained which is sincere and open in form, and not reduced to a formal, periodic inquiry about actions already performed.¹⁸⁹

The same document points out that as far as possible the principle of subsidiarity should be observed, trusting the one on the mission, and leaving him suitable freedom "in the Lord" to make the best judgement as to how to proceed.¹⁹⁰

¹⁸⁷ DE ALDAMA, *Cons.*, p. 60. The substance of *CIC 17*, c. 530 §1 is found in the *CIC 83* in c. 630 §5, which states: "Members are to approach superiors with trust, to whom they can express their minds freely and willingly. However, superiors are forbidden to induce their subjects in any way to make a manifestation of conscience to them."

¹⁸⁸ Canon 630 §1 states: "Superiors are to recognize the due freedom of their members concerning the sacrament of penance and the direction of conscience, with due regard however for the discipline of the institute;" and §4 states: "Superiors are not to hear the confessions of their subjects unless (*nisi*) the latter request it of their own initiative." The Thirty-Fourth General Congregation of the Society, completed in March 1995, addressed this matter. While it protected the manifestation of conscience as an essential aspect of the governance of the institute, it recognized the evolution of law and the practice of the Church, and in the revision of the *General Examen* [93], prescribed that manifestation should not be placed under the sacramental seal. Likewise in the revision of [98], which speaks of general confessions, it added the words: "to a priest whom the superior appoints for him."

¹⁸⁹ GC 31, D. 17, no. 8; *Cons.*, [551].

¹⁹⁰ GC 31, D. 17, no. 6; *Cons.*, [667; see also 221]; *Determinaciones antiguas*, no. 45, in *ConsMHSJ*, 1,

3. Representation.

Most commentators depict representation as a right, indeed an obligation, of the subject which palliates the austere and even cold rigor of obedient submission. Ignatius viewed it as an important, in fact essential, component of the discernment process, perhaps best described as a natural extension of the ongoing manifestation between superior and subject. At times it could occur as a particular form of consultation, at others as a correction to a difficulty. The following passages are representative of its presentation in the *Constitutions*.

However, when something occurs constantly to these candidates as being conducive to greater glory to God our Lord, they may, after prayer, propose the matter simply to the superior and leave it entirely to his judgement, without seeking anything more thereafter [131].

[...] The aim is that both sides may be content and satisfied while proceeding with greater clarity in everything, while all things are being directed and ordered toward greater service and praise of God our Lord [133].

Even though the subject who represents his need ought not personally to argue or urge the matter, nevertheless if the superior has not yet understood it, and if he requests further explanation, the subject will give it. If by chance he forgets to provide after he has indicated his intention to do so, it is not out of order to recall it to his memory or to represent it with becoming modesty [293].

For someone to propose the motions or thoughts which occur to him contrary to an order received, meanwhile submitting his entire judgement and will to the judgement and will of his superior who is in the place of Christ, is not against this prescription [627].

In the above passages one may see that a representation can be initiated by either the subject or the superior, before or after a decision has been taken, that prayer permeates the procedure, and that Ignatius always protected the right of the superior to make the final decision. Circumstances where the superior or the subject are not entirely satisfied are those times which may call for blind obedience, as mentioned above, or for further prayer and testing of the inclinations or

notions.¹⁹¹ Although one is directed not to seek anything more after a representation has been made, a later *declaration*, [293], allows for the possibility of opening the subject again, if the superior requests it. Later again, in a letter composed in 1555, Ignatius allows for the subject to re-present a manifestation, several times if necessary, “for time and experience uncover many things, and the superior himself may change his mind.”¹⁹²

While the *Constitutions* are normative for the interpretation of obedience, some correspondence of Ignatius demonstrates how he understood representation. J. Futrell uses the 1536 letter to G. P. Carafa¹⁹³ to identify a clear motive and three steps in the essential structure of representation:

¹⁹¹ In the *SpEx.*, [334], there is a rule for the discernment of spirits: “When the enemy of human nature has been perceived and recognized by his serpent’s tail and the evil end to which he is leading, it then becomes profitable for the person whom he has tempted in this way to examine the whole train of the good thoughts which the evil spirit brought to the soul; that is, how they began, and then how little by little the evil spirit endeavoured to bring the soul down from the sweetness and spiritual joy in which it had been, and finally brought it to his own evil intention. The purpose is that through this experience, now recognized and noted, the soul may guard itself in the future against these characteristic snares.” This kind of thinking pertains no less to formal decision making processes than to the private prayer of an individual.

¹⁹² “The Method of Dealing with Superiors,” in W. J. YOUNG, *Letters of St. Ignatius Loyola*, Chicago, Loyola Univ. Press, 1959, no. 6, p. 391. FUTRELL suggests that the late date of the letter allows us to consider this to be the mature thought of Ignatius (p. 141). It is interesting to point out here a lengthy but significant statement from the Thirty-First General Congregation: “It happens more often nowadays that a member of the Society will sincerely consider that by a dictate of conscience he is forbidden to follow the superior’s will, for he thinks that in a given case he is morally obliged to the contrary. Now it is true that no one may act against the certain dictates of his conscience. Still, conscience itself requires that in its formation attention be paid to all the factors which merit consideration in judging the morality of a decision, such as the universal good of the Church and the Society, which may be at stake, as well as the rights of others and the special obligations and values of religious life, which were freely assumed. Only a consideration of the whole reality can bring about a well-formed conscience. A member of the Society, therefore, should sincerely ponder the matter before the Lord, and present his reasons to his immediate or higher superior. It will then be the duty of the superior to weigh these reasons with an open mind, to review the case, and finally urge or withdraw the command. But if the subject cannot be induced in this way to accept with a good conscience the decision of the superior, he may request that the whole question be referred to the judgement of certain persons, even non-Jesuits, to be chosen by common consent. If after such a decision, however, no solution is reached which the Jesuit thinks he can follow without sinning, the superior, having consulted higher superiors as the case may merit, should provide for the course of action which seems more advisable in view of the individual Jesuit’s conscience. But a man who, time after time, is unable to obey with a good conscience, should take thought regarding some other path of life in which he can serve God with greater tranquility” (GC 31, D. 17, no. 105). It should be noted that provision is made here for mediation or arbitration processes, even involving non-Jesuits where necessary, in cases of conscience. It has been known that such procedures have and may be used in other cases of substance as well.

¹⁹³ Carafa was then a cardinal, and later Pope Paul IV. See the letter in Appendix III.

The motive of making the representation, which is also the norm of discernment, is the 'service of God our Lord.' The sincerity of this motive is tested in repeated prayer, which is the first step. Secondly, all the evidence of the concrete circumstances is weighed and considered—submitted to personal discernment of spirits in the light of the norm of divine service. Finally the conclusion of this discernment is presented to the superior as the sincere judgement of the subject concerning the concrete will of God, 'as I would to my own unique soul.' When he integrates the structure of representation into the life of the Company, Ignatius will add one further step. After having made his representation, the subject must accept the ultimate decision of the superior with perfect obedience. Otherwise, it will be impossible for the superior to exercise his role of unifying the wills and actions of all the members of the one body and for the Company to serve Christ through the aid of souls in companionship.¹⁹⁴

It may be surprising to some to recognize the degree to which the subject participates in the decision-making process. But when obedience is viewed as a dialogue, it is reasonable to consider that the superior can benefit, not only from other points of view, but from the subjects' personal discernment of spirits as well. The balance is protected in that, "the objective discernment of the Company or the superior controls the subjective discernment of the individual member, as it must in order to maintain the unity of the body."¹⁹⁵

Prayer is essential to each step of the process: to test the sincerity of the motive; to weigh the data; to make the decision; and, also, as is not mentioned above, to seek confirmation of the decision made.¹⁹⁶ A key to discernment in general, and especially to representation, is the disposition of indifference. In the *Exercises* Ignatius says that after putting before oneself the matter about which an election is to be made:

It is necessary to keep as my objective the end for which I am created, to praise God our Lord and save my soul. Furthermore, I ought to find myself

¹⁹⁴ FUTRELL, pp. 138–139. A well documented discussion on representation occurs in his Chapter 6, "Decisions for Apostolic Love—II: The Steps in Discernment," pp. 122–156. The Thirty-First General Congregation says the following: "Theoretical certitude or very high probability about the objective superiority of a given solution is not to be awaited before a superior can authoritatively impose it; nor are the reasons for a course of action always and everywhere to be given the subject that he may devote himself wholeheartedly to the goals and works assigned to him. For the final reason for religious obedience is the authority of the superior" (D. 12, no. 11).

¹⁹⁵ FUTRELL, p. 139.

¹⁹⁶ See FUTRELL, p. 142 ff., for an insightful presentation of the confirmation process.

indifferent, that is, without any disordered affection, to such an extent that I am not more inclined or emotionally disposed toward taking the matter proposed rather than relinquishing it, nor more toward relinquishing it rather than taking it. Instead, I should find myself in the middle, like the pointer of a balance, in order to be ready to follow that which I perceive to be more to the glory and praise of God our Lord and the salvation of my soul.¹⁹⁷

Typical, however, of Ignatius is his pragmatic, realistic approach: to pray and to use all the human means at his disposal. Accordingly, in his 1555 letter he suggests that the one making the representation, “[...] adapt his manner and moment of approaching the superior to the latter’s temperament and natural capacities. Thus, the companion should speak very clearly, and he should choose the most opportune time to make his representation.”¹⁹⁸

It is helpful to underscore that for Ignatius, obedience was first of all spiritual:

This spiritual obedience is apostolic, and serves the apostolate by uniting the members of the Society among themselves in their superior, and by enabling the superior to exercise his role as the minister of God’s will. Thus the obedience of the Society founded by Ignatius is truly linked with charity, and is clearly an apostolic expression of filial and fraternal love. Obedience, as charity, is primarily something permanent, expressed and manifested by individual acts, but in its most proper sense involving a permanent way of life.¹⁹⁹

This approach to decision-making in the Society serves to clarify several fallacies regarding religious obedience. K. Rahner calls them misconceptions, and he holds that obedience presupposes: not children, but mature adults; that it is not the mere “regulation of traffic”; its aim is not to produce merely passive subjects; and superiors are not “Olympian papas,” “[...] more intelligent, more clever persons, more morally steadfast, more provident and wise in the

¹⁹⁷ GANSS, *SpEx.*, [179], in a section entitled: “The First Method of Making a Sound and Good Election.” GANSS defines indifference: “‘Indifferent’: undetermined to one thing or option rather than another; impartial; unbiased; with decision suspended until the reasons for a wise choice are learned; still undecided. In no way does it mean unconcerned or unimportant. It implies interior freedom from disordered inclinations. It is a key technical term of Ignatian spirituality” (ibid., p. 151, note 20).

¹⁹⁸ FUTRELL, p. 141. Cf. “The Method of Dealing with Superiors,” in W. J. YOUNG, *Letters of St. Ignatius Loyola*, Chicago, Loyola Univ. Press, 1959, no. 7, p. 391.

¹⁹⁹ O’GORMAN, p. 102. For references which discuss how the connection between obedience and charity is realized see his p. 102, note 13.

ways of the world.” Neither can a subject hide behind obedience in a misguided attempt to be free from “[...] the responsible direction of his own personal initiative,” for “he himself chooses obedience; otherwise he would not be in religious life.”²⁰⁰ Rahner insists that religious obedience is not to be understood “[...] primarily as obedience to individual commands, nor is it even the abstract notion of a general readiness to fulfil such commands.”²⁰¹ He broadens the scope of obedience and says:

Obedience is the acceptance of a common mode of religious life in imitation of Christ according to a constitution, which the Church has acknowledged to be a true and practical expression of a divinely oriented existence. By virtue of this acceptance and obligation the vow explicitly or implicitly includes the carrying out of the just commands of the authority necessary in any society, when they are directed to the concrete realization of the life-form of religious commitments ‘according to the constitutions.’²⁰²

For Jesuits, this mode of religious life found its first expression when they presented themselves to the pope so that he could send them where there was the greatest need; it was clarified at the *Deliberations of the First Fathers*; it was formalized in the *Five Chapters*, the first sketch of the institute; but it came into being when they expressed vows to one of their own number, and a new religious institute was born. At each step the driving concern was evangelization, “to help souls.” This is succinctly put by the Thirty-First General Congregation:

A Jesuit, therefore, is essentially a man on a mission: a mission which he receives immediately from the Holy Father and from his own religious superiors, but ultimately from Christ himself, the one sent by the Father. It is by being sent that the Jesuit becomes a ‘companion of Jesus.’²⁰³

²⁰⁰ K. RAHNER, “A Basic Ignatian Concept: Some Reflections on Obedience” (= RAHNER, “Obedience”), in *WL*, 86 (1957), especially in his section called Various Misconceptions, pp. 292–299.

²⁰¹ RAHNER, “Obedience,” p. 302.

²⁰² RAHNER, “Obedience,” p. 304.

²⁰³ GC 31, D. 17, no. 12; Phil 2: 7–8; Vat. II, *Religious Life (PC)*, no. 14.

In the context of obedience for mission, the reasons put forward as the motivation for the fourth vow, especially the desire to safeguard the "surer direction of the Holy Spirit," interest us here as well, for they apply no less to the third vow. For Ignatius and the early companions obedience was the instrument, the agent, through which they attempted to discern and carry out the will of God.

C. Obedience *First to the Sovereign Pontiff*

All should keep their resolution firm to observe obedience and to distinguish themselves in it, not only in the matters of *obligation* but also in the *others*, even though nothing else is perceived except the indication of the superior's will without an expressed command. They should keep in view God our Creator and Lord, for whom such obedience is practiced, and they should endeavor to proceed in a spirit of love and not as men troubled by fear. Hence all of us should exert ourselves not to miss any point of *perfection* which we can with God's grace attain in the observance of all the *Constitutions* and in our manner of proceeding in our Lord, by applying all our energies with very special care to the *virtue* of obedience shown first to the Sovereign Pontiff and then to the superiors of the Society.

Consequently, in all the things into which obedience can with charity be extended, we should be ready to receive its command just as if it were coming from Christ our Saviour, since we are practicing obedience to one in His place and because of love and reverence to Him [...] [547].

It is very surprising to see in the above constitution that obedience is to be shown "[...] first to the Sovereign Pontiff and then to superiors of the Society," especially when it is recalled that this section of the *Constitutions* is not dealing with the fourth vow of the professed, but with the evangelical vow of obedience taken by all Jesuits.

[...] it is all the more strange since at that time the stipulation in canon law about religious being obliged to obey the pope as supreme superior in virtue of the vow of obedience had not been made (it came much later) [...] In any case, it is clear that everything stated about the extension of obedience, and everything mentioned later about the manner of obeying, Ignatius understood not only of obedience to the superiors of the Society but 'first' of obedience to the pope.²⁰⁴

²⁰⁴ DE ALDAMA, *Cons.*, p. 221. Cf. *CIC* 17, c. 499; *CIC* 83, c. 590 §2.

At the beginning of this part of the Chapter attention was drawn to the difference between “obedience of necessity” and “obedience of charity,” the *obligation* of obedience and the *virtue* of obedience. While pieces of this constitution have been quoted earlier, in this context it is helpful to see the entire paragraph. The wording and structure itself of the constitution indicates that it makes a distinction between the “obligation” of the vow, a matter of strict observance, and the points of perfection which may be obtained by applying care to the “virtue of obedience.” The first sentence reads that obedience should be observed: “[...] not only in the matters of obligation but also in the others [...].” What are the other matters to which the constitution refers? They are precisely the points of perfection which may be obtained by applying energies with special care, motivated by a spirit of devotion, out of love and not out of fear, “to the virtue of obedience shown first to the Sovereign Pontiff and then to the superiors of the Society.”²⁰⁵ Why would Ignatius and the companions perceive and practice evangelical obedience in this way? To understand the mind of the legislator on this matter one must consider from the context, elements which relate to the purpose and circumstances of the law.

During the Lent of 1539, at the *Deliberations*, several decisions were made which served to bring to fulfillment the intention of the vows made earlier at Montmartre.²⁰⁶ The most important of these was that anyone joining the Society would profess a “vow of obedience to the pope, offering to go any place the pope may wish to send him, be it among the faithful or among infidels, according to his capacity for helping the neighbour.”²⁰⁷ One important motivation for

²⁰⁵ Since the promulgation of *CIC 83*, c. 590 §2, it is somewhat of a moot point to consider the juridical implications for strict observance contained within this commitment to obey first the pope. But even so, the context and the wording of the constitution indicate that the matter did not fall within the “strict” observance of the vow.

²⁰⁶ DE ALDAMA, *Cons.*, p. 209, points out that although the Montmartre vow may have been the “germ” of the fourth vow, “The concrete object of the vow of Montmartre, especially what refers to the so-called ‘papal clause,’ is not wholly clear. This is so because the formula used by the fathers has not been preserved, and although contemporary testimonies coincide in substance they differ on numerous important points” (ibid.). See also his article, “Peculiarem curam circa puerorum eruditionem,” in *Recherches Ignatiennes*, Rome, *CIS*, 1977, vol. 4, no. 5, pp. 1–23.

²⁰⁷ O’GORMAN, p. 21. See *Determinationes Societatis in ConsMHSJ*, 1, p. 10.

this offering was to safeguard the “surer direction of the Holy Spirit” in the choice of apostolic ministries to be undertaken by the Society. But, one should recall, at the time this was decided coadjutors were not foreseen; the Society was to consist only of those who came to be known as professed members. When coadjutors were incorporated into the body of the Society, it was, however, the same Society to which the professed belonged, permeated by the same spirit, governed by the same foundational principles, ends and means, even if coadjutors were not ordinarily to receive missions directly from the pope.

The style of this “apostolic life” which is identified with the original ideal of the Society, to help souls “[...] is described in the sense [...] which St. Thomas, with his characteristic clarity and precision, defined, saying that the apostolic life consists in this, that the apostles, having left everything, went out through the world evangelizing and preaching, as is seen in Matthew 10.”²⁰⁸ In fact, Ignatius and the early companions favoured St. Thomas, especially for his “scholastic doctrine,” a bias safeguarded in the *Constitutions*.²⁰⁹ But more importantly, the synthesis of Thomas “[...] coincided with the Jesuit’s conviction that in their pastoral activities they should not only rely upon God’s grace but also use all the ‘human means’ at their disposal, as the *Constitutions* prescribed.”²¹⁰

This backdrop of the companions’ pastoral, ministerial approach, and the obedience proper to it, must, of course, be measured against the fundamental commitments made by each one in prayer through the *Spiritual Exercises*. There the image of Christ as the King and eternal Lord of all things, is carried into the Two Standards, where the companions are called to stand beneath the standard of Christ, the supreme leader, to be goaded and tempted by Satan and his

²⁰⁸ DE ALDAMA, *Cons.*, pp. 13–14. Cf. ST. THOMAS, *Contra impugnantes cultum et religionem*, Chapter 4.

²⁰⁹ GANSS, *Cons.*, [464]. See also O’MALLEY, *The First Jesuits*, pp 247–251, for a brief but nuanced summary of the relationship between St. Thomas and the Society.

²¹⁰ O’MALLEY, *The First Jesuits*, p. 249 and p. 428, note 40, which refers to *Cons.*, [147–162].

army of innumerable deamons, scattered "[...] throughout the whole world, so that no province, no place, no state of life, no individual is overlooked";²¹¹ and culminates in the offering of the *Contemplatio*:

Take, Lord, and receive all my liberty, my memory, my understanding, and my entire will, all that I have and possess. You have given it all to me. To you, Lord, I return it. Everything is yours; do with it what you will. Give me only your love and your grace. That is enough for me.²¹²

The intention here is to focus upon the "interior movements," or the spiritual commitment of one engaged in prayer and *not* to suggest any military understanding of obedience, much less that Ignatius or the companions understood themselves as soldiers, something for which the Society has in the past mistakenly been accused. One must be aware, however, that the style of writing commonplace in the sixteenth century included such strong similies and metaphors. And also that the writing contained, often in exaggerated form, what J. C. Murray aptly called the "classical" concept of authority which G. Ganss identifies with Ignatius' world view, "[...] the prevalent sixteenth century worldview in which the universe was ordered from the top downward, in which the benefit of every doubt was enjoyed by persons in authority, and in which both religious and secular authority was invested with a sacral character."²¹³ Or, as Lucas says: "For churchmen

²¹¹ *SpEx.*, [91-99], [135-148].

²¹² *SpEx.*, [234].

²¹³ O'MALLEY, *The First Jesuits*, p. 353. In the 1553 letter on obedience Ignatius writes: "It is by this means that Divine Providence gently disposes all things, bringing to their appointed ends the lowest by the middlemost, and the middlemost by the highest. Even in the angels there is the subordination of one hierarchy to another, and in the heavens and all the bodies that are moved, the lowest by the highest, and the highest in their turn, unto the Supreme Mover of all" (W. J. YOUNG, trans., in *Letters*, p. 295, quoted in O'MALLEY, *The Fourth Vow*, p. 57, note 79). In the next paragraph of the same letter, Ignatius goes on to say: "We see the same on earth in well-governed states, and in the hierarchy of the Church, the members of which render their obedience to the one universal Vicar of Christ our Lord. And the better this subordination is kept, the better the government." Cf. also, the excellent study in FUTRELL, ch. 3, p. 56 ff., in which he considers the Basque and Castilian cultural influences on Ignatius' conception of the nature of authority. On p. 60 he includes this amusing note: "[...] A curious and rather frightening indication of the extent (only theoretical!) of the power of the father of a family, as well as of the necessity of absolute loyalty to the Señor, is given in the law of the *Partidas*, coldly entitled: 'Cases in which the father may sell or pawn or eat his son.' Underlying the law is the old Roman notion of the father's power of life and death over his children. The rights are specifically denied to the mother. It reads:

of Ignatius' time, there was no neat distinction between Church and World: the two were considered as coextensive."²¹⁴

From that world view sprang his desire to cooperate with Christ in the gradual accomplishment of God's redemptive plan as it unfolds in the history of salvation; to cooperate, that is, with Christ as prolonged and living in His mystical body, and in His vicar as its head on earth, and in all who derive jurisdiction from him, including the superiors of the Society [...] This profound intuition inspired and controlled the foundation and organization of the Society and the development of Ignatius' concept of obedience. He desired to have a company or cohort of devoted men ready for any task needed by the pope, the Vicar of Christ as King; and he hoped that many fit persons would volunteer for service in that company. All this required obedience as a principle of unity, cooperation, and coordination. In Ignatius' concept, the foundation of obedience is authority derived from God through Christ to the pope, who in turn delegated it to subordinate officials such as bishops and religious superiors. What descends from God, at least in ordinary cases, is not new divine light on the problem under consideration, but the right to decide and command. This right is usually exercised after consultation, reflection and prayer. These superiors, therefore, command 'in the place of Christ' (*en lugar de Christo*), but should do so according to the 'pattern set by Peter and Paul.' [...] Obedience is the act by which the subject freely makes a legitimate command of the superior his own will and carries it out. He thereby cooperates with the company of his fellow members toward upbuilding the Church.²¹⁵

"When it happens that a father is suffering from great hunger and that he is so poverty-stricken that he has no other recourse, and this fact is well known to everyone, he may sell or pawn a son who is in his power, in order to buy something to eat, since, by so doing, both the father and the son will be spared the death which otherwise could not be avoided. If the father finds himself surrounded in a castle which belongs to his Lord, and if he is so tortured with hunger that he can feel nothing but the need of eating, he may eat his son with no guilt before he may surrender the castle without the command of his Lord" (II, pp. 64-65).

²¹⁴ LUCAS, p. 164. As an authority LUCAS points out in note 359 that: "[...] the metaphor of the 'vineyard' or 'Christ's vineyard' for the world appears fifteen times in the *Constitutions*." Cf. DE ALDAMA, *Missioning*, pp. 4, 73.

²¹⁵ GANSS, *Cons.*, p. 247, note 4. Ganss includes several citations and references to those who develop these ideas. He points out that while an example of Murray's "classical concept" may be seen in *Satis cognitum* of LEO XIII, Ignatius provided that "[...] subjects participated in preparing the decision, far more than did Leo" (ibid). Cf. RAINIER, "Obedience." The pattern set by Peter and Paul can be found in 1 Pet 5: 1-3; Phil 3: 17; 2 Thess 3: 7-9; 1 Tim 4: 12; and Titus 1: 7 (see GANSS, p. 69, note 13). DE ALDAMA says this: "[...] it is well to recall that the Fathers and medieval writers, basing themselves on some words of Peter (1 Pet 1: 22) about obedience in obligatory things, which they call an 'obedience of necessity' (*obedientia necessitatis*), contrast it with an 'obedience of charity' (*obedientia caritatis*) which is extended to everything, even to the impossible: 'One should obey out of charity' (*ex caritate [...] oboediati*), Benedict said in a famous passage of his Rule (Chapter 68, 5). According to Bernard, the only limit is death in imitation of Jesus Christ, who was obedient to death and even death on the cross" (id., *Cons.*, p. 220).

For the early Jesuits it was not only devotional, it was a matter of practical, apostolic efficiency to understand that their obedience should be given first to the pope, the Vicar of Christ, the Universal Pastor of the Church, the one with the best information, perspective and certainly the authority regarding the needs of the flock. “*The more universal the good is, the more it is divine*” [622, d], the principle previously enunciated in the section dealing with the fourth vow, was applied not only to missions from the pope, but also to the obedience of every Jesuit, indeed to the heart of the Institute’s pastoral, apostolic self-understanding, since the Jesuit was understood to be a man on a God given mission, one who seeks to do the will of God.

Summary

Ignatius did not set out to found a religious community in the Church, but his spiritual experiences inevitably led him and his companions to do so. The Society of Jesus required that all its members be available to undertake “missions,” and this intention was expressed in a vow to be taken by the “professed” of the Society: “I further promise a special obedience to the Sovereign Pontiff in regard to the missions [...]” By the time it was necessary to clarify and interpret the particulars of the institute by writing *Constitutions*, a task which occupied Ignatius for the rest of his life, the Society’s way of proceeding in the Lord had already become clear. Nadal characterized it as: *spiritu*, with the spirit; *corde*, with the heart; and *practice*, with a view towards practice.

The four books, with equal juridical value, which comprise the *Constitutions*, are longer than most comparable documents and are marked by flexibility and moderation necessary to the essential missionary character of the order. Ignatius anticipates that Jesuits will experience personal and spiritual growth. Thus, except where necessary, they do not bind to observance under pain of sin, and the superior almost always has the power to dispense from them.

Part VII, which concerns missions, is adapted almost in whole from the *Constitutiones circa missiones*. After the *Spiritual Exercises*—the Society’s true foundational document—and the *Declarations on Poverty*, it was the first item Ignatius addressed in writing. Part VII contains four Chapters: Chapter One deals with missions from the pope and clarifies the meaning of the fourth vow which “[...] was not to designate a particular place but to have the members distributed throughout the various parts of the world [605]. A professed Jesuit is to be free and indifferent, always ready to be sent, without excuse nor ambition, without requesting provisions for the journey nor causing a request for anything temporal to be made. If not otherwise specified the mission is to last for three months and if the time is prolonged the one sent is free to make excursions to nearby regions for the help of souls.

Chapter Two concerns missions from the superior of the Society. It first addresses the mission faculty which Ignatius requested from the pope to clarify any doubts as to whether the superior had the authority to send the professed on missions, and so as to proceed “[...] with greater security for those who go [...]” [618]. The authority, granted in the bull *Licet debitum* and incorporated into the *Constitutions*, became part of the corpus of the proper law of the Society. The rest of the Chapter outlines the criteria for apostolic selection, or the norms for the selection of ministry, the chief being: “the more universal the good is, the more it is divine.”

Chapter Three addresses missions to larger regions without specification of place or activity, the circumstance which most closely reflects the original inspiration, motivation and desire of the companions regarding mission. Chapter Four discusses houses and colleges of the Society. In this connection Nadal made a wonderful contribution where he said that “[...] the characteristic and most perfect house of the Society is the journeys of the professed [...].” He likened stable residences to garrisons from which the professed go out to do battle against the enemy.

A review of the notion of “mission,” especially in the foundational documents of the Society, leads to the understanding that for the early Jesuits it had the meaning of “sending.” O’Malley points out that the Spanish *misiones* is used as the equivalent for the Latin *peregrinationes*, and he settles for the translation “journey” understood as bearing with it the understanding of “pilgrimage.” This view is consistent, not only with the contributions of Nadal, but also of its use in the early works of Ignatius, in the *Formula of the Institute* and the *Constitutions*. It is also clear that mission was the first and most important undertaking of the Society, was at the heart and soul of its self-understanding and had a decisive, determining effect on all the other structures which were developed in the Society of Jesus.

Evangelical obedience in the Society arose out of a desire to maintain the union and the preservation of the company. Like most structures of the Society, it evolved over time due to the

insights gained through usage and experience. In the *Constitutions*, which are normative for the interpretation of Ignatian obedience, it is addressed directly in Part VI, but also in Part VIII, which concerns the union of the members. It is no surprise that Ignatius structured and applied obedience in light of its apostolic, ministerial efficacy, and it is first of all pastoral in nature.

Ignatius maintains the long established principle that the superior holds the place of Christ. The spirit of obedience is that of love, not fear, and its tone should be balanced between firmness and sweetness. Jesuits are exhorted to distinguish themselves, not only in matters which pertain to the juridical obligation of the vow, but also in matters which pertain to its virtue or spirit or higher perfection. Unlike the virtue of obedience, the canonical obligation is circumscribed by limits. A superior may command only that which conforms to and is required for the good observation of the rule. Commands may not be contrary to the moral law, and religious can not be held to a strict obligation “[...] in those matters which may be *supra* (above), *contra* (against), *infra* (below) the law.”

Ignatian obedience, with its three degrees of perfection: the execution, the willing and the understanding, are supported and developed through several structures, perhaps the most important being the manifestation of conscience—the heart of the Society’s internal forum government—together with representation, broad consultations, visitations, regular letter writing and spiritual conversations. It is surprising to some that in the Society of Jesus even evangelical obedience is to be “[...] shown *first* to the Sovereign Pontiff and then to the superiors of the Society” [547]. But this is quite consistent with Ignatius’ world-view and with his Basque education and perceptions regarding authority. But even more importantly, for the early Jesuits obedience shown first to the pope, the Vicar of Christ, acted as the guarantee for missions. This is understood in that the motivational statements which pertain to the fourth vow, “[...] for the sake of our greater devotion in obedience to the Apostolic See, of greater abnegation of our own

wills, and of surer direction of the Holy Spirit" [4], apply not only to the professed, but to the obedience of every Jesuit who understands himself to be a man on a God given mission.

The structure of Ignatian obedience is summarized by J. Futrell:

First, Jesuit obedience must be total, perfect, loving, joyful. Second, this obedience is essentially a means to the apostolic end of the Company, the 'scope of our vocation' which supposes the total commitment of each companion to the corporate vocation, and as a result is a means to the bond of love uniting all the members with one another and with their head—a union realized in perfect obedience. Third, a personal spiritual motivation of seeing Christ giving commands through the superior because of the role of the Company as an apostolic instrument of the Church helps the companions to love and reverence the superior and, so, to obey him perfectly. Fourth, perfect obedience is threefold: prompt and joyful execution of the command by the companion based on conformity of his will and of his judgement to that of the superior. Fifth, for one to obey promptly and joyfully and to persevere in obedience, 'blind' obedience may be necessary. This expression refers to the perfect obedience of understanding achieved when that which is commanded, being contrary to one's own judgement, is found good because of the 'scope of our vocation.' Sixth, in conforming himself perfectly to the judgement of the superior in perfect obedience, the companion achieves greater conformity with the will of God according to the 'scope of our vocation.' Seventh, external and interior obedience is possible only if one has attained true spiritual liberty, centering his desires not upon himself, but uniquely upon the service and praise of God.²¹⁶

At the beginning of this Chapter, canons 16 and 17 pointed out some of the principles of interpretation of a juridical text. In the course of the study it was further found that obedience is to be interpreted and understood according to the universal law and the proper law of the institute. Considerable time was devoted to the purpose of the Society, the circumstances of its development and the intentions of the first companions. Now, having considered the development of the *Constitutions*, significant issues which arose in the course of their drafting, and having focused on those Parts which treat the third and the fourth vows, it is possible to address the questions which were raised at the end of Chapter Two. The next Chapter will focus specifically on the relationship of the two vows of obedience, the authority of the pope and the superior general, and the relationship of the Society with the Holy See.

²¹⁶ FUTRELL, pp. 175-176.

CHAPTER FOUR

THE JURIDICAL PAST, PRESENT AND FUTURE OF THE FOURTH VOW

At the end of Chapter Two several questions were asked: how do the two vows of obedience in the Society relate to each other? Is there a difference between the obedience of the professed and that of the coadjutors? What is the nature of the authority of the pope and the authority of the superior general over the professed members of the Society? Are there juridical limits which affect the authority of the pope or of the superior general? To these, an additional question must be added, what are the limits of strict obligation incurred by those who profess the fourth vow? As the discussion will show, the matter has been considered since the time when Cardinal Ghinucci first raised the question in the sixteenth century prior to the founding of the institute. But owing on the one hand to inaccuracies, and on the other to a hagiographical historiography, a solution has not been found that adequately and accurately balances all of the essential elements related to the issue: the intention of the founders; a proper interpretation of the universal law; the proper law of the Society; the long time praxis of both the Holy See and the Society on the matter; and the lived experience of Jesuits.

This Chapter, will address these issues and will be divided into three parts. Part I will review the early history of the interpretation of the fourth vow. Part II will have five sections. The first will summarize the historical development of the juridical understanding of the fourth vow. The second section will identify problems raised by two contemporary commentators and respond to them in light of the new legal relationship between the pope and the companions which was established when the Church approved of the founding of the Society. With the assistance of the universal law and the proper law of the Society, attention will be given to how the

Constitutions, especially the vow formula, and an understanding of the notion of faculty assist in resolving the questions raised above—the understanding of the two obedience vows, the source of the superior general's authority over the matter of missions, and the relationship of the Society to the Holy See. The third section will reestimate the principal canonical issues in light of the renewed legal context brought about by the Second Vatican Council, and especially through the revision of the Code of Canon Law. The fourth section will estimate several consequences for the Society as a result of the renewal of the law, and the fifth will address whether the fourth vow has "doctrinal" implications. Part III will look to the future, and suggest possible developments which may occur regarding the evolution and the application of the fourth vow.

Part I: The Past

Surprisingly little work has been done on this topic until recently, owing, no doubt, to the legislation which formerly existed in the Society requiring the permission of the superior general to write on matters that touched on the substance of the Society. Several authors, however, stand out as having made worthy contributions. P. Leturia, B. Schneider, J. Pejska, and the early work of J. Gerhartz help to frame the canonical questions regarding the obligation of the fourth vow which were first raised by figures as early as Cardinal Ghinucci, Nadal and Ribadeneira.¹ T. Sanchez and especially Suarez enter into the discussion, and they are followed by more recent authors.

¹ The most important works of LETURIA include: "A las fuentes de la 'Romanidad' de la Compañía Societatis Jesu," in *Estudios Ignacianos*, 2 vols., (Rome, *IHSJ*, 1957), vol. I, pp. 239-256; and "Sentido verdadero en la Iglesia militante," (*ibid.*, vol. II, pp. 149-174). B. SCHNEIDER builds on Leturia's writings in "Nuestro principio y principal fundamento: zum historischen Verständnis des Papstgehorsamsgelübde," in *AHSJ*, 25 (1; 56), pp. 488-513 (= SCHNEIDER, "Nuestro principio"). J. GRANERO critiques Schneider's analysis in "San Ignacio de Loyola al servicio de la Iglesia," in *La ciencia tomista*, 83 (1956), pp. 526-572. SCHNEIDER then responds to GRANERO in "Der hl. Ignatius von Loyola im Dienst der Kirche," in *Gregorianum*, 39 (1958), pp. 137-146. J. GERHARTZ, "*Insuper Promitto...*" *die Feierliche Sondergelübde katholischer Orden*, Rome, *Analecta Gregorianum*, 1964, (= GERHARTZ). Other more recent contributions will be treated later.

Leturia sketches the historical state of the fourth vow around 1534, when the first companions pronounced the Montmartre vows, at which time, he contends, they did not intend to constitute a religious order but to strengthen their fraternal ties.² He indicates that there is a difference between the two vows of obedience, the mission vow of obedience to the pope, and the later vow of obedience to one of their own number. Leturia proposes that the companions were constituted a religious order “[...] through the vow of obedience to one of their own number.”³

B. Schneider places the emphasis in a different direction by saying that the vow of obedience to the pope is the fundamental basis of the order, and that because of its unique character, already in 1534 the first companions had taken upon themselves the obligations of a religious order.⁴ The papal vow, he argues, is the very “principle and foundation” of the Society, and that in the mind of Ignatius, this “second” vow of obedience, to one of their own number, takes on meaning only in light and in terms of carrying out the missions vowed through obedience to the pope.⁵ While there is much merit to Schneider’s observation, that the third vow can be properly understood only in light of the fourth vow, it was indicated earlier that canonically one becomes a religious by pronouncing the three “essential” vows of religious in a religious community. What, however, is the meaning of any “additional” or “extra vows” that are pronounced in some religious communities?

² P. LETURIA, “El voto de San Ignacio en Montmartre,” in *Estudios Ignacianos*, vol. 1, p. 409.

³ Cf. P. LETURIA, “Importancia del año 1583 en la cumplimiento del voto de Montmatre,” in *AHSJ*, 9 (1940), pp. 188–207. Cf. also, J. ITURRIOZ, “Dos líneas de ‘obediencia’ en la compañía de Jesús,” in *Manresa*, 43 (1971), pp. 59–78; and G. MADARIAGA, “La obediencia al papa según las deliberaciones de 1539,” in *Manresa*, 49 (1977), pp. 55–68. See SHANAHAN, p. 2–3.

⁴ SCHNEIDER, “Nuestro principio,” pp. 501–504. “Alle diese Einzeltatsachen zeigen, wie sehr das Montmartregelübde bereits faktisch aus der Privatsphäre des Einzelnen herausgenommen erscheint und die Struktur einer Gemeinschaftsorganisation abgibt” (id., p. 504).

⁵ “Für sie war und ist der Papstgehorsam das Primäre, das «Fundament und Prinzip» ihres Ordens, während das Ordensgehorsamsgelübde dazu abgeihres Ordens besser erfüllen zu können” (SCHNEIDER, “Nuestro principio,” p. 512). Cf. also O’MALLEY, *The Fourth Vow*, p. 3.

J. Pejska says that the purpose of additional or “accessory” or “accidental” vows is “[...] to bind a member more firmly to the order or to seek to avoid abuses against the three major vows of religion.”⁶ These additional vows, sometimes called fourth vows, were addressed by the Council of Trent (1545-1563) where it says in its decrees on religious:

[...] that all regulars [...] should order and arrange their lives according to the provision of the rule they profess; and that above all they should faithfully observe what belongs to the perfection of their profession, such as the vows of obedience, poverty and chastity, and any other special precepts particular to any rule or order which belong to their essential nature and to the preservation of common life, food and clothing [...].⁷

It is significant that the Council speaks of accessory vows in relation to the essential nature and character of a particular religious order, and as such they are to be upheld and honoured.

J. Gerhartz, in his doctoral thesis, substantially agrees with Pejska, but adds several important refinements. Gerhartz indicates that all of these vows—accessory, accidental, additional—fit into a category which he prefers to call “special” vows. As Shanahan points out, “He prefers calling them ‘special’ vows rather than accidental vows since the latter find their point of reference only in consideration of the three ‘essential’ or substantial vows.”⁸

Gerhartz finds support for this view in the above-cited quotation from the Council of Trent; Trent avoided the ‘essential-accidental’ dichotomy for the more generic ‘peculiar vows’ that relate to the essential features of the religious state such as community and manner of life. [...] The fact that there are other vows apart from the three substantial vows of religion, which vows are at the same

⁶ “1. SCOPUS VOTI ACCESSORII. Vota accidentalia eo consilio introducta sunt, ut professi fini secundario Instituti firmitiore vinculo addicti existant vel ut abusus graviores contra vota substantialia efficacius a societate avertantur” (J. PEJSKA, *Ius canonicum religiosorum extravit Dr.* [= PEJSKA], ed. 3^a post primam et alteram privatim pro manuscripto impressas, Freiburgi Brisgoviae, Herder, 1927, p. 145). SHANAHAN, pp. 11-20 addresses this issue.

⁷ “[...] ut omnes regulares, [...] ad regulae quam professi sunt, praescriptum vitam instituunt et componant atque in primis, quae ad suae professionis perfectionem, ut obedientiae, paupertatis [,] et castitatis ac si quae alia sunt alicujus regulae et ordinis peculiaria vota et praecepta, ad eorum respective essentiam, necnon ad communem vitam, victum [,] et vestitum conservanda pertinentia, fideliter observent [servent]” (Concilium Tridentinum, sessio XXV, caput I, in *Conciliorum Oecumenicorum Decreta* [Rome, 1962], TANNER, p. 776). See SHANAHAN, p. 12.

⁸ SHANAHAN, p. 12. “Wir aber möchten die Bezeichnung «Sondergelübde» bevorzugen. [...] Die Bezeichnung «votum accidentale» ist zwar richtig und auch exakt, wenn man das Gelübde *nur* im Hinblick auf die drei wesentlichen Gelübde, dei «vota essentialia», sieht” (GERHARTZ, p. 21).

time characteristically essential to an order (such as the vow of stability of the Benedictine Order), leads to the proposal of the term 'special' vows (*Sondergelübde*) as the most accurate way of describing what is commonly called the fourth vow.⁹

Gehartz makes his most significant contribution where he addresses the purpose of these "special vows" and groups them according to their object or end. He indicates that these "special vows" are taken "either for securing and protecting the aim of the order (*Sicherungsgelübde*) or as a direct expression of the special end or goal of a particular religious order (*eigentliche Sondergelübde*)."¹⁰ The first (*Sicherungsgelübde*), he considers to be the least characteristic of the special vows.¹¹ He indicates that their primary object is the protection of the three primary vows, especially poverty, and that the few solemn vows of "protection" are grouped around not ambitioning offices or dignities in the Church.

The vow of 'humility' is the positive expression of not ambitioning offices and dignities within the Church. Its aim is the avoidance of the privileges and dispensations that accrue to prelates and other Church dignitaries. These offices and dignities were seen as disruptive of the common life, rules and living style of the religious life. Principally, the vow 'secures' the substantial vow of poverty. The vow of humility took on special significance during the period of the Reformation when the abuses of benefices came into sharp relief. The Barnabites, founded in 1530, were the first order to be approved for such a vow. Their formula implies that the dignities of office even within their own

⁹ SHANAHAN, pp. 12-13. "Das Konzil spricht also nicht von «vota accidentalia», sondern von Sondergelübden, «vota peculiaris». Das Konzil hebt durch seine Wortwahl «ad eorum respective essentiam [...] pertinentia» hervor, daß in diesen besonderen Gelübden nicht nur etwas Zusätzliches des betreffenden Ordens, sondern sein Wesen zum Ausdruck kommen kann; daß der Gegenstand der Gelübdeverpflichtung und vielleicht das Gelübde selbst—so «zusätzlich» und «zufällig» beide auch für den Status des Religiösen in sich gesehen sein mögen—ein charakteristischer Wesensbestandteil einer religiösen Gemeinschaft sein können" (GERHARTZ, pp. 22-23).

¹⁰ GERHARTZ, pp. 29-30.

¹¹ SHANAHAN, p. 13-14. "Es sind dies die am wenigsten charakteristischen Sondergelübde. Gäbe es nur sie, so wäre für die besonderen Gelübde der Terminus «Zusatzgelübde» unter jeder Rücksicht zutreffend, da sie dem betreffenden Orden weder eine Sonderform seines Lebens noch eine Sonderart seines Wirkens geben wollen (die Gelübde, die das tun, nennen wir «eigentliche Sondergelübde») sondern nichts anderes bezwecken, als durch ihre über die drei wesentlichen Gelübde hinausgehende zusätzliche Verpflichtung Geist und Leben des Ordensstandes ganz allgemein oder aber besondere Wirk—oder Lebensformen bestimmter Orden vor äußeren Einflüssen zu schützen und gegen inneren Zerfall zu sichern" (GERHARTZ, pp. 29-39).

congregation are not to be sought. In the case of non-clerical fraternal orders, the members are forbidden to seek the clerical state.¹²

The second he calls "proper" special vows "because they express the particular goal of the order in which they are taken; they carry with them the special essence and the individual character of the order."¹³ These "proper" special vows Gerhartz groups in three categories concerned with: social action;¹⁴ "[...] a particular discipline that characterizes a life form";¹⁵ and a special vow of obedience to the pope.¹⁶

As was mentioned earlier, Cardinal Ghinucci held that the fourth vow was superfluous since every Christian, or at least the clergy, was already bound to obedience to the pope. His objection seemed to be satisfied, or at least quieted, when the motivating reasons for the vow were written into the *Formula of the Institute*, namely: greater devotion in obedience to the

¹² SHANAHAN, p. 14, note 31. "Das «votum non-ambiendi» wird der positiveren Bezeichnung mancher Orden auch «votum humilitatis» genannt. Dieses Gelübde verpflichtet in den Orden, in denen es auferlegt ist, die Mitglieder des Ordens, denen der Zugang zu den Ämtern und Würden offensteht; sei es nun gemäß den einzelnen Ordenssätzen zu den Würden innerhalb des Ordens, sei es gemäß der allgemeinen Gesetzgebung zu den Würden der Kirche. [...] Die kirchlichen Ämter und Würden bringen Privilegien und Dispensen und zersprengen die «vita communis», die religiöse Gemeinsamkeit des Lebens nach den Regeln und Gewohnheiten des Ordens. Zum Schutze des Ordenslebens und zur Sicherung des Bestandes des Ordens und seines Geistes verpflichtete man sich daher in einem besonderen und nicht anzunehmen" (GERHARTZ, pp. 34–35. Cf. also pp. 37, 39).

¹³ "In ihm behandeln wir nun die Sondergelübde *im eigentlichen Sinn des Wortes*. Es sind dies Gelübde, die den besonderen Wesenszug, den individuellen Charakter und oft genug das ursprüngliche Ordensziel einer bestimmten Ordensgemeinschaft am prägnantesten zum Ausdruck bringen und es immer wieder neu in ihrer hohen Verpflichtung dem Orden und seinen Mitgliedern einprägen" (GERHARTZ p. 77). Cf. SHANAHAN, pp. 14–15

¹⁴ Orders with these vows include the Camillians (c. 1584) and many other hospital orders—such as *Ordo Hospitalarius S. Joannis a Deo* (The Brothers of St. John of God) the Hospitallers of St Hippolitus, the Bethlehemites, and a whole group of sisters' hospital orders—who have a solemn vow to care for the sick; the Piarists and the Ursulines with a vow to educate the young. See GERHARTZ, pp. 129–142.

¹⁵ SHANAHAN, pp. 15–16. The best example of such vows are those pledging a life of fast and abstinence, such as the Minims and the Poor Clares. The Minims vow to a "vita quadragesimalis," an ascetical life of abstinence from meat, eggs and dairy products. "The Minims, named for the 'least' of the gospel, saw their fast as purifying the mind, raising the senses, subjecting the body to the spirit and removing concupiscence" (GERHARTZ p. 168, and A. BILLANTONIO, "Minims," *NCatEnc*, 1967, vol. 9, pp. 869–870). Another vow in this category is the vow of cloister.

¹⁶ Probably the earliest orders to have a special bond of obedience to the pope were the orders of knighthood (twelve of which came into existence between 1000–1300), based either on the Templars or the Knights of Malta. They generally responded to the needs of the Holy Land, "[...] particularly for the protection and safe conduct of pilgrims from Europe to the Holy Land (Templars) and for the care of the sick pilgrims along the journey to and in Jerusalem (Knights of Malta)" (SHANAHAN, p. 18, quoting from A. GROSSCHMID, "Templars," in *NCatEnc*, 1967, vol. 13, pp. 992–994).

Apostolic See; greater humility, mortification and abnegation of our own wills; and later, the desire to obtain the surer direction from the Holy Spirit in the choice of apostolic missions [4]. These reasons do not necessarily indicate that the obligation of the fourth vow is greater than, or even different from, the obligation of other clerics, but, as is reasoned by Gerhartz, they do show grounds to assume a commitment with an express vow.¹⁷ Also, recalling the distinction between the strict juridical obligation of the vow and the virtue of the vow, it should be pointed out that all three motivations are devotional, or of the spiritual order. That is not to say that the vow has no juridical consequences. Of course it does. The question is, what specifically is the matter of strict obligation?

The juridical backdrop pointed out by de Aldama must be kept in mind:

The obligation of religious to obey the pope in virtue of the ordinary vow of obedience was not common doctrine at the time. In his commentary on the *Secunda-Secundae*, and basing his argument on words of Bonaventure, Cardinal Cajetan had indeed maintained that the pope was the first or highest superior of religious, but up to the promulgation of the Code of Canon Law in 1917 it was a moot question whether his authority derived from his universal jurisdiction or also from the vow of obedience; in other words, whether in addition to the jurisdiction he also had 'dominative power' over religious, just as have internal superiors.¹⁸

It goes without saying that most of the first companions were not concerned with the question framed precisely in this way. Lainez did consider whether the fourth vow was possible, but, like Cardinal Ghinucci, he viewed the issue "[...] only as related to the common obligation of every Christian to obey the pope."¹⁹ He concluded that "[...] one can bind himself by vow to observe something he is already bound to for some other reason,"²⁰ an obligation T. Sanchez would

¹⁷ Cf. DE ALDAMA, *Missioning*, p. 33. The term "express vow" is one Ignatius often used when referring to the fourth vow, see *Cons.*, [7, 617], and *ConsMHSJ*, 1, pp. 10, 159, 241.

¹⁸ DE ALDAMA, *Missioning*, p. 34.

¹⁹ DE ALDAMA, *Missioning*, p. 34.

²⁰ DE ALDAMA, *Missioning*, p. 34. Cf. C. DALMASIES, "Le esortazioni del P. Lainez sull'Examen Constitutionum," in *AHSJ*, 35 (1966), p. 135.

characterize as “intensively greater” but “extensively identical.”²¹ Suarez, too, expressed a like opinion where he said: “such a vow adds a greater intensity of obligation, even if it does not extend the sphere of obedience [...]”²² And Nadal held that religious had a greater obligation of obedience to the pope, but indirectly, since the subject is bound by obedience to the superior general who by his vow of obedience is bound to obey the pope.²³

P. de Ribadeneira²⁴ was probably the first

[...] to point to the special obligation of all religious to obey the Pope as a possible objection against the fourth vow. They, like the rest of the faithful, owe him obedience ‘not only because he is the head of the Church and Vicar of Christ, but also because he is their highest superior’ and ‘they are subject to him even more than to any lower superior of theirs.’ Ribadeneira’s answer was that the fourth vow binds the professed of the Society to things to which no other religious order is obliged.²⁵

T. Sanchez, agrees in principle with Ribadeneira, but, according to de Aldama, his reasoning is more clear and accurate. Sanchez says that the obligation of the fourth vow is “extensively greater” than that of a third vow since:

The obligation of a religious who takes the vow of obedience is ‘*secundum regulam,*’ in conformity with their rule: ‘The other faithful are not bound to obey the pope if he sends them to preach the gospel in far away countries and among the infidels, unless in a special case, required by the need of the common good

²¹ T. SANCHEZ, *Opus Morale in praecepta decalogi*, (= SÁNCHEZ), Bk. VI, ch. 18, n. 3).

²² W. HUMPHREY, *The Religious State: A Digest of the Doctrine of Suarez, Contained in His Treatise ‘De Statu Religionis,’* (= SUAREZ), London, Burnes and Oates, [1884], vol. 3, p. 202. We shall return to some apparent contradictions on this matter expressed by Suarez.

²³ DE ALDAMA, *Missioning*, p. 34. “[...] quandoquidem (religiosi) oboedientiam vovent suo superiori generali, hic Summo Pontifici” (*MonNad.*, V. p. 152). Cf. *Scolia*, p. 382, where he says it was enough that the pope distributed the workers “[...] ex sola praelatorum nostrorum oboedientia.”

²⁴ “Pedro de Ribadeneira, a page in the service of Cardinal Alessandro Farnese, one day played truant from his duties and, afraid to return, sought refuge at the house where the companions were staying. He liked what he saw, and in August 1540 Ignatius received him into the Society. Ribadeneira was fourteen years old. Of lively disposition and intelligence, he had an especially close relationship with Ignatius and wrote his first biography, 1572” (O’MALLEY, *The First Jesuits*, p. 36).

²⁵ “P. DE RIBADENEIRA, *Tratado en el cual se da razón del Instituto de la Compañía de Jesús*, Madrid, 1605, ch. XX, pp. 158-169” (DE ALDAMA, *Missioning*, p. 34).

of the Church. Nor are the religious bound to do likewise in virtue of the general vow of obedience they make in their profession, because that would exceed their institute [...]. Besides, should the pope have power to oblige them in virtue of the vow of obedience, he would not have power to oblige them to go on foot, without requesting any expenses for the journey or to a pagan country, even the farthest, where the Roman Pontiff might wish to send them, even if the need of the common good might not demand it.²⁶

The principle first enunciated by Bernard of Clairvaux might be recognized here, “only that which I have promised can be demanded of me. [...] the command or the prohibition of the superior must not go beyond the limits of the monk’s profession [...]”²⁷

It is interesting to appreciate that the early discussion of this issue focused on how the fourth vow was different from, or added to the third vow. In general, it was thought that the third vow covered in principle all aspects of the commitment of obedience, but it was possible to amplify that commitment with a greater intensity through an express vow that helped protect the three evangelical counsels, highlighted and focused the essential goal or end of the institute, and specified elements not expressly covered in the third vow. In the case of the Jesuit mission vow, its presentation in the *Constitutions* provided for the professed of four vows not to seek, but to accept without argument, missions from the pope, to go on foot, even to pagan countries, and without requesting provisions for the journey—considerations not absolutely required by the third vow. In this sense, it was argued, the fourth vow not only amplified the intensity of the obligation of obedience, but with regard to the particulars mentioned, it extended the obligation as well. These particulars mentioned in the *Constitutions*, thus specify the precise matter of juridical obligation incurred by the fourth vow. There is much to be said for this position.

²⁶ SANCHEZ, Bk. VI, Ch 18, n. 5 (DE ALDAMA, *Missioning*, p. 35).

²⁷ Cf. Chapter One, and Bernard’s *Opera*, Cap. V, cols. 768–769. Cf. also E. JOMBART, “Obéissance des religieux,” in *DDC*, ed. R. NAZ, Paris, Letouzey et Ané, 1935, vol. 6, especially col. 1050.

Part II: The Present

A. The Commentators

It is at this point in the argument, but many years later, that A. Delchard intervened to shift the ground of the discussion.²⁸ His appraisal was important enough to deserve careful analysis. After listing the various sources, Delchard attempted to address “problems in the juridical and moral order.”²⁹ He set up the question by saying that two vows of obedience cannot be pronounced unless they are distinct; the second vow must add a new obligation in relation to the first vow, either about the same matter, or about a new matter.³⁰ He then went on to say:

But, once the matter has been consecrated to God through the vow of obedience, it is not capable of a new obligation through a new vow of obedience—and no new matter is offered [by the fourth vow] because everything has already been promised through the vow of religious obedience.³¹

He asserted that there is an argument which closes all discussion: “the proper laws of the Society were approved by the Roman Pontiff after examining the question.” As will be suggested, this is no small observation even if Delchard does seem to gloss over it. For while the approval of the Society’s proper law does not necessarily close all discussion, it does represent a significant juridical moment affecting both the interpretation of the this issue, and the relationship of the institute with the Holy See.

²⁸ A. DELCHARD, “De quarto sollemni voto peculiaris oboedientiae Summo Pontifici circa missiones,” (= DELCHARD), notes written for the Thirty-First General Congregation and subsequently published in *Documenta selecta Congregationis Generalis XXXI*, Rome, CIS, 1973, pp. 33-45.

²⁹ “Problema in ordine iuridico et morali” (DELCHARD, p. 38).

³⁰ “Duo vota oboedientiae nequeunt valide emitti nisi sunt distincta—sive exinde quod alterum relate ad alterum addit novam obligationem circa eandem materiam—sive exinde quod alterutrum obligat ad materiam novam” (DELCHARD, p. 38).

³¹ “Atqui materia semel consecratata Deo per votum ob. non est capax novae obligationis per aliud votum ob., - neque ulla nova materia offertur, nam per votum ob. religiosae omnia iam promissa sunt” (DELCHARD, p. 38).

But, still, Delchard asked, how is this 'co-existence' of vows justified?³² He offered the view of Suarez who, he said, proceeded from the lesser to the greater difficulty.

(a) The fourth vow obliges to something not included in the vow of obedience of other religious institutes. All its attention is converted to the question of the missions and the circumstances which specify the matter of the vow, for instance, 'to go where we are sent.'

(b) The special vow of obedience towards the Roman Pontiff adds a new obligation to the common vow of obedience in the Society. Indeed, the fourth vow probably brings an 'intensivity' of obligation (the obligation is of the same type, but greater: on the one hand, although the special vow is of the same matter, this matter seems to have been made 'specific' through the special vow, and such a specification increases the 'voluntary' aspect; on the other hand, the vow is promised to the Roman Pontiff himself). The special vow also brings an 'extensive' addition, owing to the circumstances of obedience (without provisions, without excuse).

So the fourth vow is more serious; not only fitting, but most useful, and, even necessary, to the institute.³³

Even though the conclusions of Suarez were substantially in line with the preponderance of historical opinion on the matter, Delchard was not happy with this "solution." In fact, he declared that "Suarez's justification was not satisfactory,"³⁴ so he proposed an explanation of his own.

The substance of the argument offered by Delchard is as follows: because in the fourth vow obedience is promised to the pope himself, the *power* of sending belongs to him. When the superiors of the Society send a man on a mission, they do so "[...] according to the *faculty*

³² "Tamen certum est argumentum quo claudenda est disputatio omnis: leges propriae Societatis Iesu approbatae sunt a R. P. post examen quaestionis (1539-1540); cf. F.N.I. et III. At *quomodo iustificatur* haec 'co-existentia?' " (DELCHARD, p. 39).

³³ "a) Quartum votum obligat ad aliquid non inclusum in voto ob. aliarum religionum. Attentio eius tota convertitur in quaestionem 'missionum' et 'circumstantiarum' quae specificant materiam voti v.g., 'ire quovis mittantur.'
b) Votum speciale ob. erga R.P. addit obligationem novam voto communi ob. in Societate. Nam quartum votum probabiliter affert obligationis additionem *intensivam* (obligatio est eiusdem generis sed maior: ex una parte, quamquam votum speciale est promissio eiusdem materiae, haec materia videtur per votum speciale facta esse 'specificata' et talis specificatio auget voluntarium; ex altera parte votum promittitur ipsi Romano Pontifici). *Extensivam* quoque additionem affert votum speciale, ratione circumstantiarum oboedientiae (sine viatico, sine excusatione).

Ergo quartum votum est gravius; non tantum conveniens sed utilissimum immo, ratione Instituti nostri, necessarium" (DELCHARD, p. 39).

³⁴ "Iustificatio Suareziana [...] nequit satisfacere" (DELCHARD, p. 39).

granted by the Sovereign Pontiff [...],” by which the pope *habitually delegates* to the general (who can subdelegate it) the power to send on a mission. Thus, in matters pertaining to the fourth vow, the superior general acts with *ordinary, vicarious* power:

—First of all, the power is ordinary because it is attached to the function of Fr. General by virtue of the pontifical law itself (Paul III, 1542–1543: ad fideles; 1549: ad infideles), attached to his office.

—The power is vicarious and not proper because it is exercised in the name of another, that is, the Roman Pontiff.³⁵

Because of his decision, that the general’s power is *vicarious*, Delchard is able to go on to say:

The professed of four vows does not dedicate nor give in the third vow all the amplitude of his obedience to the internal superior of the Society; similarly in the fourth vow he does not dedicate nor give ‘especially’ all the amplitude of his religious obedience to the Roman Pontiff.

As far as the Roman Pontiff is concerned the professed (and only the professed) of four vows promised immediately (i.e., not mediated by Fr. General), ‘especially’ to the Roman Pontiff the obedience, and all the obedience, regarding missions (‘circa missiones’), i.e., apostolic, missionary obedience about the proper ministries of the Society.

Therefore, per se, only in apostolic matters can the Roman Pontiff send and command the professed of four vows by virtue of the special vow, and from this point of view the Roman Pontiff can be said to be the internal superior of the Society.

³⁵ “3. Ipse Romano Pontifici promittitur oboedientia in quarto voto. Quid de potestate collata vi voti huius specialis. Subiectum activum huius potestatis.

Potestas mittendi ratione ac vi voti quarti pertinet ad R. P.

Tamen in ipsis *Cons.*, [749] declaratur: ‘Idem Generalis [...] in missionibus omnem habebit potestatem [...]’

Potestas haec sponitur exerceri conformiter ad Institutum; at exercetur tam erga professos 4 vot. quam erga coadiutores, atque apparet quam plenissima, cum unica exceptione, nempe in casu ubi Sedes Apos. ipsa mandavit missionem aliquam.

Reapse non habentur duae auctoritates vel potestates parallelae. *Constitutiones* enim dicunt: ‘[...] Praepositi Societatis, iuxta facultatem eis a Summo Pontifice concessam, mittere quosvis de Societate poterunt quocumque magis expedire iudicabunt’ ([618]). Et Declar. [620] pressius declarat Praepositum Gen. posse obire hoc munus suos mittendi per inferiores praepositos (provinciales, rectores, etc.).

Ergo R. P. potestatem et auctoritatem quam vi quarti voti solus habet super professos 4 vot., delegat habitualiter Patri nostro Generali (qui hanc subdelegare potest). Quapropter Pr. Gen. his in missionibus et circa apostolatam missionarium professorum 4 vot. potest ordinare et dicitur P. Generalis his in rebus quoad professos 4 vot. agere potestate ordinaria vicaria:

— potestas est ordinaria, quia inhaeret muneri Pr. Gen. atque ipso iure pontificio (Paulis III 1542–1543: ad fideles; 1549: ad infideles) adnexa est officio;

— potestas haec est vicaria, non propria quin exercetur nomine alterius scil. R. Pontificis” (DELCHARD, p. 41).

If the Fr. General gives a mission to any professed of four vows he does it by virtue of his vicarious power, and so, in that matter there is no conflict with all the things we have said to this point.³⁶

Unfortunately, Delchard's inelegant split in the matter of obedience creates more problems than it attempts to solve, and, frankly, the logic of his argument does not hold up. First, it is unclear upon what basis Delchard proposes that the professed do not give in their *third* vow the fullness of their obedience to the internal superior of the Society. Second, it is *not* clear that the professed give *all* the obedience "circa missiones" to the pope. And, third, while it may be laudable, and in the context of his argument even comprehensible for Delchard to regard the pope in this matter as the "internal superior of the Society," no pope and no superior general has ever claimed such, nor is it likely that one ever would. These issues will be treated presently and in turn.

Almost thirty years later, Gerhartz brings forward much the same position.³⁷ After a clear and excellent summary of the history of the issue, he says:

The professed vow in their fourth vow their obedience 'circa missiones,' that is their 'apostolic obedience,' expressly and directly to the pope. Directly, that means without the intervention of the religious superior and not only inclusive in the common vow of obedience in virtue of which the religious are obliged to obey also the pope (*CIC* 83, c. 590). [...] But the professed vow their 'apostolic obedience' not only directly, but also exclusively to the pope and not also to the religious superior. [...] In their third vow of obedience, however, the professed vow to their religious superior the 'inner obedience' (in distinction from 'apostolic obedience'), that is the obedience in regard to the way of proceeding or manner of life or—as the founding fathers said—the obedience in

³⁶ "Professus 4 vot. non vovet nec dat in tertio voto suo totam amplitudinem suae oboedientiae Superiori interno Societatis; similiter in quarto voto non vovet nec dat 'specialiter' totam amplitudinem suae oboedientiae religiosae Romano Pontifici.

– Relate ad R.P. et quidem ad solum R.P., idque immediate (i.e., non mediante Pr. Gen.) professus 4 votorum (atque his solus) promittit 'specialiter' R^o Pontifici oboedientiam eamque totam circa 'missiones' i.e., oboedientiam apostolico-missionalem circa ministeria Societatis propria.

Ergo, per se, in his solis rebus apostolicis R. Pontifex professum vi voti specialis mittere vel ei aliquid praecipere potest, ita ut sub hoc aspectu R. Pontifex dici possit Superior internus nostrae Societatis.

Si P. Gen. mandat missionem professo 4 vot., id agit vi suae potestatis vicariae. Hac in re nulla contrarietas cum iis quae prius dicta sunt" (DELCHARD, pp. 41-42).

³⁷ Gerhartz's opinion carries much influence not only because he is a canonist who wrote his dissertation on "fourth vows," but especially because of the position he held for several years as the secretary of the Society.

regard to 'our particular things and contingencies, which are innumerable and for which the pope could not care, and if he could, he should not care.' [...]

On the contrary, the coadjutors of the Society vow in their vow of obedience all the obedience, the 'apostolic' and the 'inner obedience,' to their religious superior, and that 'according to the *Constitutions*,' and to the pope in virtue of *CIC* 83, c. 590.³⁸

With regard to how it is that the superior general can send and recall professed members on missions, Gerhartz continues:

Earlier we said, the professed fathers vow their 'apostolic obedience' exclusively to the pope and not also to the religious superior. Does that mean that only the pope and not also the religious superior can send on a mission? No, also the superior general can do this. The *Constitutions* speak about this in a special Chapter of part seven: 'the missions received from the superior of the Society.' They say clearly that the 'superior general will also have complete authority over the missions' ([749]). But in virtue of what power or authority can he do that? The *Constitutions* answer: 'according to the faculty granted by the Sovereign Pontiff' ([618]). This faculty given by the pope confirms once more that the professed vow their 'apostolic obedience' directly, only to the pope. [...].

Naturally the *Constitutions* insist, that in this matter of missions the obedience to the religious superior is subordinate to the obedience to the pope, and that this obedience to the religious superior has to seek that 'always this is done which is conducive to the greater service of our Lord and the universal good' ([618, also 603, 607f, 633, 749]). In these missions the religious superior is understood as a mediator between [the] pope and the individual Jesuit ([607f, also 552]).³⁹

With all due respect to Gerhartz, it just does not "ring true" that the superior general should be relegated to the role of a "mediator" between the pope and the individual Jesuit. The position offered by Delchard and Gerhartz would seem to call into question the necessary and proper autonomy, if not the very nature of a religious institute itself, as well as the conventional and legitimate authority of its supreme moderator. Contrary to Delchard's earlier declaration, there are several, if not many points of conflict in the foregoing arguments which must be put to rest.

³⁸ G. GERHARTZ, "The Fourth Vow in Respect of Missions and its Influence on the Constitutions: an Historico-Canonical Inquiry," (= GERHARTZ, "The Fourth Vow"), a paper first delivered orally ca. 1992, and subsequently prepared for publication in English by *SIS* (formerly *CIS*), Rome, 1993, pp. 21-22, used by permission of the author and the *SIS*. A Spanish translation has since been published: "El cuarto voto y su influencia en las Constituciones de la Compañía de Jesús: Investigación histórico-canónica," in *Manresa*, 66 (1994), pp 217-240.

³⁹ GERHARTZ, "The Fourth Vow," p. 22.

B. The New Legal Context: The Founding of the Society.

In the *Spiritual Exercises*, "Rules for the Discernment of Spirits," there is a wonderful axiom which often is referred to as the principle of fallacious reasonings. In short, it proposes that if one recognizes that the conclusions of a process are in error, it is profitable to consider the starting point, and each step along the way, to uncover the flaw which led to the erroneous end.⁴⁰ The juridical situation described above by Delchard and Gerhartz more closely conforms to that which existed in 1538, when the pope first accepted the offering which the companions made of themselves to undertake apostolic missions, than it does to the circumstances after 1550. In 1538 they were a group of "friends in the Lord" who were acting in fulfillment of their Montmartre vows;⁴¹ they were not a religious institute; and while Ignatius was held in a certain esteem, the companions made the offer directly to the pope, who when he accepted it became, after Christ, their direct and only superior. In that situation if the pope were to approach Ignatius to request that he send one of the companions on an apostolic mission, Ignatius certainly would have acted with vicarious power, in the name of the pope. However, something for which neither Delchard nor Gerhartz adequately give account is the constitutive change in the juridical state which occurred with the founding of the religious institute and the effects of the vows professed therein, including the vow of obedience to one of their own number.

⁴⁰ "When the enemy of human nature has been perceived and recognized by his serpent's tail and the evil end to which he is leading, it then becomes profitable for the person whom he has tempted in this way to examine the whole train of the good thoughts which the evil spirit brought to the soul; that is, how they began, and then little by little the evil spirit endeavoured to bring the soul down from the sweetness and spiritual joy in which it had been, and finally brought it to his own evil intention. The purpose is that through this experience, now recognized and noted, the soul may guard itself in the future against these characteristic snares" [*SpEx*, 334].

⁴¹ In this context it is interesting to note that *CIC* 83, c. 1198, which is identical to *CIC* 17, c. 1315 reads: "Vows made before religious profession are suspended as long as the person who makes the vow remains in a religious institute." A note on this canon tells us that: "It refers to a suspension *a iure*, not to a commutation: the dispensation from religious vows, therefore, means that the obligation of the previous vows comes back into force. It would be a different matter if, in the case of private vows, the person making them intended to commute them for the religious profession, provided that the latter implies an equal or greater good than the former (cf. c. 1191 [sic 1197])," (*The Code of Canon Law Annotated* (= *The Annotated Code*), E. CAPARROS, M. THÉRIAULT, J. THORN, eds, Montréal, Wilson & Lafleur Ltée., 1993, p. 747, commentary on c. 1198). In this case it could probably be safely assumed that the Montmartre vows were commuted to the mission vow.

1. The Vow Formula

Is the obedience “circa missiones” of the professed of the Society indeed made immediately, directly and “[...] exclusively to the pope and not also to the religious superior,” in the way that Delchard and Gerhartz suggest? A response to this question is to be found within the the proper law of the Society, properly interpreted in light of the universal law of the Church. In the *Constitutions* the vow formula itself reads:

I, N. make profession, and I promise to Almighty God, in the presence of His Virgin Mother, the whole heavenly court, and all those here present, and to you, Reverend Father [N.], superior general of the Society of Jesus, and the one holding the place of God, and to your successors (or, to you, Reverend Father [N.], representing the superior general of the Society of Jesus and his successors and holding the place of God), perpetual poverty, chastity, and obedience; and, in conformity with it, special care for the instruction of children, according to the manner of living contained in the apostolic letters of the Society of Jesus and in its *Constitutions*.

I further promise a special obedience to the Sovereign Pontiff in regard to the missions, according to the same apostolic letters and the *Constitutions*. Rome, or elsewhere, on such a day, month, year, and in such a church [527].

It is immediately to be noticed that the vow formula contains the principle that the vows are to be understood according to the manner of living contained in the apostolic letters and the *Constitutions* of the institute. This is not a surprise since the public pronouncement of the vows, deliberately and freely given to God and accepted in the name of the Church by a lawful superior, forms the basis of the “quasi pactum” between the one making vows and the institute, which acts in the name of the Church. This act brings into being obligations of justice on the part of both the *vovendi* and the institute, obligations which the virtue of religion requires be fulfilled.⁴² These obligations are not juridically unlimited, as was observed in Chapter Three, but are defined by the universal law and by the documents of the institute, according to which the vows are understood.

⁴² See *CIC* 83, cc. 1191-1198.

a. The Third Vow in the Vow Formula

In the first paragraph of the vow formula, which contains the three, traditional evangelical vows of religion, it is generally to be presumed that, as in all institutes, the vow of obedience includes the fullness or all the amplitude of religious obedience, and that the supreme moderator has authority over the members, including the authority to send them on missions. However, the *Constitutions*, [547], when addressing the third vow, exhort all the members of the institute to apply their energies “[...] with very special care to the *virtue* of obedience shown first to the Sovereign Pontiff and then to the superiors of the Society.” As was pointed out in Chapter Three, this dedication of the institute to the *virtue* of obedience so as “[...] not to miss any point of *perfection* which we can with God’s grace attain in the observance of the *Constitutions* [...],” is not a statement pertaining to the strict *obligation* of the third vow, but rather to the *virtue* of the vow—to its devotional aspect.

It is possible, however, that one may postulate that this statement, “[...] shown first to the Sovereign Pontiff [...],” though only devotional, may still be binding in some way. For instance, J. Sheets addressed the issue of the obligation of a vow this way:

A vow is in fact a promise, freely given, to take on a limitation which, through the Holy Spirit, can become a creative limitation. There are two kinds of limitation which a person can freely make: limitation in the use of things (for example, the vow of poverty), and limitation in relationship to people (marriage vows, religious vows of celibacy, obedience). The fourth vow comes under the latter type.

In vows that have to do with relationships among persons there are two types of limits, and hence two types of obligation. There are limits as boundaries, which can be localized and expressed legally. There are also limits that are horizons. These draw one forth to an ever expanding realization of one’s commitment. These horizons cannot be localized, but they belong as much to the obligation of the vow as the boundaries which can be localized by law. The vow is lived out within the polarities of these two different kinds of limits: those which one cannot cross without violating the vow, and those which constantly draw me out to greater and greater authenticity.⁴³

⁴³ J. SHEETS, “The Fourth Vow of the Jesuits,” (= SHEETS), in *RJR*, 42 (1983), pp. 518-529.

While Sheets' point is well taken, those horizons which cannot be localized cannot be enforced and cannot be demanded. They may be exhorted, and, while they may constitute a spiritual responsibility or duty, it cannot be said that they are of the same nature as the matter of enforceable strict juridical obligation. As O'Malley says: "the symbolic character of a vow, as an expression of a religious ideal, should be expansive, but the proper object of a vow must, by the nature of the case be clearly localized, as we see exemplified in the varieties of the practice of the vow of poverty in different religious institutes."⁴⁴

In recent years the Society had the experience of an interesting case which relates to this specific point. On 7 May 1965, Pope Paul VI in an address to the Thirty-First General Congregation said:

It is the special characteristic of the Society of Jesus to be the champion of the Church and holy religion in adversity. To it we ask the service of making a stout, united stand against atheism, under the leadership, and with the help of St. Michael, prince of the heavenly host [...]. It is especially recommended to Father General that [...] he direct the entire apostolate of the Society in carrying out that mission as effectively as possible.⁴⁵

And later, on 3 December 1974, in his address to the members of the Thirty-Second General Congregation, he said:

On the occasion of the previous Congregation, we entrusted to you, as a modern expression of your vow of obedience to the pope (*AAS*, 57 (1965), p. 514; 58 (1966), p. 1117), the task of confronting atheism.⁴⁶

What exactly the pope may have meant by "[...] as a modern expression of your vow of obedience to the pope [...]" is of interest here. The pope's statement indicates that he perceived a connection between his request to the Society to work against atheism and the fourth

⁴⁴ O'MALLEY, "The Fourth Vow," pp. 38-39.

⁴⁵ PAUL VI, *Acta Apostolicae Sedis* (AAS), *Sincero animo*, 57 (1965), pp. 514-15; *Voluimus*, 58 (1966), pp. 1172-1178; *Acta Romana* (AR), 14 (1967), pp. 998-999.

⁴⁶ *GC 32 SJ, Documents of the Thirty-Second General Congregation of the Society of Jesus*, Indian Edition, Anand Press, 1976, p. 298, emphasis mine.

vow. As O'Malley points out, "The Congregation also saw a connection, and on one occasion actually referred to the *munus* as a *missio*. The Thirty-Second Congregation did the same."⁴⁷ While the commission was not stated in the classical form of a command under holy obedience,⁴⁸ the Society generally understood and treated it as a "mission" from the pope. It would be inappropriate to attempt to draw from this circumstance any decisive conclusions regarding a definitive interpretation of the fourth vow; however, several questions and observations may be brought forward. The pope made the request to "the Society of Jesus," not only nor specifically to the professed members therein, and later, he recommended that "[...] the entire apostolate of the Society [...]" be directed to carry it out. There are at least two possible interpretations. In the formula of first vows there is a promise: "[...] and I promise that I will enter that same Society [...]" [540] (i.e., with final vows, or definitive incorporation). It may be that the pope was presuming that the Society consisted only of the professed members, as was understood only during the very early developmental years, and that his request was, therefore, directed towards only the professed. But this seems to be unlikely. Especially since, even if those not yet finally and definitively incorporated into the Society are not intended in the pope's request, coadjutors who have pronounced final vows are certainly members of the Society. Also, even those in first vows are vitally involved in the apostolate of the Society.⁴⁹

⁴⁷ O'MALLEY, "The Fourth Vow," p. 39. O'MALLEY goes on to say, "But these sources are circumspect in their manner of speaking, and we should be circumspect, too, in 'developing' them beyond what they seem to intend. The authors of papal documents know their Latin well and are perfectly capable of saying what they mean, as well as of leaving texts ambiguous when it is prudent to do so. It seems clear, moreover, that the two Congregations did not intend to give any general and definitive interpretation of the vow when they used the term *missio*" (ibid., p. 39).

⁴⁸ In Chapter Three it was pointed out that a command under obedience, which requires strict observance, has a formal structure.

⁴⁹ An interesting study was conducted by D. A. BROWN, *The Origins of the Grades in the Society of Jesus, 1540-1550*, Excerpta ex dissertatione ad Lauream in Facultate Iuris Canonici, PUG, Roma, 1971, 121 p. In his thesis he asks, "whether the professed priest in the Society of Jesus and the coadjutor priest in the same Society, are in fact and even in theory and law (*de jure*) different, diverse, 'graded' " (ibid., p. 7). He says: "Hence, we begin to see how the two grades, the two diverse vocations, that of professed and non-professed, that is, of the professed Society and the coadjutor of the professed Society, each in their own way serve the one and same body. Through both, the Body can react through any one of its members with the best possible work-potential. No talent is wasted, no formation and training will

A more probable interpretation would be that the entire Society stands in a "special" relationship to the pope. Gerhartz, in his thesis, said that a fourth vow is "[...] a direct expression of the special end or goal of a particular religious order (*eigentliche Sondergelübde*)."⁵⁰ There is no doubt that "mission" is at the core of the essential nature of the Society's self-understanding, and that the Society's understanding of mission has a decisive effect on the choice of apostolic undertakings. One who pronounces the third vow in the Society promises to live it out according to the manner of life described in the Society's documents. Part of that manner of life includes participation in the apostolate of the Society which itself is determined, at least in part, by a special relationship with the pope and a willingness to be of service to the Apostolic See as well as to the Church. The simplest explanation of the pope's request would be that in this circumstance the Holy See wishes to call upon that willingness for a special task.⁵⁰ For the professed this willingness is expressed through the fourth vow; for others it is expressed through the third vow "[...] shown first to the Sovereign Pontiff [...]," which we have referred to as that which falls under the "spirit of the vow" or pertains to the "virtue" of the vow of obedience, what O'Malley calls the "symbolic character" of the vow. Thus, it can be said that those in the Society who have not pronounced the fourth vow have at least a spiritual obligation by virtue of their third vow to live it out according to the "spirit" of the fourth vow, at least insofar as they participate in the "[...] entire apostolate of the Society," which, in large part, is determined by the exigencies of the fourth vow. The pope's words, "[...] as a modern expression of your vow of obedience to the pope [...]," may be interpreted to mean that he recognizes that his special relationship is not only with the professed who are bound by the strict juridical obligation incurred through the *fourth* vow, but also, with the entire body of the Society through the

be wasted. The Body will react to all its works through a worker and work-potential (which is possessed and employed accumulatively by the Body, distributively by the member); the worker will be *ad hoc* a professed member-worker (with corresponding work-potential). For, the worker will be either a professed with the fourth vow, or be able to work *as if* he were professed. The coadjutors observe the fourth vow in their own way, without having to take it" (*ibid.*, pp. 82-83).

⁵⁰ This is the interpretation suggested by O'MALLEY, "The Fourth Vow," p. 39.

spiritual obligation which comes into effect through the *third* vow. This view is entirely consistent with the Society's understanding that all members belong to the same body, share the same spirit and the same apostolate.

But even such an obligation which exists by virtue of the third vow, could no more have the effect of removing or restricting the legitimate power of the supreme moderator within the institute than does the present canon 590 for the superiors general of other religious institutes in the Church. For in such matters, a specific exception notwithstanding,⁵¹ the universal law takes precedence over proper law. Canon 590 says:

§1. Institutes of consecrated life, inasmuch as they are dedicated in a special way to the service of God and of the entire Church, are subject to the supreme authority of this same Church in a special manner. §2. Individual members are also bound to obey the Supreme Pontiff as their highest superior by reason of the sacred bond of obedience.⁵²

A commentary on this canon points out that:

Neither canonical exemption, nor the fact of belonging to an institute of pontifical right or diocesan right, are circumstances which cancel the condition of the *faithful*, whether clerical or lay, possessed by each member of an institute. On the basis of this condition, it naturally follows that the members of institutes of any kind are subject to the hierarchical authorities of the Church, like the rest of the faithful. As religious or members of a secular institute, however, they have their own internal order and hierarchy, to which they owe obedience by virtue of their vows or of some other sacred bond.⁵³

Earlier, the same note addresses the relationship between the Holy See and religious institutes of pontifical right, of which the Society is one:

In the case of institutes of pontifical right, the immediate and exclusive external authority devolves upon the Holy See, which exercises it through

⁵¹ Such an exception is the Society's approved practice of internal forum government contrary to the norms of c. 630 §5.

⁵² “§1. Instituta vitae consecratae, utpote ad Dei totiusque Ecclesiae servitium speciali modo dicata, supremac eiusdem auctoritati peculiari ratione subduntur. §2. Singuli sodales Summo Pontifici, tanquam supremo eorum Superiori, etiam ratione sacri vinculi oboedientiae parere tenentur” (CIC 83, c. 590).

⁵³ *The Annotated Code*, p. 418, commentary on cc. 589-596, 3).

different dicasteries and, in particular, through the Cong. for Institutes of Consecrated Life and for Societies of Apostolic Life (*PB* 105-111). This competence of the Holy See concerns only the internal governance and the discipline proper to the institutes. [...] This power is external, however, and must not be confused with the internal power of the superiors of the institutes (called “dominative” in the previous legislation) or with the internal power of governance (cf. c. 596).⁵⁴

The example presented, the mission from the pope to combat atheism, is consistent with the commentary’s interpretation of canon 590 §2, in that the pope makes the request that the *general* direct the apostolates of the Society, leaving the internal power of governance to the superior general. Even given the special relationship between the Society and the Apostolic See, there is no reason to be found in the first paragraph of the vow formula to presume that religious obedience “in all its amplitude” is not to be given over to the superior general.

b. The Fourth Vow in the Vow Formula

The obedience in the second paragraph of the vow formula is identified as “a special obedience to the Sovereign Pontiff in regard to the missions.” The formula itself begins with, “I further promise a special obedience [...],” a phrase which means: in addition to, or over and above regular evangelical obedience, I promise a “special” obedience. The formula *does not* indicate that the special obedience is made directly or exclusively to the pope and *not* also to the superior general. In fact, as was mentioned earlier, the “vow to the pope” is to be understood elliptically for, like all vows made in a religious institute, this vow is made to God. As we saw in Chapter Three, a Jesuit by professing it does not relinquish his religious state, his membership in the institute, nor his participation within nor his obligations towards the ordinary government of the Society. In the vow formula, it is the superior general or his representative, and not the pope, who receives the vows and who holds the place of God, to Whom the vows are made. Also, the wording of the vow formula itself, “[...] according to the same apostolic letters and

⁵⁴ *The Annotated Code*, p. 417 commentary on cc. 589-596, 2).

the *Constitutions* [...],” establishes that the mission vow, if not mediated by the religious superior, is at least circumscribed by the documents of the institute—specifically, by the limitations which these documents place upon the vow, especially in Part VII of the *Constitutions*.

However, the vow is “[...] a special obedience to the Sovereign Pontiff in regard to the missions [...].” Delchard and Gerhartz conclude that because obedience “circa missiones” is made to the pope, therefore the fullness of obedience is not given to the superior general, not even in the third vow. To support his argument we earlier saw Gerhartz make a distinction between “inner obedience” and “apostolic obedience.” He defined “inner obedience” as:

[...] the obedience in regard to the way of proceeding or manner of life or—as the founding fathers said—the obedience in regard to ‘our particular things and contingencies, which are innumerable and for which the pope could not care, and if he could, he should not care.’⁵⁵

In fairness, it must be pointed out that Gerhartz is quoting from the *Deliberations* [7], where the companions were prayerfully engaged in a spiritual “brain-storming” exercise designed to determine *all* the pros and cons, advantages and disadvantages, connected to the question should they vow obedience to one of their own number. By their own admission, some of the examples in the same list from which Gerhartz pulled this quote were characterized as introducing “[...] the absurd and impossible [...],” such as running naked through the streets in the name of holy obedience, as an example of heroic virtue.⁵⁶ In this exercise the companions most certainly were not undertaking to *define* nor set the limits of obedience. The document itself indicates that the more weighty reasons were taken into consideration when they made their decision, but it does not identify which reasons they considered to be more weighty. The point is that this quotation used by Gerhartz to support the juridical limitation of the content and extension of the third vow to “‘inner obedience’ (in distinction from ‘apostolic obedience’)” has nothing more nor less to

⁵⁵ See the *Deliberations* in Appendix, V.

⁵⁶ The *Deliberations*, [7], found in Appendix V.

do with the founding fathers' understanding of religious obedience than does running naked through the streets!

Gerhartz also says:

It is not true that the third vow binds the professed of the Society to obey the pope 'circa missiones,' because they make their profession 'iuxta formam vivendi in litteris apostolicis Societatis Iesu et in eius *Constitutionibus* contentam,' viz. according to the *Formula of the Institute* and the *Constitutions*. But the *Formula of the Institute* and the *Constitutions* make it quite clear that the 'missions' of the professed are reserved to the pope; the general cannot 'send' a professed except in place of the pope [82], with delegation from the pope. The obedience that the professed owes to his superiors and to the pope in virtue of his third vow is only of the kind that someone has called 'corporate' and excludes the 'missions,' whereas the fourth vow is meant to obey the pope only 'circa missiones.'⁵⁷

It is interesting that Gerhartz makes no reference to what the *Constitutions* say regarding the obedience of the third vow to be shown *first* to the pope. According to his own line of reasoning one could presume that, even though the coadjutors do not make an express vow regarding obedience to the pope, the statement in the *Constitutions* should allow the pope as much juridical authority over the coadjutors as Gerhartz claims he has over the professed. But this is not commonly understood to be the case, and even if it were, since coadjutors do not profess the vow, their obligation would not include the specifics—to go on foot, without provisions, etc.

However, Gerhartz does claim that *all* missions of the professed are reserved to the pope. To attempt to prove his point, Gerhartz again employs a questionable methodology whereby constitutions which specifically address the fourth vow are applied and interpreted so as to limit the juridical content and extension of the third vow. Canon 18 reads: "Laws which establish a penalty or restrict the free exercise of rights or which contain an exception to the law are subject

⁵⁷ J. GERHARTZ, Private notes written on the occasion of GC 31. See DE ALDAMA, *Missioning*, pp. 35–40. For use of the notion "corporate obedience" cf. L. MENDIZABAL: "Hay que distinguir dos momentos en la obediencia de la Compañía: el *emisivo* y el *corporativo*, correspondientes a las Partes VII y VIII de las *Constituciones*" ("Sentido íntimo de la obediencia ignaciana," in *Manresa*, 37 (1965), p. 67); and J. ITURRIOZ: "Y para orientar el esquema se este escrito, sepa el lector que nos parece descubrir dentro de la Compañía, en cuanto a la obediencia se refiere, dos planos o dos modos de ser distintos, que calificaremos, el uno, de *obediencia corporativa*, y de *obediencia misional o apostólica*, el otro" ("Dos líneas de obediencia en la Compañía de Jesús" in *Manresa*, 43 [1971], p. 60).

to a strict interpretation.”⁵⁸ If he wishes to reach his conclusion it would be methodologically more proper to suggest that the fourth vow may in some way limit or restrict the *fullness* of obedience which *has already been professed* to the religious superior in the third vow. However, the pertinent question is: *does* the fourth vow limit or restrict the third vow of the professed or the authority of the superior general?

2. The Authority of the Superior General

In Part IX of the *Constitutions*, entitled: “The Society’s Head, and the Government Descending from Him,” in Chapter 3, “The Superior General’s Authority Over the Society and His Functions,” the following is found:

It is judged altogether proper for the good government of the Society that the superior general should have complete authority over it, in order to build it up. This authority (from which the general’s functions also become manifest) is described below [736].

The sentiment articulated in this constitution is not only reasonable, but it is astonishingly similar to one of the desires expressed by the Second Vatican Council and published by the Synod of Bishops as the ten fundamental principles guiding the revision of the Code of Canon Law. The fifth stated that the principle of subsidiarity should be properly applied, that is, what can be done effectively at lower level of authority ought not to be reserved to a higher authority.⁵⁹ Earlier it was pointed out that part of the description of the authority of the general includes the following:

The same general will also have complete authority over the missions, but in no case may he obstruct missions of the Apostolic See, as is stated in Part VII [618]. From among those who are under his obedience he may send all, professed or not professed, to any regions of the world, for the time which seems good to him, whether it is definite or indefinite, in order to exercise any of the

⁵⁸ “Leges quae poenam statuunt aut liberum iurium exercitium coarctant aut exceptionem a lege continent, strictae subsunt interpretationi” (*CIC 83*, c. 18).

⁵⁹ The ten principles guiding the revision of the Code can be found in *Communicationes*, 1 (1969), pp. 77-100.

means which the Society uses to aid its fellowmen. Similarly, he may recall those sent acting in everything as he judges to be conducive to the greater glory of God our Lord [...] [749].

The first phrase of [749], which says that the “general will also have complete authority over the missions [...],” is a clear and direct statement. It is nuanced in that the general may not “[...] obstruct missions of the Apostolic See [...],” but this papal clause is yet another positive expression of the Society’s willingness and desire to be of service to the Apostolic See and to the Church. In the mind of Ignatius, given his understanding of authority and his world-view, to receive missions from the “Vicar of Christ” or to have them confirmed by the pope as the “Universal Pastor,” need in no way compromise the “complete authority” which the constitution states the general does hold over the missions. Rather, “papal approval of their order opened to the Jesuits the world as their vineyard, and handed them, in effect, a charter that assured their freedom to pursue their pastoral goals with minimum limitation imposed by local bishops and the Catholic princes.”⁶⁰

The above constitution goes on to say: “From among those who are under his obedience he may send all, professed or not professed [...].” One may allege that the phrase “from those who are under his obedience” does not include the professed of four vows who are *not* under the obedience to the general but under obedience to the pope. But it was pointed out earlier that the *Constitutions* ordinarily use the word “professed” to mean those who have made solemn vows. There are only two grades of Jesuits who make solemn vows: the professed of four vows; and those who make solemn profession of three vows, but not the mission vow. It is so rare and unusual for this latter to occur that it would be unreasonable to presume that the constitution which refers to the general’s authority would be referring to the “professed of three vows” without specifically identifying them as such. Thus, it is reasonable to conclude that the constitution includes the qualifying phrase, “[...] professed or not professed [...]” to indicate

⁶⁰ O’MALLEY, “The Fourth Vow,” p. 44.

specifically that the professed of four vows *are* under obedience “circa missiones” to the superior general. Also, Chapter 2 of Part VII, acknowledged especially by Gerhartz, explicitly addresses “The Missions Received From the Superior of the Society.” There is no doubt that the professed of four vows are subject to the obedience to the superior general. The question is, what is the source of his authority?

a. The Faculty to Mission

Delchard and Gerhartz say that the superior general may act “circa missiones” only in the name of the pope, according to the faculty which was granted at the request of Ignatius. While we have already seen the faculty mentioned several times, the most explicit references occur in the following two constitutions:

[...] the superiors of the Society, according to the faculty granted by the Sovereign Pontiff, will have authority to send any of the Society’s members whomsoever to whatsoever place these superiors think it more expedient to send them [...], [618].

Elsewhere we find:

[...] as they travel through various regions of the world, according to what the Supreme Vicar of Christ our Lord may assign to them, or, in his place, the one who will find himself superior of the Society [...], [82].

The question must be asked, how was this faculty understood by the first Jesuits? We recall that historically the issue came forward as a result of a series of questions raised by Polanco during the crafting of the *Constitutions*. First, there was the question regarding the length of a papal mission, which was resolved to be three months; second, Ignatius clearly determined that a Jesuit, while carrying out a papal mission, was subject to the ordinary government of the Society; and third, there was the canonical split-decision regarding whether the general had the authority to recall a professed Jesuit from a papal mission. The faculty was requested to solve this doubt, and to ensure that the superior general would have the requisite authority to carry out his office.

The historical precedents and circumstances of the day must also be recalled. Polanco often used the documents of other religious institutes to assist him in his work on the *Constitutions*. Prior to the founding of the Society, those groups with special bonds of obedience to the pope, in every case, were subject directly to the pope and not to diocesan ordinaries, and this for at least three reasons. First, due to their travels, the knightly orders (the first to have such bonds) passed through many dioceses, and, in the Holy Land, where much of their labour took them, there were no diocesan ordinaries to whom they could be subject. Second, the members came to an order from many dioceses. Third, “[...] they were the ‘Pope’s Men’ in carrying out the Holy War.”⁶¹ And while the mendicants had already made significant contributions to the development of “provinces” of an institute, the understanding of religious life was still heavily biased in favour of a monastic model, which included the base of a stable residence.

It must also be acknowledged that, as Delchard points out:

[...] difficulty comes from the fact that the *Formula* and the *Constitutions* refer to the state of things in the beginning of the Society. It must be remembered that things changed with the growth of the numbers in the Society, their dispersement all over the world, the more complex structures of government, the creation of coadjutors and the introduction of stable ministry because of the houses and especially the colleges.⁶²

Among these complex structures of government which changed were the understanding of the authority and the role of the superior general “circa missiones,” the relationship of the superior general with the pope, and the praxis of the Holy See regarding the pope’s participation in the

⁶¹ SHANAHAN, p. 18.

⁶² “Difficultates definitionis oriuntur exinde quod *Formula* et *Constitutiones* referuntur ad statum rerum in Societatis initiis. Atque ratio habenda est incrementi numerici Societatis, extensionis et dispersionis ubique terrarum, structurae gubernii, quae magis complexa facta est, creati gradus coadiutorum, ministeriorum stabilium quae mox assumpta sunt in domibus et maxime in collegiis” (DELCHARD, p. 40). This is also one of O’Malley’s theses, “[...] that the Society in 1565 was different in important respects from what it was in 1540” (O’MALLEY, *The First Jesuits*, p. 14). Some factors he notes which account for this change include the effects of the humanist movement, the growth of the Society, the dispersement of Jesuits around the world and the responsibility to maintain permanent institutions with continuity of personnel. He says that the schools “[...] became a part of the Jesuits’ self-definition,” marking “[...] a chronological as well as cultural landmark” for the early Society (ibid. pp. 14–15).

missions of the Society.⁶³ One interpretation of the early documents of the Society indicates that the original intent of the fourth vow was to have the pope directly hold the responsibility for the missions of the professed—that *he* would choose a particular individual for a specific task and command him under the obedience of the fourth vow to carry out a mission.⁶⁴ However, the rapid growth of the numbers of the Society and the sheer number of ministries involved soon made it impractical, if not impossible, to expect the pope to intervene directly, and in every case. In fact, a case of the pope intervening directly to give a specific mission to a specific Jesuit cannot be found since the founding years of the Society. The pope himself seems to have acknowledged this shift in the use and practice of the fourth vow when he asked the Society to fight atheism and used the phrase: “[...] as a modern expression of your vow of obedience to the pope [...].” In the ordinary course of events, if the pope wishes to give a mission to the Society he contacts the superior general, informs him of the mission, and leaves the internal administration to him.⁶⁵ “The interpretation of the law is a delicate intellectual operation

⁶³ See SHANAHAN, p. 56

⁶⁴ Many examples of this are evident in the early Society: In 1549, Jay, Salmeron and Canisius were sent by the pope to Germany; Lainez was sent on the pope's own initiative to attend the German Diet; Broet and Salmeron were sent to Ireland in 1541 as papal nuncios; Salmeron was sent to Diets in Germany and Poland; Lainez, Salmeron and Faber were sent to the Council of Trent as the pope's theologians; Canisius, Olave, Lippomani and Nadal were sent by the pope to Diets in Viola and Bobadilla to one in Poland, etc. More recent examples cannot be found. It is said, however, that the popular novel, *The Jesuit*, is based on the fact that between the World Wars, the pope asked a Jesuit (Michel D'Herbigny), the young Rector of the Orientalis in Rome, to go into Russia as a bishop. The Jesuit was consecrated by the pope in a secret ceremony, in the presence of the superior general, and the new bishop entered Russia to serve the underground church. Reportedly, the mission was a dismal failure, but the Jesuit escaped Russia unlike many of those with whom he there had contact. Pope Pius XI accepted the renunciation of his miter on 27 June 1937. He spent the last twenty years of his life in two novitiates in France, “[...] in religious contemplations—and with a butterfly collection” (H. STEHLE, *Eastern Politics of the Vatican* [1981], Athens, Ohio Univ. Press, 1981, p. 176).

⁶⁵ J. Swain who governed the Society as the vicar general during the long illness of Fr. Jansens, then the superior general, related a representative example of the ordinary way in which the fourth vow has been invoked by the pope. The example concerns the events which led to the Upper Canada Province's opening of a school in Bhutan. The king of Bhutan asked the Holy See to have the Jesuits open a school. The pope made the request to Swain who promised to do a feasibility study. Several months later, the pope asked Fr. Swain for the results of the study. Swain indicated that, primarily because of Bhutan's laws forbidding any proselytizing, it was not advisable that the Jesuits undertake the mission. The pope requested another feasibility study, which was undertaken, and which produced similar, if not stronger, results. The king talked again to the pope and again requested the school. The pope asked Swain to open the school, and Swain suggested that, because of the negative recommendations of the feasibility studies, we should decline. The pope then ordered Swain under the fourth vow to open the school. Swain saw that the English Canadian Jesuits already had

intended to determine its meaning with a view to its suitable application.”⁶⁶ When interpreting a law, the long standing application and praxis of the Roman Curia is no small matter, and should not be taken lightly.⁶⁷ However, the presentations and arguments of Delchard and Gerhartz address and interpret a praxis which virtually has not existed for centuries.

The early Jesuits were cognizant, however, even before the founding of the institute, that the nature and scope of the Society would push forward the juridical boundaries of religious law which were in place at the time. This is evidenced in that at the *Deliberations of the First Fathers*, one fear recorded as an objection against the profession of obedience to one of their own number was the following:

If we wish to live under obedience, perhaps we will be obliged by the Supreme Pontiff to live under some already established and constituted rule. If this happens, since it might not give us the opportunity and scope to work for the salvation of souls, which is our unique purpose after concern for our own souls, all of our desires, which in our judgement we have received from the Lord our God, would be frustrated. [7].

In essence, they understood that they were embarking on a new enterprise which would require the development of new structures. The Church, in approving the founding of the Society without insisting that it adopt one of the already established rules, consented and actually participated in the development of these new structures. It was the attitude and approach of the first Jesuits that to remain faithful to the vocation they believed to have received from God, the practice and scope

missionaries located in Darjeeling, India, and communicated the responsibility for the new school to the provincial of Upper Canada who sent men from India to open the school in Bhutan. A popular history of the Jesuits' work in Bhutan, specifically of the life of William Mackey who had primary responsibility for that work, has just been published by H. SOLVERSON, *The Jesuit and the Dragon: The Life of Father William Mackey in the Himalayan Kingdom of Bhutan*, Montreal—Toronto—Paris, Robert Davies Pub., 1995, 299 p.

⁶⁶ *The Annotated Code*, p. 90, commentary on c. 16.

⁶⁷ See *CIC 83*, c. 19.

of their apostolic ministries and missions should define the juridical reality rather than the other way around.⁶⁸ As O'Malley points out:

Any discussion of that vow that begins with Ignatius' esteem for the papacy instead of with the apostolic aims of the first companions has got things backwards at the outset. [...] What came first was experience of ministry and a desire to exercise it in the most fruitful way possible. The first companions only then decided on a vow *to that effect*, that is, on a vow 'to go wherever sent to do Christian ministry.'⁶⁹

It is not unusual to find that the principles of law or even the juridical structures of the Church sometimes lag behind accepted praxis.

How then did the first Jesuits understand the mission faculty? As was pointed out, of those first Jesuits, Nadal was the one who best knew the mind of Ignatius, the one who was given the task of the "experimental promulgation" of the *Constitutions* at a time when the blueprints or precedents were being developed.

In an order without tradition, he contextualized and interpreted a text that otherwise had no firm hermeneutical principles for rendering it viable. He mediated Ignatius to all those members of the Society who had never met Ignatius and, we must assume, had some unclear ideas about the organization they had joined. The documents he left us [...] testify to the meaning of the Jesuit vocation as it was understood by a contemporary and trusted confidant of the founder.⁷⁰

In his commentary on [618] of the *Constitutions* Nadal says:

According to the faculty. We *do not* understand that the generals *do not have in their own right* the power to send for ministries, but we point out two things here, according to the confirmation of Julius III and the faculties of Paul III: first, that the missions belong 'chiefly' to the pope, not by his ordinary right as Universal Pontiff but by privilege, through which he wished us to make the fourth vow as *though* he took special care of our missions; second, that while the

⁶⁸ Earlier references point out several juridical "concessions" that were made to accommodate the Society's self-understanding and way of proceeding. Examples include: the conditional aspect of the first vows; that those in simple vows would be recognized as true religious; that these simple vows in the Society would have, in many ways, the same juridical effects as solemn vows; the power of the general to dispense non-professed from their vows; exemption from choir; etc.

⁶⁹ O'MALLEY, "The Fourth Vow," pp. 44-45. Emphasis is O'Malley's.

⁷⁰ O'MALLEY, "To Travel," p. 3.

general has the ordinary power to send men on missions to heretics and even to the unbelievers, doubts could be raised about this, and a declaration on this point became necessary. This was done by Paul III in the bull '*Licet debitum*' quoted by the constitution.⁷¹

It is not questioned that the general has the *ordinary* power to mission, but that he has the *proper* power to mission. It should be clear from the context of the discussion regarding *faculty* that Nadal was addressing, albeit with imperfect canonical language, the issue which the law would now call *proper* power. Nadal is clear that *he* understood that the superior general did have, *in his own right*, the power to send and recall professed Jesuits on missions. It is also interesting to note his use of the double negative in the first sentence, presumably to draw attention to how strongly he felt about the matter. It is fascinating, and frankly surprising that this issue was addressed so early in the Society's history, and that there are those who insist on keeping the question alive today.

b. The Authority of the Superior General in the *Constitutions*

It has been established that usage and experience caused the structures of the Society to evolve. One result was that more and more responsibility for missions devolved upon the superior general, until the *Constitutions* themselves say: "Then he himself [the superior] will decide about sending or not sending, and about the other circumstances, as he will judge to be more expedient for the greater glory to God" [618]. And again, in the following declaration:

The superior of the Society can more easily and more expeditiously make provision for many places (especially those remote from the Apostolic See), than would be the case if those who need members of the Society must always approach the Sovereign Pontiff [619].

⁷¹ Nadal's commentary on [618] reads: "iuxta Facultatem. Non intelligimus, Praepositos iure suo, qua Generales sunt, non habere facultatem mittendi suos in ministerium, sed duo hic significamus, iuxta diplomata confirmationis Iulii 3. et facultatum Pauli 3; unum est, quod ad Summum Pontificem principaliter pertineant missiones nostrum, non ex iure eius ordinario solum, sed ex privilegio, quo voluit votum 4^{um} nos edere, quasi peculiarem curam susciperet nostrarum missionum Summus Pontifex, alterum est, quod dubitari quum posset, num Generales Praepositi ordinaria potestate possent ad infideles etiam, vel haereticos suos mittere, fuit operae pretium, id explicari diserte, quod Paulus 3. fecit, et hoc loco citat constitutio" (NADAL, *Scholia*, pp. 177-178). Emphasis mine.

And again:

Just as the general can perform the other functions by himself and through persons under him, so too can he perform this one of sending his subjects on missions, by reserving to himself the missions which he thinks should be thus reserved [620].

And again:

The sending of subjects 'to whatsoever place these superiors think it expedient' means either among the faithful, even though it be in the Indies, or among the unbelievers, as in Greece and elsewhere. Where the inhabitants are more exclusively unbelievers, the superior should ponder seriously in the sight of God our Lord whether he ought to send subjects or not, and where, and whom. The part of the subject will always be to accept his appointment joyfully as something from God our Lord [621].

These constitutions are followed by the criteria for the selection of ministries, which also act as guidelines for the entire apostolate of the Society, or as the modalities and thus, further limitations for the application of the fourth vow—the chief being: “the more universal the good is, the more it is divine” [622 d]. As Shanahan points out, “[...] this principle of seeking the universal good is what originally caused Ignatius to set himself and his companions before the pope for his guidance and direction in the vineyard of Christ.”⁷²

Given that the structures evolved, how is the question regarding the “power” of the superior general over the matter of missions to be understood? This faculty or grant was communicated by means of the papal bull, *Licet debitum*, in 1549:

[...] and the General himself can go and can send his men to go [on missions], and recall them, anywhere in the world, even among non-Christians, when he deems it expedient in the Lord.⁷³

Licet debitum was written before the promulgation of the definitive 1550 *Formula of the Institute*, and much before the long and thorough process of reflection and revision that went into the

⁷² SHANAHAN, p. 56.

⁷³ “[...] ac ipsemet Praepositus pro tempore existens ire, et suos, quocumque locorum, etiam inter infideles, cum expedire in Domino iudicabit, mittere et revocare [...] libere et licite valeat” (Paulus III, *Licet debitum*, 1549, Inst. 1, 14a, in VALERO, no. 54, found in Appendix, VI).

writing of the *Constitutions*, both of which, as Delchard mentioned, refer to the state of things at the beginning of the Society. In the circumstances of the day, a papal bull was not an uncommon method of conveying such power to an institute. The faculty conveyed to the superior general became the power of the general in the same way that many other faculties granted by the pope to the institute became the power of the general. Several have been referred to throughout this paper, but perhaps the most fundamental, and one of the first obtained, was the power of the superior general to admit more than sixty members to the institute which he governed.⁷⁴ With its conveyance to the Society through the bull *Licet debitum*, the faculty to mission became part of the corpus of the *proper law* of the Society.⁷⁵ The faculty was originally motivated, not to obtain a power that the general believed he did not have, but, because a doubt could be raised and Ignatius wanted to put the issue to rest.⁷⁶ Historically, the petition to the pope was not precisely for a *delegation* of power, but, it is more properly understood as a request that the Holy See *recognize* the legitimate *postestas* of the supreme moderator of a new and developing religious institute in the Church. And not only a legitimate *postestas*, but a *necessary* one if the superior general were to carry out his mandate. Thus, according to this line of understanding, the supreme moderator can send a man on a mission not only because of the

⁷⁴ Other grants included: the power to admit coadjutors; the recognition of simple vows of the Jesuits as true vows of religion, having the same effects as solemn vows; the special, conditional nature of the vows of the non-professed; the power of the superior general to dismiss non-professed; and, more recently, the faculty granted to the general to dispense from the simple vow of the solemnly professed not to accept ecclesiastical dignities (excepting prelacies).

⁷⁵ See Chapter Two, note 9, for the notion of the "law" of the Society. "The legislator has chosen to call *proper law* the norms to which §§ 3–4 [of c. 587] refer, in order to distinguish it from the *particular law* that proceeds mainly from the particular Churches" (*The Annotated Code*, p. 415, commentary on c. 587).

⁷⁶ This view of things is consistent with Ignatius' way of proceeding in other matters as well. One characteristic example occurred when, against the strong advice of his friends and even members of the company, he tenaciously insisted that an investigation be undertaken and that a formal, written judgement be issued regarding the good name of the Society which had been slandered, its members accused of being heretics, by Mainardi and three of his friends who were influential in the papal curia. The incident is described by J. PADBERG, "Ignatius, the Popes, and Realistic Reverence," (= PADBERG, "Realistic Reverence"), in *SSJ*, 25–3 (1993), pp. 13–18; it is also documented by M. DEL PAIZZO and C. DALMASES, "Il processo sull'ortodossia de S. Ignazio e dei suoi compagni svoltosi a Roma nel 1538," in *AHSJ*, 38 (1960), pp. 431–453; the decision itself can be found in *Fontes documentales de S. Ignatio de Loyola*, C. DALMASES, ed., *MI*, p. 556 ff.; and Ignatius himself writes about it to Isabel Roser, found in *Epplg*, 1, pp. 137–144.

faculty, but even *first* because he is the superior general of an institute specifically erected for mission, with his authority defined both in particular, pontifical law and in the proper law of the Society which was approved by competent authority. Earlier, Delchard made the very same argument, “the proper laws of the Society were approved by the Roman Pontiff after examining the question.”

Because the *Constitutions*, expressed especially in the vow formula, offer a special obedience “circa missiones” to the pope, it is not necessary therefore to conclude that the subject no longer owes obedience “circa missiones” to the superior general. Several important statements reinforce this interpretation: the Council of Trent said that religious “[...] should faithfully observe what belongs to the perfection of their profession, such as the vows of obedience, poverty and chastity, and any other special precepts particular to any rule or order which belong to their essential nature and to the preservation of common life [...]”; Gerhartz, in his doctoral dissertation, identified that “special” vows are “[...] a direct expression of the special end or goal of a particular religious order [...]”; and Pejska said that their purpose is “to bind a member more firmly to the order or to seek to avoid abuses against the three major vows of religion.” The Jesuit mission vow *is* a direct expression of the special end or goal of the Society [as Ignatius said, it is our first principle and foundation], which belongs to its essential nature and the preservation of its common life,⁷⁷ ordered to bind members more firmly to the order and to protect the three evangelical vows,⁷⁸ and it is not reasonable to conclude that the subject no longer owes obedience “circa missiones” to the superior general. On the contrary, this investigation leads to the understanding that it is better to recognize that the early interpreters of the vow were not in error. In principle, the third vow covers all aspects of the commitment of

⁷⁷ See the motivations discussed at the *Deliberations*.

⁷⁸ See the *Constitutions*, Part VIII, entitled: “Helps toward uniting the distant members with their head and among themselves;” and FUTRELL, *Making an apostolic Community of Love*.

obedience. That commitment is amplified with greater intensity through an express vow which helps to protect and reinforce the three evangelical counsels. And not only does it amplify the intensity of the obligation of obedience, it extends the obligation and specifies those elements of obligation not expressly covered in the third vow (to go on foot, to pagan countries, without provisions for the journey, etc). Thus, consistent with the principle of subsidiarity, the superior general has all the requisite authority to carry out his office, and he holds ordinary, *proper* power over the missions.

C. Renewed Legal Context: The Revision of the Code of Canon Law

Even if one were to find this resolution based on the historical data to be unconvincing, the evolution of law and the changes incorporated into the recent revision of the Code of Canon Law provide for a line of reasoning which does settle the matter. “The restoration of the juridical order of the Church was one of the great goals of this [revision of the] Code,”⁷⁹ There is no doubt that many of the most significant changes introduced into the 1983 Code were influenced by the Second Vatican Council’s renewed emphasis on the notion of *communio*. The full ramifications of this shift from an ecclesiology of “perfect society,” to an ecclesiology of “*communio*” will take many years to become settled, but some of the early implications on the understanding of the Church’s structure can already be discerned and will be referred to in due course.⁸⁰

⁷⁹ *The Annotated Code*, p. 430, commentary on c. 617.

⁸⁰ The Second Vatican Council’s renewed emphasis on the notion of *communio* has had significant ramifications on almost every aspect of the Church’s life and self-understanding. R. KASLYN, *Canonical Communion: A Reading of Canon 209 §1*, (= KASLYN), JCD diss., Ottawa, Saint Paul Univ., 1992, xv, 294 p., explores many of the canonical implications, and especially includes an excellent bibliography. While we cannot give this topic the attention nor the space it deserves, we must at least acknowledge it, and specifically the notion of *communio hierarchica*, as one of the primary influences on the revised Code’s movement from the notion of jurisdiction towards the notion of the power of governance, and on the consequent shifts in the understanding of the Church’s structure.

The principle of subsidiarity was mentioned earlier, but several other of the principles for the revision of the Code of Canon Law, are of interest to this discussion. The third held that the Code should regard not merely justice but also equity, and its laws should show forth the spirit of charity, temperance, humanity, moderation and in this be distinguished from mere human law. It went on to say that the law should have a pastoral concern, leaving, where feasible, certain matters to the pastoral discernment of the bishops and other pastors. The fourth principle followed this line of thinking and held that greater discretionary power should be extended to those involved in the care of souls, and that greater freedom be afforded to *ordinaries* in the particular application of law. This was expressed through the desire that the various faculties already accorded to bishops *and others* be duly incorporated into the universal law. In fact, the whole system of “delegated faculties” was to be reconsidered.⁸¹

Several important shifts occurred as these principles were written into law. One, of course, concerned the notion of faculty. In the 1917 Code, canon 66 said that, “habitual faculties which are granted for ever or for a limited time or for a definite number of cases are considered privileges outside the law.” Canon 132 §1 of the revised Code says that “habitual faculties are governed by the provisions concerning delegated power.”⁸² The very existence of this canon seems to indicate that the legislator considers that a faculty is not precisely a delegated power, but, rather, is to be *governed* by the prescriptions for delegated power.

The revised Code left out the prescription of canon 66 of the 1917 Code and has introduced the simple and more direct formula concerning habitual faculties under the rubric of the ‘Power of Governance’ because, as the Code Commission stated in 1977, the exercise of faculties to hear confessions is an exercise of ecclesiastical governance.⁸³

⁸¹ See *Communicationes*, 1 (1969), pp. 77-100.

⁸² “Facultates habituales reguntur praescriptis de potestate delegata” (*CIC 83*, c. 132 §1).

⁸³ A. MENDONÇA, *Ecclesiastical Governance and Ecclesiastical Offices*, (= MENDONÇA), Class Notes for the Private Use of Students, Faculty of Canon Law, Saint Paul Univ., Ottawa, Winter, 1990, used with permission, p. 28.

There is no doubt that when the superior general sends a Jesuit on a mission it too is an exercise of ecclesiastical governance, and in keeping with the revision of law, the mission faculty is also to be considered under the rubric of the power of governance.

In the revised law, the practical implementation of the above mentioned principles of revision meant that for bishops, habitual faculties, such as those granted through the quinquennial and diocennial faculties, were either incorporated into the universal law, or are no longer needed. *Ecclesiae Sanctae* also expressed this sentiment:

Again, the mode of government should be such that the exercise of authority is rendered more effective and expeditious, as our times demand. Superiors, therefore, at every level should be given appropriate powers, so as to minimize unnecessary or too frequent recourse to higher authority.⁸⁴

For institutes this meant that various faculties which had been granted to the superiors general, especially of pontifically approved institutes, were also either incorporated into the universal law or were no longer needed.⁸⁵ Thus, even if one were to hold that the mission faculty is an habitual delegation, the express intention of the legislator would have us understand that the faculty was either duly incorporated into the universal law under the rubric of the power of governance, or is no longer needed. In fact, one could go so far as to say that, in light of the guiding principles and these examples of their incorporation into the revised law, an

⁸⁴ *Ecclesiae Sanctae*, II, 18 (cf. M. O'REILLY, *Norms on Consecrated Life* (cc. 572-633; 641-746), (= O'REILLY), Class Notes for the Private Use of Students, Faculty of Canon Law, Saint Paul Univ., Ottawa, 1989-1990, p. 195).

⁸⁵ Various grants made to religious superiors include the following: "Paul VI, Pont. Rescript, *Cum Admotae*, 6 Nov. 1964, granting certain faculties to superiors general of clerical religious institutes, secular institutes, societies of common life, of pontifical right; SCRel., Decree, *Religionum laicalium*, 31 May 1966, granting faculties to superiors general of lay institutes and societies, of men or women, of pontifical right subject to Cong. Rel., a decree of SCEvangel., of 7 Sept. 1967 granted similar faculties to pontifical institutes of religious women subject to it, in *CLD*, 7, pp. 72-74. The Cong. Rel. also suspended, experimentally, a number of canons of the 1917 Code, by Instr. SCRIS, *Renovationis causam*, 6 Jan. 1969, in *CLD*, 7, pp. 489-509, and Decree, *Ad instituenda experimenta*, 4 June 1970, in *CLD*, 7, pp. 80-82. There were also some lesser concessions in different documents. The Congregation for Oriental Churches by Decree of 27 June 1972, granted the same faculties to institutes under its authority, in *CLD*, 7, pp. 19-24" (O'REILLY, p. 196, note 1).

understanding that the general can act "circa missiones" only with ordinary, *vicarious* power would be deeply at variance with the intention and spirit of the present legislation.

Canon 596 says:

§1. Superiors and chapters of institutes enjoy that power over members which is defined in universal law and the constitutions. §2. Moreover, in clerical religious institutes of pontifical right they also possess ecclesiastical power of governance for both the external and the internal forum. §3. The prescriptions of canons 131, 133 and 137-144 are applicable to the power referred to in §1.⁸⁶

In the spirit of the guiding principles and the "new" ecclesiology, it would be helpful to consider briefly some of the motivations and the shifts in understanding incorporated into the revised Code so as properly to interpret those powers of a superior which are defined in the universal law.⁸⁷

When addressing the issue of power in a religious institute, the first thing to recognize is that the Supreme Pontiff is the highest superior for members of institutes (c. 590 §1).

The supreme authority, whether internal or external, over all the institutes and their members belongs to the pope, the true *superior*, in the strict sense of the word. He is the head or at the top of the internal hierarchy to the extent that the members of these institutes, whether religious or secular, owe him obedience, by reason of the vow of obedience or any other sacred bond which they undertake when they make their profession or are incorporated to an institute.⁸⁸

However mention must be made of canon 586 §1:

For individual institutes there is acknowledged a rightful autonomy of life, especially of governance, by which they enjoy their own discipline in the

⁸⁶ "§1. Institutorum Superiores et capitula in sodales ea gaudent potestate, quae iure universali et constitutionibus definitur. §2. In institutis autem religiosis clericalibus iuris pontificii pollent insuper potestate ecclesiastica regiminis pro foro tam externo quam interno. §3. Potestati de qua in §1 applicantur praescripta cann. 131, 133 et 137-144" (CIC 83, c. 596).

⁸⁷ The Apostolic Constitution, *Sacrae disciplinae leges*, which promulgated the 1983 Code, stated: "In fact, in a certain sense, this new Code can be viewed as a great effort to translate the conciliar ecclesiological teaching into canonical terms. If it is impossible perfectly to transpose the image of the Church described by conciliar doctrine into canonical language, nevertheless the Code must always be related to that image as to its primary pattern, whose outlines, given its nature, the Code must express as far as possible" (see *The Annotated Code*, p. 53).

⁸⁸ *The Annotated Code*, p. 417, commentary on cc. 589-596.

Church and have the power to preserve their own patrimony intact as mentioned in canon 578.⁸⁹

The primary intention of this canon is, of course, to safeguard the patrimony of each institute. But the notion of autonomy is of great canonical significance in that it helps define the proper balance of the structure of authority which exists between the Holy See and a religious institute. It must be noted that “[...] the autonomy is not absolute, but one that is externally restricted by the authority of the Apostolic See [...] which in] the exercise of this external power is not absolute either, since it is also limited by the lawful autonomy of each institute.”⁹⁰ The law thus protects the distinction between the *external* and the *internal* hierarchy of institutes within the Church.

But how does the Church understand authority, and how has this revision of law affected the understanding of its structure in the Church? M. O’Reilly says the following:

All authority finally comes from God (Rom. 13, 1). In institutes of consecrated life, since the existence of the institute itself derives from two sources, the action of the founder/foundress, under the inspiration of the Holy Spirit, and the action of the Church in approving and giving canonical status to the community/institute, so too in a certain sense we can say that the authority comes both from the will of the members (in freely associating) and from the hierarchical Church. Through the ecclesiastical approval the pope becomes the supreme superior (c. 590) and the institute becomes subject to the relevant canonical norms. Moreover, the Church confers on the institute the authority to govern itself, within the limits defined by the universal law or [sic and] the proper law of the institute. Thus, authority is, in the last resort, based on the authority conferred by Christ on the Church. On account of the auto-determination allowed, within limits, to general chapters, we can also say that authority is, in part, derived from the group, through their representatives. This source, however, can never be regarded as autonomous with respect to the authority of the hierarchical Church. Since an institute of consecrated life has a public and ecclesial nature, it depends on the public authority of the Church. The members, even in their general chapter, cannot give, take away or limit the authority of superiors, independently of and contrary to the decisions of the

⁸⁹ “§1. Singulis institutis iusta autonomia vitae, praesertim regiminis, agnoscitur, qua gaudeant in Ecclesia propria disciplina atque integrum servare valeant suum patrimonium, de quo in can. 578” (CIC 83, c. 586 §1).

⁹⁰ *The Annotated Code*, pp. 414-415, commentary on c. 586.

competent ecclesiastical authority, as expressed especially in canon law and in the ecclesiastically approved constitutions of the institute.⁹¹

One can readily see the similarity of this hierarchical structure with the medieval world-view of Ignatius, who understood the foundation of obedience as “[...] authority derived from God, through Christ to the pope, who in turn delegates it to subordinate officials such as bishops and religious superiors.”⁹²

In the 1917 Code the notion of *jurisdiction* was quite important.

The power of jurisdiction was understood to be a ‘moral faculty’ or ‘the right to rule’ which consequently demanded obedience from those subject to the one who had such power. The words ‘which exists in the Church by divine institution’ were used to distinguish this ‘right to rule’ from others which flow from the natural law, e.g., the power of a father (mother) over his (her) children, the power of the government to rule its subjects, etc. The power of the Church to rule its *subjects* flows from its very nature which is supernatural. The Church was proclaimed by papal pronouncements as a perfect society and, therefore, as having its own ‘public power.’ Canon 196 of the 1917 Code was understood in this sense, and the words ‘exists in the Church’ were interpreted as implying that this authority is ‘a formal part of the Church of Christ without which the perfect society may not exist.’ One can see from this explanation how the understanding of the Church’s power to govern was tied in with the notion of the Church as a perfect society. The power of the Church was, in a sense, analogous to the power of other societies. Moreover, with such an understanding of the Church’s power, its exercise was restricted to those who were in sacred order.⁹³

J. Ratzinger addressed this even more strongly, and accounted for the shift in thinking brought about through the Second Vatican Council, when he wrote in 1986:

⁹¹ O'REILLY, p. 207. Cf. also, E. GAMBARI, *Consacrati e Inviati*, Milano, Ancora, 1978, pp. 541-560. There are four distinct types of normative sources which regulate the governance of institutes of consecrated life: the universal law; particular law; “[...] the *fundamental or constitutional norms of proper law of each institute* contained in the *fundamental code or constitutions*, drawn up by the collegial bodies of the institute and approved by the competent authority of the Church, the holy see or the diocesan bishop [...]”; and the other norms of proper law which emanate from the competent authority of institutes, such as decrees on poverty, etc. (see *The Annotated Code*, p. 415, commentary on c. 587).

⁹² GANSS, *Cons.*, p. 247, note 4.

⁹³ MENDONÇA, pp. 6-7. Canon 196 of the *CIC 17* said that the power of jurisdiction or government which exists in the Church by divine institution, is divided into that of the external forum and that of the internal forum, or the forum of conscience; and the latter is either sacramental or extra-sacramental.

Until World War I, the Catholic Church has been considered an ossified apparatus obstinately resisting the achievements of the modern age. In theology, the question of papal primacy had predominated to such an extent that the Church appeared to be essentially a centrally governed institution which one stubbornly defended but which somehow still confronted one only from the outside. Now it was apparent again that the Church is much more; that all of us carry it together in faith in a living way, just as it carries us. It became apparent that it grows organically, just as it has through the centuries, so too today.⁹⁴

For J. Beyer, the notion of ecclesial communion gave rise to a new understanding of hierarchical communion:

Finally, we can give [hierarchical communion] a broader meaning: the entire Church forms a hierarchical communion, not because it is a hierarchy which governs it, but as a life that is hierarchically structured according to diverse ecclesial orders. These arose from liturgical usage which was the first external structure of the assembly: the Church celebrating the Eucharist and gathering itself around the altar.⁹⁵

For R. Sobański, this means that:

[...] the principle of authority, even if it appears in a number of places in the Code, especially in the context of the whole Church, has lost its character of being an absolute criterion; in conformity with the teaching of the dogmatic Constitution on the Church (no. 23), it has become the principle of unity of the Church, and not simply the principle and foundation of the Church.⁹⁶

⁹⁴ J. RATZINGER, "The Ecclesiology of the Second Vatican Council," in *Communio: International Catholic Review*, 13 (1986), p. 240. Cf. KASLYN, p. 241.

⁹⁵ "On peut enfin lui donner un sens plus large: toute l'Église forme une *communio hierarchica*, non pas parce qu'elle est hiérarchie qui gouverne mais comme vie hiérarchisée selon les divers ordres ecclésiaux selon l'usage liturgique qui fut la première structure externe de l'assemblée qu'était l'Église célébrant l'Eucharistie et se réunissant autour de l'autel" (J. BEYER, "La 'communio' comme critère des droits fondamentaux," in *Les droits fondamentaux du chrétien dans l'Église et dans la société*, Actes du IV^e Congrès international de droit canonique, Fribourg, 1980, E. CORECCO, N. HERZOG, and A. SCOLA, eds., Fribourg, Éditions Universitaires, 1981, p. 83). Cf. KASLYN, p. 191.

⁹⁶ "Le principe d'autorité, bien qu'il apparaisse en de nombreux endroits du Code, surtout dans le contexte de l'Église universelle, a perdu son caractère de critère absolu; conformément à l'enseignement de la Constitution dogmatique sur l'Église (no. 23), il est devenu principe de l'unité de l'Église, et non plus principe et fondement tout simplement de l'Église" (R. SOBAŃSKI, "L'ecclésiologie du nouveau Code de droit canonique," in *The New Code of Canon Law*, Proceedings of the 5th International Congress of Canon Law, M. THÉRIAULT and J. THORN, eds., Ottawa, Saint Paul Univ., 1986, p. 267). Cf. KASLYN, p. 192.

It should be no surprise that with this kind of thinking as a backdrop, the 1983 Code accounted for the possibility of lay *cooperation* in the exercise of ecclesial governance.⁹⁷

While the legislator was careful not to issue any doctrinal statement concerning this widely debated issue, the discussion itself led to much rethinking regarding the nature of power and how it is structured in the Church.

The 1977 *Schema* of the Code, in canon 97 stated: 'We use the expression "power of governing" instead of "power of jurisdiction," the more proper expression being "power of governing" because this expression fits history better, and because it is more in accord with the teaching of the dogmatic

⁹⁷ This very complex issue, still much in need of clarification, is well summarized in the following commentary: "The doctrinal point discussed in these canons [i.e., the canons on the Power of Governance beginning with *CIC* 83, c. 129], and which was widely debated in the postconciliar period, is that of whether the *potestas regiminis*—power of governance—is inseparably associated with the *potestas sacra* and therefore associated with the reception of holy orders (cf. c. 118 of the *CIC* 17), or whether lay people can also exercise it, within certain limits. Postconciliar legislation does offer a precedent, that of the exercise of judicial power by laypeople (cf. M. P. *Causas matrimoniales* V, 28-03-1971, *AAS*, 63 [1971], pp. 443-444; *CLD*, 7 [1968-1972; cf. c. 142, §2).

"Juridical power in the Church—understood as the subjective juridical situation capable of unilaterally producing effects in other persons—is of sacramental origin: in the first analysis, it is based on the power given to Peter and the other apostles. The problem is to figure out how, given that sacramental origin, power of governance is transmitted concretely. The *Preliminary Explanatory Note 2* of *LG* associates the *Potestas*—i.e., the juridical exercise of the *munera* received by sacrament—with a subsequent canonical determination made by competent authority; conceptually, however, it does not make *potestas* depend exclusively on the *munera* received by means of the sacrament of orders. The Council itself affirms that laypeople who have received the *munera* inherent in the sacrament of baptism, also have 'the capacity of being appointed by the hierarchy to some ecclesiastical offices with a view to a spiritual end' (*LG* 33) to which are linked certain obligations and rights implying some kind of juridical power (as indicated in c. 145 §2).

"Nevertheless, the practical solution adopted by the legislator is not to issue any doctrinal pronouncement on the existence of a *potestas regiminis* not linked subjectively to the *potestas sacra*, as it was implicitly acknowledged by the drafts of the present c. 129 (cf. *Comm* 14 [1982], pp. 147-149). However, on the strictly juridical plane—where it is of prime importance to know if the *potestas regiminis* may also be exercised by laypeople within their appropriate area of competence—the canons of the present title dispell all doubts and are a clear statement of this possibility. (Also, one should not forget that c. 132 says that habitual faculties are governed by the prescriptions on delegated power.) It is important to be aware that this question of the exercise of power of governance by laypeople is of theoretical and doctrinal importance in order to determine the nature of this power in relation to the structure of the Church since laypeople are not involved as such in the structures of Church order and governance (cf. cc. 224-231).

"Insofar as the nature of the subject matter or the law itself does not forbid it, the norms of the present title may also be applied to the power of superiors or chapters of male and female institutes of consecrated life (cf. c. 596, §3, and its commentary; the authentic interpretation from the CPI/17-67 of 26-03-1952, *AAS*, 44 [1952] p. 497; *CLD*, 3 [1942-1953] p. 73). However, except for the discipline regarding clergy, the nature of the juridical power exercised by these superiors is different from hierarchical power: one power comes from the juridical dependence proceeding from baptismal obligations (hierarchical power or power of governance in the strict sense); the other comes from the obligation of obedience to a superior proceeding from the sacred bond (power which was called 'dominative' in the *CIC* 17)" (*Annotated Code*, pp. 144-145, commentary on c. 128).

In the Society this issue most directly affects the temporal coadjutors (or brothers), and whether they may be admitted to the fourth vow, hold certain offices or are capable of participating in the governance of the Society, for example at a General Congregation. See *Clericalia instituta*, S.C. Rel. et S.I., 27 Nov. 1969, in *AAS*, 61, p. 739; also in *CLD*, 7, pp. 468-469.

Constitution *Lumen gentium* and the decrees of the Second Vatican Council, in which a distinction is made between the offices of teaching, of sanctifying and of ruling. "Jurisdiction" as at one time, and commonly today in civil legislations, is reserved to the activity of judicial power.⁹⁸

This shift from *jurisdiction* to *power of governance* was thus based, at least in part, on the difference between *munus* and *potestas*.

The word *function* is deliberately used in preference to *powers* which can have the sense of power *ordered to action*. A *canonical* or *juridical determination* through hierarchical authority is required for such power ordered to action. A determination of this kind can come about through appointment [or election] to a particular office or the assignment of subjects, and is conferred according to norms approved by the supreme authority.

The distinction, therefore, is between the *ontological* sharing in the *sacred functions* (*munera sacra*) and *canonical mission*. The *ontological* function (*munus*) cannot be actualized without canonical mission by which the *power is ordered to action*. Canonical mission, that is, admission to the office is made only when the person (bishop) is in apostolic communion (LG 24). Because the title in question deals with the specification of ecclesial governance, the rubric is 'The Power of Governance.'⁹⁹

This approach also solved the problem of the distinction between the powers of external and internal forum which was expressed in canon 196 of the 1917 Code. The Code Commission and the consultors unanimously agreed that, although the effects of its exercise can be different, the power of the internal forum and that of the external forum is the same power of governing.¹⁰⁰

For institutes in the Church the conceptual move from jurisdiction to power of governance had another impact as well:

⁹⁸ See *Communicationes*, 9 (1977), p. 234.

⁹⁹ MENDONÇA, p. 4. Tillard says that the *Nota* "[...] distinguishes between the *munera* implied in sacramental ordination (using *munera* [...] to include the responsibilities and the powers needed to fulfill them); and *potestas* in practice, by which it means the discharge of the *munera*. The sacrament of ordination gives *all* the first group, duly pointed towards the action for which they exist and equipped with the necessary powers. This action, however, will only be in practice all that it should be—functions and powers of communion—thanks to the *canonical determinatio*" (J.-M.-R. TILLARD, *The Bishop of Rome*, [in the collection, *Theology and Life*, no. 5], Wilmington, Michael Glazier, 1983, p. 155).

¹⁰⁰ See MENDONÇA, pp. 4-5. See also *Communicationes*, 9 (1977), pp. 234-235.

1) On the one hand, the expression 'dominative power' disappears, since it does not fully correspond to its true nature, as power in all institutes derives from ecclesiastical power, although it is not called power of governance in the strict sense. The legislator did not wish to be more specific in this delicate doctrinal area, and has restricted himself to giving practical norms, by virtue of which the exercise of this power—whatever its nature may be—is governed by the same norms as the power of governance, particularly executive power.

2) The number of institutes with ecclesiastical power of governance both for the external and internal forum has grown. Before, only *exempt* clerical religious institutes possessed ecclesiastical jurisdiction as such, in virtue of which their major superiors were Ordinaries. [...]¹⁰¹

There are two points to consider here. The first is to acknowledge that even lay religious institutes which do not possess the power of governance in the strict sense are recognized by the legislator as exercising an authority which is to be governed by the same norms as the power of governance. The Society, however, as an exempt clerical institute of pontifical right, even under the previous legislation was recognized as possessing the power of jurisdiction, now called the power of governance, with the major superiors recognized by law as ordinaries.

The second pertains to the "manifestation of conscience" which was discussed in the previous Chapter. It was pointed out that manifestation is at the heart of the internal forum government of the Society, and specifically linked to the matter of who should be sent on missions and where they should be sent, not only for the good of the mission, but also,

¹⁰¹ *The Annotated Code*, p. 420, commentary on c. 596. The same commentary also says: "[...] it would be correct to say that the concept and content of exemption have undergone a considerable change. Formerly it was the centrepiece of the canon law on religious. For example, the superiors in exempt clerical religious institutes were the only ones with power of jurisdiction. In the current legislation, exemption is mainly restricted to the area of internal governance and is not used as an exclusive criterion for the concession of the power of governance (cf. c. 596)" (ibid., pp. 418-419, commentary on c. 591). Earlier it was mentioned that superiors who have at least ordinary executive power in clerical institutes of pontifical right and of clerical societies of apostolic life of pontifical right (c. 134 §1) participate in ecclesiastical jurisdiction not only in the internal forum, but, as defined by the constitutions and c. 596 §2, in the external forum as well. The *CIC 17* referred to these powers, especially in c. 501, and later the Code Commission applied them to dominative power, by analogy to cc. 197, 199, and 206-209. For an excellent discussion of this see J. O'Connor, "Dominative Power of Religious Superiors," in *The Jurist*, 21 (1961), pp. 1-26, a paper given at the *CLSA* annual meeting in Philadelphia. Another commentator points out that, "this power, called dominative in the 1917 Code and in tradition is no longer so called out of respect for the autonomy of the individual person and his/her free subjection to the authority of superiors. It was suggested to the Commission that the term 'power' should be replaced by that of 'authority' but this suggestion was not accepted, the Commission answering that they were distinct concepts" (O'REILLY, p. 213).

potentially, for the good of the individual Jesuit.¹⁰² It is the superior who receives the manifestation, not the pope, and thus the superior who has the ordinary, proper exercise of this power of governing. If the pope were to circumvent the superior by intervening directly—by sending a particular Jesuit on a mission without consultation with the superior—not only would the spirit, and indeed the very point of the manifestation be violated, but also, since the manifestation has been recognized and defined as an essential element of the institute, it would seem to be a compromise of the rightful autonomy of life and governance mentioned in canon 586. It also could be suggested, that if the superior general could act “circa missiones” only with delegated power his office would be rendered less stable, and he would be in the matter of missions, no more than a bureaucratic secretary. But this is not now, nor has it been for several hundred years, the long standing praxis of the Holy See nor the perception of the Society, nor does such reflect the spirit of the revised Code.¹⁰³

D. Consequences for the Society

This brief sketch of the way the revised Code perceives the lines of authority in the Church—especially the practical application of the implications of the principle of subsidiarity, the rethinking regarding of the notion of faculty, and the shift from “jurisdiction” to “power of governance”—serves to strengthen the historically based interpretation that when he sends a

¹⁰² See *Cons.*, [92].

¹⁰³ This reasoning is based on an argument suggested by F. J. URRUTIA, “Delegation of the Executive Power of Governance,” in *Studia canonica*, 19 (1985), pp. 350-353. The issue he was addressing concerns whether a lay person (a religious brother or sister) can be appointed to the office of episcopal vicar for religious. Canon 478 §1 states that vicars general and episcopal vicars are to be priests, and the document, “Mutual Relations,” suggests or implies that the vicar for religious should also be a priest since the powers exercised are episcopal in nature, but it does not explicitly state that it must be so. “Then why not promote a religious lay person (male or female) to be the bishop’s delegate for religious with delegated powers? Such a solution, Urrutia points out, would be more deeply at variance with the present legislation. In the first place it would amount to the creation of an office similar to that of the episcopal vicar without the *ordinary powers* proper to that office, and secondly the position itself, because it would be endowed with delegated powers would be less stable and, therefore, less desirable according to the spirit of the law. Moreover, a figure without real executive power would be no more than a bureaucratic secretary” (MENDONÇA, pp. 12-13).

professed Jesuit on a mission the superior general of the Society acts with ordinary, proper power. In the context of the present Code, it could be said that his election gives to the superior general the canonical or juridical determination—the power to mission. The universal law itself grants the canonical mission by which this power is ordered to action. The law, it can be said, grants this mission through: the intentions expressed in the guiding principles for the revision of the Code; implemented especially by either eliminating faculties or incorporating them into the universal law under the rubric of the power of governance; and through express directives such as the one quoted from *Ecclesiae Sanctae*. Thus, again, the superior general acts with ordinary, proper power when he sends a professed Jesuit on a mission.

How, then, does one respond to Delchard's claim that only one, the pope or the superior general can hold ordinary, *proper* power over the matter of missions? The methodology of the interpretation of juridical texts would have us look to parallel cases, if there be any. Canon 331 says that:

The Bishop of the Church of Rome, in whom resides the office given in a special way by the Lord to Peter, first of the Apostles and to be transmitted to his successors, is head of the college of bishops, the Vicar of Christ and Pastor of the universal Church on earth; therefore, in virtue of his office he enjoys supreme, full, immediate and universal ordinary power in the Church, which he can always freely exercise.¹⁰⁴

This power of the pope, defined by the First Vatican Council, in no way compromises the power of bishops over their own dioceses, since canon 333 says that:

§1. The Roman Pontiff, by virtue of his office, not only has power in the universal Church but also possesses a primacy of ordinary power over all particular churches and groupings of churches by which the proper, ordinary and

¹⁰⁴ "Ecclesiae Romanae Episcopus, in quo permanet munus a Domino singulariter Petro, primo Apostolorum, concessum et successoribus eius transmittendum, Collegii Episcoporum est caput, Vicarius Christi atque universae Ecclesiae his in terris Pastor; qui ideo vi muneris sui suprema, plena, immediata et universali in Ecclesia gaudet ordinaria potestate, quam semper libere exercere valet" (CIC 83, c. 331).

immediate power which bishops possess in the particular churches entrusted to their care is both strengthened and safeguarded.¹⁰⁵

The supreme moderator of a clerical institute of pontifical right, as an ordinary for his own members,¹⁰⁶ holds proper, ordinary and immediate power over the institute. It would not be forcing too much by analogy to say that the Roman Pontiff, by virtue of his office, and by virtue of the universal law (c. 590 §2), possesses a primacy of ordinary power over all institutes, particularly clerical institutes of pontifical right in the Church, by which the proper, ordinary and immediate power which supreme moderators possess in their institutes is both strengthened and safeguarded. Thus, in matters pertaining to missions, as in other matters of the ordinary governance of the institute, the superior general acts with *ordinary, proper* power.

This interpretation in no way compromises the “special” relationship between the pope and the Society, rather, as canon 333 §1 points out for the case of bishops, the relationship between the pope and the superior general can be seen to be strengthened and safeguarded. When the superior general assigns a Jesuit to an apostolic ministry, sends him on a mission, the professed Jesuit owes to the superior general *all* of his obedience. The *Constitutions* adequately state that the general, and every Jesuit, is always subject to respond to an obedience from the pope, thus giving his missions due priority. The pope is always free to entrust “special” missions to the Society, not only because he is the first or highest superior of all religious by virtue of their evangelical vow of obedience (canon 590), but also by virtue of the “special” relationship which exists between the pope and the Society—expressed first and most clearly through the “special” obedience of the professed in their fourth vow, but also through the spirit and intention of the entire Society, expressed through the third vow “[...] shown first to the sovereign pontiff

¹⁰⁵ “§1. Romanus Pontifex, vi sui muneris, non modo in universam Ecclesiam potestate gaudet, sed et super omnes Ecclesias particulares earumque coetus ordinariae potestatis obtinet principatum, quoquidem insimul roboratur atque vindicatur potestas propria, ordinaria et immediata, qua in Ecclesias particulares suae curae commissas Episcopi pollent” (CIC 83, c. 333 §1).

¹⁰⁶ CIC 83, c. 134 §1. In the terminology of the CIC 17, c. 10, they would also be prelates.

[...].” And more, the exigencies of the fourth vow specifically provide for the pope, if he so desires, to intervene directly by giving a particular mission to a particular, professed Jesuit, who, if so directed, must comply immediately, set out on foot, without provisions for the journey, etc. Such an intervention on the part of the pope, however, does not compromise, diminish, eradicate, nor even suspend the superior general’s legitimate internal power of governance over the institute. Rather, a specific exercise of the pope’s primacy of ordinary power, even through a specific invocation of obedience by virtue of the fourth vow, could only strengthen and safeguard not only the proper, ordinary and immediate power of the superior general, but also the essential nature of the Society itself. The history of the usage of the vow points out, that, as O’Malley says: “for the Jesuits and for their relationship to the papacy, the vow was of the utmost importance, but from the beginning it was, with few exceptions, a symbol rather than a practical instrument for deployment of manpower.”¹⁰⁷

Thus, in the Society, there are not two lines of obedience, as Iturrioz suggests, but, consistent with Ignatius’ world view and his understanding of authority, and also consistent with the Church’s understanding and structuring of the “power of governance,” there is one line of authority. This authority begins from Christ, the source of all authority, and is conveyed to the Church and to the Vicar of Christ. The Church confers on the institute the power to govern itself within the limits set by the universal law and the proper law of the institute. The institute, both through the fourth vow—motivated by a desire for greater devotion in obedience to the Apostolic See, greater abnegation of our own wills, and for the surer direction of the Holy Spirit—and through its declared desire to show obedience first to the Supreme Pontiff, intensifies and extends its obligation and expresses its special willingness to be of service to the pope and to the Church. It is in this sense that the fourth vow is seen as the unique expression of the Society’s desire to respond to the vocation that the companions felt and believed themselves to have received from

¹⁰⁷ O’MALLEY, *The First Jesuits*, p. 300.

God, and it becomes the primary expression for the protection of the choice of apostolic ministries, to respond always to the *greater* glory of God and the aid of souls, and the *most universal* good, with the pope, as the Universal Pastor, and especially as the Vicar of Christ, best able to assist in the selection of the Society's missions.

E. The Doctrinal Question

One final question must be addressed when considering the obligation imposed by the fourth vow. Perhaps the strongest critic of the interpretation we suggest, J. G. de Madariaga, in his most popular article, asked, "The Jesuits' Fourth Vow: Can It Extend to What He Teaches?"¹⁰⁸ Madariaga argues vehemently that "[...] matter which is doctrinal can indeed form part of the proper object of the fourth vow; and that the pope can impose an order which is strictly or purely doctrinal in virtue of that vow."¹⁰⁹ He summarizes his position in the following statement:

To say that doctrinal matter enters into the vow means that the pope can impose a doctrinal mission in virtue of the fourth vow. He can command the defense of any Catholic truth whatever, even if it is not infallible. Although in the texts we have been commenting upon, no limits have been set down regarding this submissive acceptance of a teaching imposed by the pope, we believe that the limits of rational human possibility must be supposed. These

¹⁰⁸ G. de MADARIAGA, "The Jesuit's Fourth Vow: Can It Extend to What He Teaches?," in *RJR*, 41 (1982), (= MADARIAGA), pp. 214-238, translated from "¿Entra la materia doctrinal como objeto propio del 4º Voto? (y II)," in *Manresa*, 53 (1981), pp. 227-255. The first part of this article appeared with the same title in *Manresa*, 49 (1977), pp. 215-228. These articles were based on the work of his thesis, *Carisma fundacional de Ignacio de Loyola y Obediencia especial al papa en la Compañía de Jesús*, ThD diss., PUG, 1975, liii, 781 p. In *Manresa* the same author contributed related articles: "La oblación del grupo Ignaciano al Papa en 1538," 48 (1976), pp. 25-39; "Contenido de la cláusula papal del voto de Montmartre," in *Manresa*, 48 (1976), pp. 231-245; "La oblación al Papa según las Deliberaciones de 1539," in *Manresa*, 49 (1977), pp. 55-68; "El sentido verdadero en la Iglesia militante para en todo acertar," in *Manresa*, 50 (1978), pp. 147-168. See also J. GRANERO, "El papa y la Compañía," in *Manresa*, 41 (1969), pp. 5-16, especially pp. 14-16; B. DE MARGERIE, "El cuarto voto de la Compañía de Jesús, según Nadal," in *Manresa*, 42 (1970), pp. 359-276, especially p. 370, and his "Papacy, Collegiality, Ecumenism and the Jesuits. The Significance and Consequences for Ecumenism of the Fourth Vow of the Society of Jesus," in *Science et esprit*, 25 (1973), pp. 409-429.

¹⁰⁹ MADARIAGA, p. 236.

limits, it seems to us, are at the point where *it is impossible to doubt regarding the falsity of some papal teaching.*¹¹⁰

It was this position of Madariaga's which prompted J. O'Malley to undertake an historical study of the fourth vow in which he offers several telling criticisms of Madariaga's work. He begins by pointing out that Madariaga seems "[...] to be arguing for the obvious [...]"¹¹¹ and that his argumentation seems "[...] to beg the question."¹¹² Although Madariaga points out that Ignatius did have a profound loyalty to the Church, its customs and practices, and to the Holy See, the popes and their policies; that Ignatius had strong convictions regarding the inerrancy of the Church and saw that many of the early missions of the Society were related to "orthodox Catholic teaching,"¹¹³ what Madariaga fails to show is how all these facts support his conclusion that the pope can command adherence to some specific doctrine by virtue of the fourth vow.¹¹⁴

O'Malley, after having dedicated sections of his own analysis to St. Ignatius' positions vis a vis doctrine, orthodoxy and the Church, suggests that "several highly questionable presuppositions underlie Madariaga's method of argumentation,"¹¹⁵ to the point where "[...] Madariaga's methodological presuppositions render the substance of his arguments about the

¹¹⁰ MADARIAGA, p. 238. Emphasis is mine.

¹¹¹ O'MALLEY, "The Fourth Vow," p. 35.

¹¹² O'MALLEY, "The Fourth Vow," p. 36.

¹¹³ O'MALLEY, "The Fourth Vow," p. 35.

¹¹⁴ O'MALLEY, "The Fourth Vow," p. 36.

¹¹⁵ O'MALLEY, "The Fourth Vow," p. 36. The example used by O'Malley is Madariaga's statement that Ignatius identifies the Church with the papacy. O'Malley points out that this was "[...] the extreme ecclesiology of Giles of Rome" (p. 36), but that "Ignatius identified Thomas Aquinas as the preferred theologian of the order and Aquinas never identified the Church with the papacy."

thinking and practice of the early Society untrustworthy."¹¹⁶ These presuppositions include: 1. "[...] that Ignatius simply identifies the Church with the pope."¹¹⁷ 2. Madariaga in his method "[...] avoids some important distinctions that the early Jesuits themselves made, especially about the papacy, and *forces* from their statements a maximal sense."¹¹⁸ 3. Madariaga describes the "papal magisterium" as "[...] 'so prominent among the offices of the Holy See' " presupposing that it was so in the time of Ignatius, thus he "[...] seems to read back into the sixteenth century a reality that came into existence only in the nineteenth [...]."¹¹⁹

O'Malley states:

Moreover, his style of treatment and the emphasis on *totalidad* tend to remove the object of the vow from any specific delimitation, whereas the canonical practice of the Church has always striven to circumscribe carefully where the obligations of a vow begin and where they end. The alternative to this practice opens the floodgates to scrupulosity and to other problems as well. The symbolic character of a vow, as an expression of a religious ideal, should be expansive, but the proper object of a vow must, by the nature of the case, be clearly localized, as we see exemplified in the varieties of practice of the vow of poverty in different religious institutes.¹²⁰

¹¹⁶ O'MALLEY, "The Fourth Vow," p. 38.

¹¹⁷ O'MALLEY, "The Fourth Vow," p. 36. O'MALLEY says that "the textual basis for this identification is a line, lifted out of context, from the famous letter on obedience, *Epplg*, IV, p. 680 (26 March 1553), "[...] y en la hierarchia ecclesiastica, que se reduce á un universal vicario de X^o nuestro señor." The best interpretation of this statement is from another of Ignatius' letters on obedience, to Andrés de Oviedo, *ibid*, II, p. 56 (27 March 1548), "[...] lo mismo la ecclesiástica hierarchia y subordinación de perlados debaxo de un pontífice." YOUNG, p. 295 correctly translates the line in question (1553) into English: therefore, "[...] and in the hierarchy of the Church, the members of which render their obedience to the one universal vicar of Christ our Lord" (*id.*, pp. 58-59, note 101).

¹¹⁸ O'MALLEY, "The Fourth Vow," p. 37. Emphasis is mine. "For instance, in interpreting a text of Nadal concerning the fourth vow, Madariaga asserts that Nadal means that Jesuits should 'unconditionally bolster the authority of the Holy See' (MADARIAGA, p. 231; in the Spanish article, p. 247, 'incondicionalmente'). That 'unconditionally' is nowhere evident in the quotation from Nadal that he adduces" (*id.*, p. 59, note 106).

¹¹⁹ O'MALLEY, "The Fourth Vow," p. 37-38. Cf. also the excellent study by PADBERG, "Realistic Reverence," especially p. 30 ff.

¹²⁰ O'MALLEY, "The Fourth Vow," pp. 38-39.

More so than any other author, Madariaga illustrates the importance of separating the *virtue* of the practice of obedience, here called the *symbolic character*, from the strict obligation incurred by the *vow* of obedience.¹²¹

O'Malley concludes his treatment of Madariaga by pointing out that such commands have never been given, that there is no evidence in writing or in deed that the early Jesuits had Madariaga's understanding of the vow. He proposes that the phrase, "do whatever they command that pertains to the progress of souls and the propagation of the faith," "[...] despite its generic terms, is best understood in a restrictive sense. It specifies the *pastoral* character of the vow, in accord with the pastoral purposes of the origins of the Society."¹²²

At this point we might indulge in a little fantasy ourselves. Just what would it mean if John Paul II commanded an individual Jesuit to defend *Laborem exercens*? Would he mean him to defend it 'blindly' and 'unconditionally'? Would he mean him to disregard all the theological considerations that must be applied to the interpretation of any ecclesiastical document? Is that what this 'special' obedience would mean? I certainly would not think so, for such a command to violate the criteria for 'true' interpretation, which we must assume any pope wants. But if it does not mean that, what does it mean, and how would the Jesuit's 'defense' be different from anybody else's? Do we not assume that the pope subscribes to the norm that Vatican Council II offered for interpreting its own pronouncements? They are to be 'interpreted according to the general rules which are known to all.' Whatever that norm means, it indicates that discretion and differentiation are to be employed in the 'reception' of the documents of the Council. If that is true of conciliar documents, it would *a*

¹²¹Another author, J. SHEETS, "The Fourth Vow of the Jesuits," in *RJR*, 42 (1983), pp. 518-529, attempts to critique O'MALLEY'S, "The Fourth Vow," and defend Madariaga. If possible, Sheets tends to blur the necessary distinction between the *virtue* and the *vow* even more than does Madariaga. In his *Studies* on Nadal, in note 16, O'MALLEY responds to this article of Sheets. There he says: "his criticisms are not convincing, in my opinion, nor is the alternative clear that he advances. (He rather inaccurately represents my position on some crucial points, I might add, especially pp. 520-522.) Sheets' concern to assign to the vow as much spiritual relevance as possible is appropriate, but I have to disagree with him on what he seems to propose as the content of that relevance. In his article, moreover, Sheets relies heavily on assertion, and he takes terms out of their historical context; while holding my methodology 'suspect' (p. 522), he never clarifies or justifies his own. In any case, I believe that this present number of *Studies* on Nadal, which was already at the publishers several months before Sheets's article appeared, confirms and further articulates the interpretation of the vow that I originally argued." Shortly after the publication of his article, J. Sheets was named an auxiliary bishop for a diocese in the United States.

¹²² O'MALLEY, "The Fourth Vow," p. 40.

fortiori seem to be true of ecclesiastical documents of less solemn status, like encyclicals and allocutions.¹²³

O'Malley contends that Ignatius does provide for us two principles that assist Jesuits in forming proper attitudes towards pronouncements of the Holy See, but that they relate only remotely to the fourth vow. The first is hermenutical, "[...] where he [Ignatius] asks us as good Christians to put a favourable interpretation on another's statement rather than condemn it. The second is pastoral, "we are always to be guided by the good of souls."¹²⁴

It should also be pointed out that Ignatius himself seems to address this question specifically in the *Formula of the Institute* where he says:

The Gospel does indeed teach us, and we know from orthodox faith and firmly hold, that all of Christ's faithful are subject to the Roman Pontiff as their head and as the Vicar of Jesus Christ [4].

This statement seems to indicate that even Ignatius held that a professed Jesuit was bound to the same obligations of belief and doctrine as any other of the faithful.

Recently, in its Decree, "On Having a Proper Attitude of Service in the Church,"¹²⁵ the Thirty-Fourth General Congregation, made several statements that relate to this matter. The Congregation renewed the fidelity of the Society to "[...] accepted norms of assent, and to Catholic teaching on the hierarchy of truths and the development of Church doctrine, in the official documents of the magisterium and in the common teaching of proven Catholic

¹²³ O'MALLEY, "The Fourth Vow," p. 41. For the quotation see "Explanatory Note" of the General Secretary of the Council, 16 Nov. 1964, *Documents of Vatican II*, pp. 423-424 (ID., p. 59, note 118). See also F. MORRISSEY, *Papal and Curial Pronouncements: Their Canonical Significance in Light of the 1983 Code of Canon Law*, Ottawa, Faculty of Canon Law, St. Paul Univ., 1992, 46 p., and *The Canonical Significance of Papal and Curial Pronouncements*, Hartford, CT, CLSA, 1974, 23 p.

¹²⁴ O'MALLEY, "The Fourth Vow," pp. 41-42. To these principles could be added, of course the "Rules for Thinking with the Church" found in the *Spiritual Exercises*.

¹²⁵ GC 34, D. 3.1.

theologians.”¹²⁶ But rather than advance a position in any way similar to that of Madariaga’s the same document went on to say that:

Ignatian obedience, in accord with the tradition of Catholic theology, has always recognized that our first fidelity must be to God, to the truth, and to a well-formed conscience. Obedience, then, cannot exclude our prayerful discernment of the course of action to be followed, one that may in some circumstances differ from the one suggested by our religious and Church superiors. Such discernment, and its respectful representation to superiors, is an authentic element of our Ignatian tradition confirmed in the Thirty-First General Congregation’s Decree 17 § 10 and clarified in Thirty-Second General Congregation’s Decree 11 § 55.¹²⁷

The document continued by saying that we should look for the central message of a magisterial statement, avoid selective and superficial criticism, “[...] and through discerning theological reflection, attempt to understand it in depth and explain it positively, respectfully and clearly.”¹²⁸

We will not underestimate the possibility of giving scandal, nor forget that between the extremes of premature, ill-considered public criticism and servile silence there exists the alternative of moderate and respectful expression of our views.¹²⁹

There is no question that the Society truly desires “to serve the Lord alone and the Church, his spouse, under the Roman Pontiff,”¹³⁰ but, with all due respect to Madariaga, it is equally clear that matter which is doctrinal is not part of the proper object of the fourth vow.

¹²⁶ GC 34, D. 3.1, no. 11. The document cites *Unitatis redintegratio*, 11; *Mysterium Ecclesiae* 4–5; and *CIC* 83, cc. 750–754; the *CCEO*, cc. 598–600; and the *Catechism of the Catholic Church* §§ 85 ff.

¹²⁷ GC 34, D. 3.1, no. 14.

¹²⁸ GC 34, D. 3.1, no. 23.

¹²⁹ GC 34, D. 3.1, no. 24.

¹³⁰ *Formula of the Institute*, [1].

Part III: The Future

In the Introduction of this study it was indicated that an examination of the juridical boundaries of the fourth vow was not only timely but necessary, owing to the wide divergence of understanding among Jesuits, and others, regarding its meaning. It was judged that a proper understanding of the vow is linked inextricably to an appreciation of the historical situation in which it emerged and developed. This section, which addresses the future of the fourth vow, will begin by identifying several influences which already are shaping that future, and which undoubtedly will affect the way in which Jesuits understand and live out their mission. It will then propose several specific adaptations which may be anticipated regarding the development and future application of the fourth vow.

The Society was founded, and the Jesuit expression of the fourth vow was conceived at a time when the world was undergoing radical paradigm shifts. The “New World” just had been discovered, significantly affecting the understanding of world resources, economics, development and international relationships. The authority of the Church was often a decisive factor in granting the licence to explore—determining who could explore, and where, in fact it was held that, “because of their relationship with the papacy, for the sovereigns of the Iberian peninsula, evangelization constituted the justification and juridical guarantee of the conquest.”¹³¹ Not only did new frontiers for mission become available, but the very notion of evangelization itself had just seen the shift from the Crusades, the extension of Christianity through violent means, to mission, the extension of Christianity through peaceful means.¹³² So as to recognize if new converts were “backsliding” into their old religious ways, primal religions were carefully

¹³¹ “Ma, nella situazione dei rapporti tra il papato e i sovrani iberici, sono le autorità politiche a occuparsi della evangelizzazione, perché questa costitorisce la giustificazione e la garanzia giuridica della conquista” (A. PROSPERI, “L’Europa cristiana e il mondo: alle origini dell’idea di missione,” [= PROSPERI], in *Dimensioni e problemi della ricerca storica*, 2 (1992), p. 194.

¹³² See PROSPERI, p. 191.

studied, marking the beginnings of religious anthropology as a discipline; and, influenced by the same line of thinking, to protect the faith, the authority of the Church found a new expression through the inquisition.¹³³ The effects of change were everywhere—from the development of the printing press, to the beginnings of the Reformation, to the extraordinary reforming Council of Trent—and within this atmosphere the Society of Jesus, with mission at its heart, was born and grew.

It would be facile and simplistic to say that parallels could be drawn between the founding years of the Society and the present day. But it would also be true. The world finds itself once again facing radical paradigm shifts. Some authors have suggested that the nation-state is being replaced by a global service society where information is power, international communications take only seconds and profit not people is too often the motive. The problems of refugees, human rights violations, environmental disasters, international economics and ethnic wars cry out for the development of new strategies for peace and justice that, while respecting cultural and state lines, cross them to that which is more fundamental—that which we all share, that which is human.

The contemporary Western outlook on reality can be loosely characterized as rationalist, secular, scientific and quantitative, what some writers have called 'the Enlightenment model.' These characteristics have their strengths: they have been instrumental in bringing most of the West to levels of economic, social, technological and physical well-being that were unimaginable a few generations ago. Unchecked, however, they have also bred frightening levels of individualism, materialism, conspicuous consumption and social alienation.¹³⁴

The effects of attitudes of anti-authoritarianism also have been felt, especially by governments and institutions which often are viewed with suspicion and distrust. And it is only now being acknowledged by politicians and professors that secular humanism has run its course, and that technology with its "priest-scientists" will not save the world.

¹³³ See PROSPERI, p. 206 ff.

¹³⁴ P. BEEMANS, in the forward to W. RYAN, *Culture, Spirituality and Economic Development: Opening a Dialogue*, Ottawa, International Development Research Centre, 1995, p. vi.

The Church, and the Society of Jesus within it, have not been immune to these difficult challenges which have created the urgent need for yet another shift in the understanding of the concept of mission, one with a new fervour, new approaches and new expressions. After the Second Vatican Council—the most dramatic since the Council of Trent—and especially after the 1974 Synod on evangelization, Paul VI taught us that “the split between the Gospel and culture is without a doubt the drama of our time, just as it was of other times”:¹³⁵

All this could be expressed in the following words: what matters is to evangelize man's culture and cultures (not in a purely decorative way as it were by applying a thin veneer, but in a vital way, in depth and right to their very roots), in the wide and rich sense which these terms have in *Gaudium et spes*, always taking the person as one's starting-point and always coming back to the relationships of people among themselves and with God.¹³⁶

This relationship between faith and culture or cultures in the process of evangelization was expressed by the 1977 Synod on catechesis in the word “inculturation.” But it is clear that this mission does not take place only within cultures which do not know Christ, it is also imperative that re-evangelization occur in cultures which are now critical of the Gospel, indifferent to it, or simply unbelieving. This “new evangelization” has been a central theme and concern of Pope John Paul II.

Elements of these trends were already becoming clear during the closing days of the Second Vatican Council when Pope Paul VI spoke to the Jesuit Thirty-First General Congregation asking that the superior general direct the apostolates of the Society to the task of confronting atheism. In its Decree 3, “The Task of the Society Regarding Atheism,” the Congregation wrote:

All superiors should see to it that our apostolate is constantly adapted to this end. It is especially recommended to Father General that [...] he direct the

¹³⁵ *Evangelii nuntiandi*, no. 20.

¹³⁶ *Evangelii nuntiandi*, no. 20. The *Gaudium et spes* reference is no. 53, in *AAS*, 58 (1966), p. 1075.

entire apostolate of the Society in carrying out that mission as effectively as possible.¹³⁷

Since that time the Society has further clarified the understanding of its mission:

The Thirty-Second General Congregation (1974) defined "the service of the faith of which the promotion of justice is an absolute requirement" as the current expression of our charism. In keeping with the *Exercises* and the *Constitutions*, this is the Ignatian orientation of our mission today as an apostolic body. The Thirty-Third General Congregation (1983) confirmed this point ten years later and emphasised two dimensions. The first is that this mission is to be carried out from the standpoint of the evangelical option for the poor. In this the Society takes up the central idea of Jesus' mission. The second dimension is that this mission is defined as **integral evangelization**, which the Society has come to understand in a deeper way.¹³⁸

The Thirty-Fourth General Congregation (1995), not only reaffirmed this direction of the mission of the Society, but in its first decree, entitled, "Our Mission," it said:

Thus the aim of our mission (*the service of faith*) and its integrating principle (*faith directed towards the justice of the Kingdom*) are dynamically related to the *inculturated proclamation of the Gospel* and *dialogue with other religious traditions* as integral dimensions of evangelization.¹³⁹

The document went on to make an even bolder statement of the understanding of this mission:

Today we realise clearly:

No service of faith without
promotion of justice
entry into cultures
openness to other religious experiences.

No promotion of justice without

¹³⁷ GC 31, D. 3, no. 17.

¹³⁸ "Integral Evangelization and Inculturation," (= Integral Evangelization), a working paper of the Commission on Evangelization and Inculturation of the Thirty-Fourth General Congregation, in *Promotio iustitiae*, no. 60, May, 1995, Rome, no. 1, p. 45. The Society has expressed its understanding of integral evangelization in the following way: "Integral evangelization tries to embrace the whole of human reality: the individual, the social and cultural; the spiritual and material. For evangelization unfolds in the concrete reality of very different and numerous cultural groups. So we call 'inculturation' that process of evangelization which integrates faith and justice in a concrete culture. This is not a theological or pastoral fad, but the irreplaceable core of an authentic evangelization" (ibid., no. 3).

¹³⁹ *The Interim Documents of General Congregation 34 of the Society of Jesus*, (= GC 34), D. 1, "Our Mission"; 1.1., "Servants of Christ's Mission," no. 15.

communicating faith
transforming cultures
collaboration with other traditions.

No inculturation without
communicating faith with others
dialogue with other traditions
commitment to justice.

No dialogue without
sharing faith with others
evaluating cultures
concern for justice.¹⁴⁰

The document characterizes the mission of the Society in the final sentence of the decree: “in the light of these reflections, we can now say of our contemporary mission that *the faith that does justice* is, inseparably, *the faith that engages other traditions in dialogue*, and *the faith that evangelizes culture*.”¹⁴¹

It is reasonable to project that the Society’s appropriation of this understanding of mission in the context of the present world ultimately will affect not only the missions Jesuits receive, but also the way in which they receive them and from whom. It has been said that, as an international apostolic body, the Society is called to work on projects conceived globally and implemented locally and culturally.¹⁴² Already creative and organizational tensions are being experienced, since many apostolic undertakings which are consistent with the above directives often span geographical areas which are larger by far than a “province” of the Society. Presently, juridical authority in the Society is held by the superior general, the provincials and the local superiors. “Inter-provincial” and “supra-provincial” collaboration are becoming an absolute requirement for effective ministry. While such demands are presently being addressed *ad experimentum*, in

¹⁴⁰ Ibid., no. 19 (the format of the quotation is the one used in the document).

¹⁴¹ Ibid., no. 21.

¹⁴² Integral Evangelization, no 35.1, p. 52.

the future it would not be surprising to see the emergence of “super-provincials” or “supra-provincials” with juridical authority.

This broadening of the understanding of mission is entirely consistent with the original inspiration of the Society which was conceived as one, international, apostolic body at the service of the entire Church under the guidance of the Universal Pastor, the Vicar of Christ. The guiding apostolic principle as defined by Ignatius remains as viable today as it was then—the more universal the service the more it is divine. Individual Jesuits may expect that future missions will demand more freedom and availability, more agility and mobility, both intellectual and physical, than most have experienced in recent years. In the minds of Jesuits these are elements which are especially required by and identified with the full and proper expression of the fourth vow, which itself is at the heart of the determination of the Society’s mission and apostolate. It may be that the demands of future missions will restore a vitality to the living out of the fourth vow which has not been seen since the founding years.

Such apostolic undertakings also require a redirection of resources other than personnel. The Society, as in many parts of the Church, has in recent years experienced a decline in vocations.¹⁴³ This has necessitated some creativity in the maintenance of so many institutions under the care of the Society, such as the recent shift in nomenclature from “Jesuit institutions” to “Ignatian institutions.”¹⁴⁴ In the future it may be that Jesuits could expect to receive fewer missions to stable institutions and residences, and instead, see a return to more itinerant ministry,

¹⁴³ Recent documentation from the Jesuit curia in Rome predicts that numbers in the Society should stabilize around the year 2025 with approximately 14,000 Jesuits.

¹⁴⁴ “Ignatian institution” was a term coined, (I believe) by the Jesuit Secondary Education Association in the United States, to refer to apostolates which may operate under the guidance, or at least the inspiration of the Society, but which may have no full-time Jesuit involved other than as a chaplain, or on the Board of Directors. This shift away from “power administration” occurred, not only by necessity—as a result of declining numbers—but also as a positive expression of the movement towards what variously has been called collaboration, partnership in ministry with the Laity, or, as the Document of the Thirty-Fourth General Congregation names it, “Cooperation with the Laity in Mission” (D. 3.3).

possibly within a regional Church grouping, a culture, or at the service of the world within a grouping of experts who share an area of specialization.

In 1990, G. E. Carter, former cardinal archbishop of Toronto, addressed a gathering of some 200 Canadian Jesuits and told them that the first one thousand years of the Church were dedicated to the founding of the diocese, the setting up of local Churches; the second millennium, was the age of the religious orders, in that the greatest contributions to the development of the Church came from them; but this third millennium, he said, is the millennium of the laity, and it is upon us already. During the informal question period which followed his presentation, he said, "the best advice I can give to you Jesuits is to direct all your energies, apostolates and especially your educational resources to prepare and assist the laity to make their contribution to the development of the Church."¹⁴⁵ Over the last number of years the laity have been taking an ever more active role in the ministry of the Church. The document on "Cooperation with the Laity in Mission," from the Thirty-Fourth General Congregation begins with: "A reading of the signs of the times since the Second Vatican Council shows unmistakably that the Church of the next millennium will be called the 'Church of the Laity.'" ¹⁴⁶ The same document, in its closing paragraph says that, "collaboration with the laity is both a constitutive element of our way of proceeding and a grace calling for personal, communal and institutional renewal."¹⁴⁷

In the future this movement or developing trend may have three foreseeable consequences. The first, obviously, concerns the way in which Jesuits undertake missions, not only collaborating with laity in apostolates of the Society, but partnering with, encouraging, supporting and

¹⁴⁵ The substance of the presentation can be found in *Companions of Jesus: Pilgrims with Ignatius*, Toronto, The Canadian Institute of Jesuit Studies, J. MONET, ed., 1991, pp. 26-34. The quotation is from notes taken at the presentation.

¹⁴⁶ GC 34, D. 3.3, no. 1.

¹⁴⁷ *Ibid.*, no. 25. Earlier it was pointed out that even the revised Code of Canon Law accounts for lay *cooperation* in the exercise of ecclesial governance.

contributing to lay apostolic associations, lay movements, and other expressions of lay ministry, especially those which relate to the Society and its mission. The second concerns the contributions of L. Cada, mentioned in Chapter One.¹⁴⁸ He says that the history of religious life can be divided into five eras or ages, each with its own identifiable dominant image of religious life: the “Age of the Desert,” the “Age of Monasticism,” the “Age of the Mendicants,” the “Age of the Apostolic Orders” and the “Age of the Teaching Congregations.”¹⁴⁹ While it is not yet clear what dominant image of religious life will shape the next age or era, there is no doubt that the “Church of the Laity” will have a significant, if not determining, impact on its definition. The Society of Jesus has shown itself to be adaptable. Formed as an apostolic order, defined by Pius V as a mendicant order,¹⁵⁰ it is most often perceived—with good reason, especially after its restoration—as a teaching order, but always with the fourth vow at the heart of its essential identity. Whatever the shape of the coming age of religious life, the structures of the Society, which were fashioned and crafted with mission at their core and the fourth vow as the cornerstone, should allow for a smooth and effective transition to the missions defined by the next era of the Church.

The third implication of these developing trends or movements is a far more complicated and delicate matter, and requires some historical explanation.¹⁵¹ During the Thirty-First General

¹⁴⁸ See Appendix I.

¹⁴⁹ L. CADA, et al., *Shaping the Coming Age of Religious Life*, Whitinsville, Mass., Affirmation Books, 1979, second edition, 1985, p. 13 ff.

¹⁵⁰ “[...] on our own initiative [...] and from certain knowledge, by these presents We on Our apostolic authority ordain, will, and declare for all time that this Society and its Superior General, and each of its members have been, are, and shall be Mendicants in fact and not fictitiously” (PIUS V, *Cum indefessae*, 1571, Inst. I., 47b; see VALJERO, *De legibus*, 5, 36. 6, in Appendix VI).

¹⁵¹ Given the limited scope of this study it is not possible to review even adequately all of the circumstances and considerations which such a review would require. This task must be left to future historians. Many relevant and even key letters and documents are buried in secret archives, and will not be available for years. And many of the participants themselves vary on the perception, let alone the interpretation of what actually took place. The aim here is to highlight various elements only from selected moments of the discussion, so as to broadly indicate influences and concerns which may affect the future.

Congregation,¹⁵² one of the most lively discussions concerned the distinction of grades which exists in the Society.¹⁵³

How strong the feeling was among some may perhaps be captured by the account of part of a speech by one of the Indian delegates in the second session: 'If non-Christians, inspired by human motives, were able to make such a gesture [the abolition of caste], how is it that we, who are Christians and who ought to be inspired by supernatural motives would not dare to abolish the caste system that prevails in the Society?' He then shouted, 'Ego dico ABOLENTA EST ista distinctio graduum,' and applause followed.

Earlier in the first session, a not untypical remark along the same line held that 'we must abolish this title [of grades] which divides the Society into classes, and we must do it immediately.'¹⁵⁴

But the issue, as its development through the years revealed, was not nearly so simple as was first thought, nor could it simply be solved by the abolition of the grades within the Society. At the Thirty-First General Congregation,

Some postulata called for an abolition, pure and simple, of the distinction of grades. Others pronounced the distinction inopportune; others wrote heatedly against the norms in use for profession. [...] Finally, in the first session, by a series of votes, the congregation decided, first, not to ask that the grades be abolished; second, to revise the norms for profession; third, to recommend to the General that he set up a commission to go into the whole question in depth, including the advantages and disadvantages that would accrue if all formed members of the Society, both priests and brothers, would receive the solemn profession. [...] on October 7 the Congregation decided again that the grade of spiritual coadjutor should not be suppressed here and now and that *definitores* should not be appointed to decide the matter definitively; instead, right after the

¹⁵² The first session was held from 7 May to 15 July, 1965; the second session from 8 September to 17 November, 1966.

¹⁵³ Written sources on the events of the General Congregations are limited in number and in scope. The most complete history available is from J. PADBERG, *Together as a Companionship: A History of the Thirty-First, Thirty-Second, and Thirty-Third General Congregations of the Society of Jesus*, (= PADBERG), Saint Louis, *IJS*, 1994, viii, 145 p., and the references included in his work; and T. CLANCY, *An Introduction to Jesuit Life: The Constitutions and History through 435 years*, Saint Louis, *IJS*, 1976, especially his Chapter 10: "Today and Tomorrow." The best sources of information are, of course, the participants themselves; however, because of necessary discretion and the rules regarding secrecy which are imposed on the participants, it may be presumed that only the broad strokes of the events may be discerned. It must also be acknowledged, as Padberg points out, that a full history is not possible, because "the events are too recent" (PADBERG, p. vii).

¹⁵⁴ PADBERG, p. 10, note 19. He refers to *WZ*, 98, no. 1 [Winter 1969], p. 25; and *WZ*, 'Letters,' 96, no. 2 [Spring 1967], p. 169, for references to the quotations.

Congregation experts would go into the whole question of the grade of profession and let the next Congregation deal with it.¹⁵⁵

The one statement that the Congregation did make at this time was that the vocation of all Jesuits is a single vocation.¹⁵⁶

The issue returned to the Thirty-Second General Congregation, and, predictably, it figured prominently among the *postulata*. Ten days prior to the commencement of the Congregation, the superior general delivered to the pope a copy of the *postulata*, and also a memorandum containing the topics which would probably be addressed by the Congregation. "Among those topics, the general had noted for the pope the possibility that the Congregation might want to request a change in the Institute of the Society so that nonpriests could also take the fourth vow."¹⁵⁷ However, a letter from the papal Secretary of State, Cardinal Villot, said:

[...] that the pope had not failed to consider the possibility that a proposal might be advanced to extend to all the members of the Society the fourth vow of special obedience to the Supreme Pontiff 'with regard to missions. [...] The Supreme Pontiff [...] desires to let you know that such a change in the light of more

¹⁵⁵ PADBERG, pp. 9-10.

¹⁵⁶ See PADBERG, p. 64. "[...] all members of the Society, even at the cost of a complete change of mind, may be truly of 'one heart and one mind,' and all enjoying one and the same vocation apart from the priesthood, may together and in the spirit of our founder dedicate themselves totally to the mission of the Church. [...] But beyond that, the brothers have a full share in the special apostolic nature of the Society, which pertains to all its members. For that reason their activity in the Society is to be defined by the same principles which define the apostolic service of the whole Society, namely, through its attention to the greater service of God and the universal good" (GC 31, D. 7. 2.).

¹⁵⁷ PADBERG, p. 47. The "Institute of the Society" refers to the *Formula of the Institute*, or the *rule* of the Society which requires papal approval for any changes. The legislation requires that one be a priest to profess the fourth vow (for references see VALERO, *De legibus*, 2.1, 6. 1, in Appendix VI). Related issues have arisen in other fora. Some institutes in the Church, notably the Franciscans, in discussion among themselves and with the Holy See have expressed their desire to see brothers hold office, including the positions of minister provincial and minister general. The Holy See has not been favourable towards the notion. In selected cases, however, exceptions have been granted. For example, the Capuchin Brothers, in Canada, elected a brother as their minister provincial and approval was given on the condition that there be a priest associated with the office to undertake any actions requiring the power of jurisdiction. And the Missionary Oblates of Mary Immaculate received approval for one brother to be named superior of their Southern Illinois District in the US, and another to be named a local superior in the Most Holy Rosary Province of Canada (for the texts of the indulgences to the Oblates see W. WOESTMAN, *The Missionary Oblates of Mary Immaculate: A Clerical Religious Congregation with Brothers*, Ottawa, Faculty of Canon Law, 1995, pp. 287-288).

careful examination seems to present grave difficulties which would impede the approval necessary on the part of the Holy See.¹⁵⁸

As Padberg points out,¹⁵⁹ the Congregation was faced with trying to ascertain the implications of the circumstances in which they found themselves. Fifty-four out of eighty-five Province Congregations had sent in official *postulata* on the matter.¹⁶⁰ They had received sixty-five official *postulata* regarding the issue of grades, forty-one asking for the abolition of the distinction of grades—a clear mandate from the Society itself. In its discussion the Congregation understood that a consideration of grades, abolition of the distinction on grades and extension of the fourth vow, though related, were not exactly the same thing. What the Congregation did not correctly understand was the intention of the Holy See regarding the issue. “For the moment, however, the Congregation, faced with a green light from the Society and what it saw as an amber light from the Holy See, proceeded with caution. Later it learned that the Vatican light had been red.”¹⁶¹

At the Congregation, when the issue was confronted, a series of “straw votes” were taken to help determine the direction in which the Congregation wished to move on the issue.

The first issue on which a straw vote was taken inquired whether it was the will of the Congregation, in the light of the reasons presented and the very nature of the matter under discussion, to abolish grades in such a wise that all formed Jesuits would be able to pronounce the same four vows without changing the sacerdotal character of the Society. The second question asked whether it was the will of the Congregation so to act even while taking into account the divergent views presented and the circumstances noted in the letter from the Secretary of State. The third question asked whether it was the will of the Congregation that a ‘representation’ of the mind of the Congregation should be made to the pope. By a majority so very large that it surprised even the advocates of change, these votes indicated that delegates were presently inclined to favour simply abolishing

¹⁵⁸ PADBERG, p. 48.

¹⁵⁹ PADBERG, pp. 47–49.

¹⁶⁰ See PADBERG, p. 63.

¹⁶¹ PADBERG, p. 49.

grades in the Society. On each of these questions, the vote was more than two-thirds affirmative. This produced a strong effect. As one of the minority was reported to have said privately, 'This vote has made me think, far more than all the previous arguments. I shall have to rethink all my ways of looking at things.'¹⁶²

The results of the straw vote were very upsetting to Paul VI, and he made it absolutely clear that for the universal good of the Church he did not want the Society to make any change at this time regarding the fourth vow.¹⁶³ John Paul II repeated this injunction in his response to the superior general's letter which informed the pope of the Society's intention to convoke the Thirty-Fourth General Congregation.

While one must be very cautious not to overstate nor over-simplify a complicated and delicate matter which has produced so many strong words and reactions, it is reasonable to believe that experience and the passage of time will lead to more clarity on the issue. However, several converging trends and developments already have been identified. There has been a movement from the ecclesiology of perfect society to an ecclesiology of *communio*, together with a shift from jurisdiction to power of governance. The New Code gave juridical recognition to lay cooperation in the exercise of ecclesial governance, and the Society has legislatively affirmed that *all* its members share the same vocation and apostolate. The Society understands and the long time praxis of the Holy See confirms that the "special obedience" expressed most clearly in the fourth vow, but also through the third vow shown *first* to the Sovereign Pontiff, means that it is

¹⁶² PADBERG, pp. 65-66. Padberg goes on to say: "Abolition of grades, of course, was not the only option, so further straw votes followed on other possibilities. Even if grades were to continue to exist, very strong majorities favoured these further possibilities: removing the present conditionality of the coadjutors' vows, taking steps to increase coadjutor participation in province congregations and possibly in general congregations [a proposal which was passed at the Thirty-Fourth General Congregation, and subsequently approved by the pope], eliminating distinctions between professed and spiritual coadjutors, and revising the criteria for profession of four vows [also accomplished at the Thirty-Fourth General Congregation]. However, lesser but still, large majorities showed a willingness, with grades still existent, to abolish the one grade of spiritual coadjutor, and also showed a willingness at least to abolish the grade of spiritual coadjutor and to permit both groups of coadjutors to take three solemn vows. A proposal to have all members become formed coadjutors first, with some of them taking solemn vows later on, lost. And finally, down to defeat by an overwhelming margin went the proposal that the present Congregation do nothing at all about grades" (id., p. 66).

¹⁶³ For the best rendition yet available of these events see PADBERG, pp. 35-36; 38-39; 47-49; 62-73; 88-91.

the whole Society which stands in a special relationship with the Vicar of Christ. There has been a decline in the number of religious, the Church is standing on the brink of the “Age of the Laity” and it is anticipated that there will be a change in “the dominant image of religious life.” Given all these influences, it is possible, and perhaps even likely as these trends mature, that at some time in the future all members of the Society may be invited to profess the fourth vow.

Summary

This Chapter resolves the question fundamental to this study: What is the matter of strict juridical obligation incurred by one who professes the fourth vow in the Society of Jesus? In the course of the investigation, however, several other related questions arose which also required resolution: Is there a difference between the obedience of the professed of four vows and the obedience of other members of the Society? What is the relationship between the two vows of obedience? To address these questions it was necessary to investigate the nature, the source and the relationship of the authority of the pope and of the superior general over the professed, and to consider whether there are juridical limits which affect either.

Most of the early discussion regarding the vow followed from the objection of Cardinal Ghinucci, its first critic, who felt that the fourth vow was superfluous since it added nothing to the third vow which already required obedience to the pope. But his difficulties were satisfied when the three motivations for the vow were added to the *Formula of the Institute*. Others, perhaps best represented by Suarez, refined Ghinucci's opinion saying that in general the third vow covered all aspects of the commitment of obedience. They declared, however, that the fourth vow not only highlighted and focused the essential missionary end of the Society, it legitimately amplified the commitment of the third vow with a greater intensity, and extended that obligation as well. The *Constitutions* specify the matter of juridical obligation, over and above the requirements of the third vow, to which the professed of four vows are bound: the fourth vow requires that one is not to seek, but to accept immediately and without argument missions from the pope, even to go to pagan countries, without requesting provisions for the journey, nor causing a request for anything temporal to be made.

In recent years the question has reappeared, but with a different point of emphasis. The contemporary argument proposes that those with the mission vow promise all their obedience *circa missiones*, even of their third vow, directly to the pope and not also to the superior of the

Society; therefore, the power of sending belongs to the pope. The superior of the Society can send a man on a mission, but, it is suggested, only by virtue of the mission faculty which the pope habitually delegates to the general (who can subdelegate it). This would mean that *circa missiones* the superior general could act only with ordinary vicarious power. Thus, it is argued, there are two lines of authority in the Society, one from the superior general and one from the pope. However, this study finds that these conclusions are inconsistent with: the historical circumstances related to the founding of the Society; the intention of the founders; an accurate interpretation of the universal law, especially since the revision of the Code of Canon Law; the proper law of the Society; the long time praxis of the Holy See on the matter; and the lived experience of Jesuits.

Even before the founding of the Society the companions had committed themselves to the substance of what became the fourth vow in the Society of Jesus. The formal approval of the Society as an institute in the Church, however, established a new juridical relationship with the Holy See, one generally consistent with the relationship held by other institutes in the Church. The Church, which receives its authority from God, confers on an institute the power to govern itself within the limits set by the universal law and the institute's proper law. An examination of the *Constitutions*, especially the vow formula, in the light of the universal law reveals that it is reasonable to understand that the fullness of obedience is offered to the superior general through the third vow. The fourth vow, even though it expresses a "special" obedience to the pope, does not compromise the legitimate authority of the superior general over the institute. Parts VII and IX of the *Constitutions* clearly point out that the superior general has the authority to send professed Jesuits on missions. The source of the superior general's authority rests not in the faculty, but in the fact that he is the supreme moderator of an institute specifically erected for mission. Ignatius requested and was granted the mission faculty not to obtain a power which he believed the superior did not possess, but, because a doubt could be raised about the matter,

Ignatius desired to have the Holy See recognize and confirm the power which he believed he did already hold. And even if doubt were to exist still, it is understood that by its conveyance to the Society in the bull *Licet debitum*, the power of the superior to mission became part of the corpus of the proper law of the Society, which itself was reviewed and approved by competent authority. Nadal, who knew the mind of Ignatius as well as any of the first companions, confirmed this understanding. Thus the superior general can send a man on a mission by virtue of his ordinary proper power. This way of proceeding is also consistent with the long time praxis of the Holy See.

The Jesuit mission vow is a direct expression of the special end or goal of the Society; it belongs to the Society's essential nature and character, and Ignatius himself referred to the fourth vow as the first principle and foundation of the Society. From the beginning the vow was motivated not only nor even first to show greater devotion in obedience to the Apostolic See. But more importantly it was pastorally motivated—it helped to protect the Jesuits' freedom and indifference to undertake missions to serve the *more* universal good, the *greater* glory of God, by having the Vicar of Christ, the Universal Pastor, participate in the selection of the Society's ministry. This "special" relationship between the Society and the Holy See is expressed first and most clearly through the "special" obedience of the professed in their fourth vow, but also through the spirit and intention of the entire Society, expressed through the third vow of obedience shown *first* to the Sovereign Pontiff. The experience and the legislation of the Society recognizes that, while protecting its sacerdotal nature, all members enter the same Society and share the same apostolate. Although some maximalists have suggested that the pope can impose doctrinal missions by virtue of the mission vow, examination has indicated that matter which is doctrinal is not part of the proper object of the fourth vow.

The spirit and intention of the Second Vatican Council together with the guiding principles for the revision of the Code of Canon Law resulted in several important developments

in the understanding of the lines of authority in the Church. The shift from an ecclesiology of perfect society to an ecclesiology of *communio*, the principle of subsidiarity, the rethinking of the notion of faculty and the shift from “jurisdiction” to “power of governance,” all serve to help interpret properly the “special” relationship between the Society and the Holy See. The Church’s desire to protect the balance between the *interna*i and the *external* hierarchy of institutes and to preserve their discipline and patrimony is addressed by canon 586 §1 which acknowledges for those institutes a rightful autonomy of life, and especially of governance. When the superior sends a Jesuit on a mission, the Jesuit owes all of his obedience to the superior. The pope is always free to entrust special missions to the Society, and even to individual professed Jesuits, not only by virtue of canon 590, but also by virtue of the special relationship which exists between the Society and the Holy See. A papal mission does not compromise the superior general’s internal power of governance, but by analogy to the pope’s relationship with bishops (cc. 331, 333 §1), such a papal intervention can be understood to strengthen and safeguard not only the proper, ordinary and immediate power of the superior general, but also the essential nature of the Society itself.

A proper understanding of the fourth vow is linked inextricably to the historical situation in which it is lived. Several converging influences and developing trends have been identified which, no doubt, will affect the way in which the mission vow is perceived and practiced in the future. Paul VI discerned that the split between the Gospel and culture is the drama of our time, and the “new evangelization” has been a major concern of John Paul II. The Thirty-Fourth General Congregation said that “we can now say of our contemporary mission that *the faith that does justice* is, inseparably, *the faith that engages other traditions in dialogue*, and *the faith that evangelizes culture*.” The Society as an international apostolic body is faced more often today than in the past with the challenge to respond to missions which span large geographical territories. It may be anticipated that declining numbers in the Society, the Church on the brink

of the “Age of the Laity” and necessary developments in the method and manner of institutional apostolic undertakings, will also affect the mission of the Society. One could expect to see the emergence of “super” and “supra” provincials with juridical authority, a return to more itinerant ministry with fewer missions to institutions as they have been understood traditionally, and more effective cooperation with the laity in mission. And, finally, given the juridical recognition of lay cooperation in the exercise of ecclesial governance, the legislative acknowledgement by the Society that all Jesuits share the same mission and ministry and the long time praxis of the Holy See regarding the way missions are entrusted to the Society, it may be in the future that all Jesuits will be invited to profess the fourth vow.

CONCLUSION

What is the matter of strict juridical obligation incurred by one who professes the fourth vow in the Society of Jesus: special obedience to the Sovereign Pontiff in regard to the missions? This dissertation was undertaken to explore this question from the canonico-historical point of view. Several concerns motivated, shaped and influenced this study. The call of the Second Vatican Council for the renewal of religious life in the Church motivated most institutes to research their beginnings and roots so as better to respond to the needs of a changing world; and the revision of the Code of Canon Law required the renewal of the proper law of institutes. More specific to the Society of Jesus, clarification of the fourth vow became necessary when it was found that even Jesuits held widely diverse opinions regarding the understanding and scope of the vow. One has a right to know the meaning of the vow one professes. The principles for the interpretation of a juridical text were observed, especially as expressed in canons 16, 17 and 19 of the Code of Canon Law.

The study began with the emergence of obedience as it was understood and developed by various religious communities which grew in the Church. It moved through a consideration of the life of Ignatius, the birth of the *Spiritual Exercises*, and the events which led to the establishment of the Society of Jesus. The significant founding documents of the Society were examined, especially *The Formula of the Institute—the Rule of the Society*—and the more detailed statutes and determinations in *The Constitutions of the Society of Jesus*. Tenets observed by the Church regarding the principles of limitation and interpretation of a vow were recognized, and a review of the historical development of the juridical understanding of the fourth vow was

undertaken. The canonical questions were then identified and addressed and, finally, possible future developments were suggested.

In the course of this study it became clear that to answer the question fundamental to this thesis regarding the limits of the fourth vow it would be necessary to address several related questions as well: Is there a difference between the obedience of the professed of four vows and the obedience of other members of the Society? What is the relationship between the two vows of obedience? What is the nature, the source and the relationship of the authority of the pope and of the superior general over the professed, and are there juridical limits which affect either?

It was found that the principles of interpretation of a juridical text indicate that the proper interpretation of a vow requires a good understanding of the influences working in the life of the founder, the circumstances which led to the establishment of the institute, and a critical examination of the expression which the institute is given in its founding documents, approved by competent authority. A study of the life of Ignatius revealed that from the time of his sick-bed conversion, he was set on a life-long pilgrimage to seek and to do the will of God. In his "primitive church" at Manresa he learned to pray, and his pilgrimage became a mission, "to help souls." After his expulsion from the Holy Land he set his mind to studies and gathered some companions who shared his resolve. Their common desire was formalized in the Montmartre vows where the notion was first expressed that the pope would be best placed to send them where they could most benefit their neighbour for the glory of God. Eventually, after the experience of apostolic works and ordination, they turned their sights to Rome where they distinguished themselves with outstanding works of charity.

Even after Paul III accepted their offer to be of service to the pope and to the Church, the companions did not specifically intend to begin a new religious institute. It was only when they were about to be separated—sent on missions—that, at *The Deliberations of the First Fathers*, they decided to vow obedience to one of their own number and seek approval for the

foundation of the Society of Jesus. Chief among their concerns was that anyone who entered the Society should make a special vow of obedience to the Sovereign Pontiff, offering to go anywhere he sent them for the help of souls.

A review, especially of the early documents of the Society, revealed that the word "mission" consistently kept its meaning of "sending." O'Malley pointed out that the Spanish *misiones* is used as the equivalent for the Latin *peregrinationes*, and that the best English translation is the word "journey," but understood as bearing with it the idea of pilgrimage. Nadal confirmed and developed this understanding where he said that "[...] the most characteristic and most perfect house of the Society is the journeys of the professed [...]."

Consistent with the expectations of the Church and the understanding of evangelical obedience expressed in other institutes, by virtue of the third vow all members of the Society owe the full amplitude of their obedience to the superior general. But Ignatius had the desire to guard the mission he and his companions had received from God, "to help souls." Given his world-view, his understanding of authority and especially his unique spirituality, Ignatius, who believed that the more universal the good the more it is divine, saw that this mission could be protected by the fourth vow. He understood that "[...] all of Christ's faithful are subject to the Roman Pontiff as their head and as the Vicar of Christ [...] [4], however, he wanted to amplify that commitment. The mission vow was expressly motivated so that the companions could show greater devotion in obedience to the Apostolic See, and thus, not only help to ensure the most universal good, but also show their special willingness to be of service to the Supreme Pontiff and the universal Church. Through the vow the companions could show greater humility, mortification and abnegation of their own wills, and thus help protect their freedom and indifference to be available for mission. But, most important in the practical mind of Ignatius, the vow would help guarantee the surer direction of the Holy Spirit in the choice of apostolic

missions by having the Universal Pastor, the Vicar of Christ, participate in their selection. It was O'Malley who best pointed out that the vow was first and foremost pastorally motivated.

It was a pastoral motivation as well which prompted Ignatius to admit coadjutors into the Society. Gerhartz indicated that virtually all the structures of the Society were developed with its specific mission character in mind: candidates are accepted into the Society and formed with the mission vow in view; interior indifference and freedom to undertake mission is sought through the *Spiritual Exercises*; so as to be free for mission members are not required to regularly hold choir or sing Masses and offices [586]; so as "[...] to be ready at any hour to go [...]" members are not to take a "curacy of souls" or commit themselves as regular chaplains or spiritual directors [588]; members are not to take on perpetual Mass obligations [589]; they are not to accept dignities nor are they to ambition for positions "[...] to avoid having the Society deprived of the men who are necessary for its purpose" [817]; and even the poverty of the Society is understood apostolically—best seen where one sent on a mission should not ask for any material help. The coadjutors entered the same Society with the same structures, identity, apostolate and goals which guided the lives of the professed. Thus, congruous with the intention and desire expressed through the fourth vow, the third vow in the Society is to be shown *first* to the Sovereign Pontiff. This effectively places the entire Society in a special relationship with the Supreme Pontiff.

It was discovered that the *virtue* of obedience, its symbolic character, should be expansive and unlimited; but that the juridical obligation of a vow is circumscribed by certain limits. Many of these limits were first defined by Bernard of Clairvaux who established that the rights and obligations of both the monk who makes the profession and the superior who gives the command are constrained by the nature of the monastic profession which is the measure of obedience. It had already been established in the tradition that one is not bound to obey a command which is contrary to the gospel or to the law of God. Bernard added that one cannot be compelled to act

against conscience. He seemed to anticipate a later age when he spoke of a vow almost as though it were a contract, the terms defined and measured by the profession which is understood according to the rule of the institute. The Apostolic Signatura confirmed this, and indicated that one cannot be held to a strict obligation in matters which are *supra* (above), *contra* (against) or *infra* (below) the law.

In the last Chapter it was found that the early interpreters of the vow were not in error. They declared, and it is the primary conclusion of this study, that the fourth vow is to be understood as follows: the vow highlights and focuses the essential missionary end of the Society; it legitimately amplifies the commitment of the third vow with a greater intensity and it extends that commitment with elements of obligation not strictly required by the third vow. The *Constitutions* specify the matter of juridical obligation over and above that which is legally required by the third vow: a professed Jesuit is not to seek (directly or indirectly) [606] but to accept immediately [4, 324, 586, 588, etc.] and without excuse [603] missions from the pope, even to go to pagan countries [4, 603], without requesting provisions for the journey, nor causing a request for anything temporal to be made [609]. It is also concluded that doctrinal matters are not part of the proper object of the fourth vow.

The fourth vow is the expression of a desire and a commitment made by the companions even before the founding of the Society. The erection of the institute established a new juridical relationship between the companions and the Holy See by which the universal law and the proper law of the institute, approved by competent authority, confer and protect the legitimate authority of the superior general. The fourth vow, even though it is a special obedience to the pope, does not compromise the ordinary, proper power of the superior general over the institute which he governs. To affirm this understanding and to resolve any doubts which could be raised about the matter, Ignatius requested and was granted the faculty to mission. The source of the general's authority, however, does not rest in the faculty. His authority rests in the fact that he is the

supreme moderator of an institute specifically defined and approved by the Church with mission at the heart of its essential nature and character, with mission as its special end or goal and with mission as its first principle and foundation. This interpretation is confirmed by the aspirations and intentions of the Second Vatican Council and the understanding of authority as it is expressed in the revised Code of Canon Law. By analogy to the pope's relationship with bishops, any personal papal mission can be understood to strengthen and safeguard not only the proper, ordinary and immediate power of the superior general, but also the essential nature of the Society itself.

This study finds that these conclusions are consistent with: the historical circumstances related to the founding of the Society; the intentions of the founders; an accurate interpretation of the universal law, especially since the revision of the Code of Canon law; the proper law of the Society; the long time praxis of the Holy See; and the lived experience of Jesuits. Ignatius exhorts Jesuits that their obedience is to be total, perfect, loving and joyful. Nothing expresses this better or with more feeling than the prayer offering which is made in the "Contemplation to Attain Love," found at the end of the *Spiritual Exercises*, the true heart and soul of the Society, and the source and motivation of all obedience:

Take, Lord, and receive all my liberty, my memory, my understanding, and all my will—all that I have and possess. You, Lord, have given all that to me. I now give it back to you, O Lord. All of it is yours. Dispose of it according to your will. Give me love of yourself along with your grace, for that is enough for me.¹

¹ G. GANSS, *The Spiritual Exercises of Saint Ignatius*, St. Louis, *IJS*, 1992, p. 95.

APPENDIX I

TABLE 1.1: Age of the Desert (200-500)¹

Dominant Image of Religious Life: The ideal of religious life is the holy ascetic, who seeks the perfection of Christ as a solitary or in community with a group of monks. Disciples withdraw into the "desert" and place themselves under the care of a master ascetic, who teaches them the ways of perfection. They live nearby as hermits or gather in cenobia or monasteries under the leadership of the master. The monk prays, mortifies himself, does battle with the devil for the sake of the Church, and spends his life seeking union with Christ.

Second and Third Centuries

| | | |
|-----|----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|
| 100 | 20,000 Christians in the world | Consecrated virgins and widows live a form of religious life within the Christian communities of the early Church during the persecutions. |
| 249 | Persecution of Decius | |
| 251 | Antony born | |
| 271 | Antony withdraws into the desert | |
| 292 | Pachomius born | |

Fourth Century

| | | |
|-----|------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 313 | Edict of Milan | Hermits and cenobites flourish in the Egyptian desert. Various forms of solitary and community religious life spread around eastern rim of the Mediterranean (Palestine, Syria, Cappadocia). First monasteries are founded in the West. |
| 325 | Pachomius founds cenobium | |
| 356 | Antony dies | |
| 357 | Athanasius writes <i>Life of Antony</i> | |
| 360 | Basil founds monastery in Cappadocia | |
| 363 | Martin founds monastery in Gaul | |
| 376 | Melania founds monastery on the Mount of Olives | |
| 389 | Simon the Stylite born | |
| 393 | Augustine founds monastic group in Hippo | |
| 399 | Cassian, disciple of Evagrius, migrates from Egypt to West | |

Fifth Century

| | | |
|-----|-------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 405 | Honoratus founds monastery of Lérins | Religious life continues to expand in the East. While the western half of the Roman Empire crumbles, monastic movement spreads throughout the West (Gaul, Spain, Britain, Ireland, etc.). |
| 410 | Alaric sacks Rome | |
| 415 | Cassian founds monastery in Marsailles | |
| 450 | Celtic monasticism takes root in Ireland | |
| 455 | Vandals sack Rome | |
| 459 | Simon the Stylite dies | |
| 476 | End of the western Roman Empire | |
| 480 | Brigit founds double monastery at Kildare | |

First Turning Point: *Spread of Benedict's Rule*

¹ Appendix I is taken from L. CADA, et al., *Shaping the Coming Age of Religious Life*, Affirmation Books, Whitinsville, Mass, 1979, pp. 18-19; 26-27; 30; 38-39; 43.

APPENDIX I

TABLE 1.2: Age of Monasticism (500-1200)

Dominant Image of Religious Life: Life in a monastery under the discipline of the holy Rule is the ideal of the religious. The daily round of liturgical prayer, work, and contemplation provides a practical setting to pursue the lofty goals of unceasing praise of God and union with Christ. Within the Church and Society, monks and nuns set an example of how deep spirituality can be combined with loving ministry to one's neighbor and dutiful fidelity to the concrete tasks of daily life.

Sixth Century

| | | |
|-----|-----------------------------------------|------------------------------------------------------------------------------------------------------------|
| 515 | Finnian founds Clonard | Rapid expansion of Celtic monasticism in Ireland. Various rules observed in monasteries of Gaul and Italy. |
| 529 | Benedict founds Monte Cassino | |
| 563 | Columba founds Iona | |
| 577 | Lombards destroy Monte Cassino | |
| 591 | Columban founds Luxeuil | |
| 596 | Augustine of Canterbury sent to Britain | |

Seventh and Eighth Centuries

| | | |
|-----|---------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 613 | Columban founds Bobbio | Religious life of North Africa wiped out by Moslem expansion. Missionary journeys of Celtic monks to evangelize Europe and revive learning in the Church. Golden age of Irish monastic Church. Gradual spread of Benedict's Rule to more and more European monasteries and convents. |
| 635 | Bobbio adopts Benedict's Rule | |
| 640 | Aiden founds Lindisfarne | |
| 642 | Arab conquest of Egypt | |
| 664 | Synod of Whitby fuses Celtic and Anglo-Saxon observance | |
| 665 | Luxeuil adopts Benedict's Rule | |
| 717 | Monte Cassino refounded | |
| 735 | Venerable Bede dies at Jarrow | |
| 744 | Boniface founds Fulda | |
| 755 | Chrodegang writes rule for canons | |

Ninth Century

| | | |
|-----|------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 816 | <i>Regula Canonorum</i> of Aix-la-Chapelle | Observance of canons regular is made uniform by spread of the <i>Regula</i> of Aix. Consolidation of Benedict's Rule; virtually all of religious life becomes "Benedictine." |
| 817 | Louis of France decrees that Benedict's Rule be observed throughout Carolingian realms; Benedict of Aniane coordinates this policy | |

Tenth and Eleventh Centuries

| | | |
|------|--------------------|-------------------------------------------------------------------------------------------------|
| 910 | Cluniac reform | Various reforms breathe new life into Benedict's ideal and introduce organizational variations. |
| 1015 | Camaldolese reform | |
| 1084 | Carthusian reform | |
| 1098 | Cistercian reform | |

Twelfth Century

| | | |
|------|-------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1111 | Bernard joins the Cistercians | Canons regular unite into orders, which are a variation of the monastic networks of Cluny and Citeaux. Military orders attempt a new form of religious life which is temporarily successful. |
| 1119 | Templars founded | |
| 1120 | Premonstratensians founded | |
| 1135 | Gilbertines founded | |
| 1190 | Teutonic Knights founded | |

APPENDIX I

Second Turning Point: *Rise of the Mendicants*

TABLE 1.3: Age of the Mendicant Orders (1200-1500)

Dominant Image of Religious Life: The simple friar who begs for his keep and follows in the footsteps of the Lord is the idea of religious life and medieval Christendom. He prays as he goes to sleep, steeping himself in the love of Christ. Unencumbered by landed wealth, the mendicants are free to travel on foot to any place they are needed by the Church and to provide it with a credible example of the gospel injunction to give away everything to the poor. They hold themselves ready to preach, cultivate learning, serve the poor, and minister to the needs of society in the name of the Church.

Thirteenth Century

| | | |
|------|-------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1207 | Dominicans founded | Rapid expansion of mendicant orders. Friaries and Priors spring up in medieval towns across Europe. Mendicants teach, especially in the new universities, and preach, especially against heresy. Monastic orders imitate some activities of the mendicants. |
| 1209 | Carmelites founded | |
| 1211 | Franciscans founded | |
| 1216 | Beguines begin | |
| 1221 | 5,000 Franciscans attend chapter of Mats | |
| 1243 | Augustinians founded | |
| 1256 | 13,000 Dominicans in the world | |
| 1298 | Boniface VIII imposes cloister on all women religious | |

Fourteenth Century

| | | |
|------|--------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|
| 1312 | Templars suppressed by Rome | Stabilization and slow decline of mendicant orders. Flagrant abuses and laxity are prevalent in religious life during the last half of the century. |
| 1325 | 75,000 men in mendicant orders | |
| 1344 | Brigitines founded | |
| 1349 | Black Death | |
| 1365 | Alexian Brothers founded | |
| 1400 | 47,000 men in mendicant orders | |

Fifteenth Century

| | | |
|------|--------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1415 | Hus burned at the stake | Various reforms restore the mendicant ideal and produce a gradual increase in membership. First stirrings of the Renaissance introduce an uneasiness into the Church and religious life. |
| 1435 | Minims founded | |
| 1450 | Gutenberg | |
| 1492 | Columbus | |
| 1500 | 90,000 men in mendicant orders | |

Third Turning Point: *The Counter-Reformation*

APPENDIX I

TABLE 1.4: Age of the Apostolic Orders (1500-1800)

Dominant Image of Religious Life: Men and women religious are to form an elite corps of devoted servants ready to aid the Church in its new apostolic needs, especially the formidable renewal tasks of the Counter-Reformation. A high level of personal holiness enables these religious to face the risks of these new undertakings without the protection of all the monastic observances.

Sixteenth Century

| | | |
|------|------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1517 | Luther sparks the Reformation | Religious life virtually wiped out in Protestant Europe. Founding and spread of a new style of religious life in the format of orders dedicated to the active apostolate, with no enclosure in the case of women. These groups work at providing services of charity and instruction, shoring up the Church's political power in Catholic Europe, and spreading the gospel in the foreign missions. |
| 1535 | Ursulines founded | |
| 1539 | Gilbertines suppressed by Henry VIII | |
| 1540 | Jesuits founded | |
| 1541 | Francis Xavier sets sail for the Far East | |
| 1545 | Trent starts | |
| 1561 | Teutonic Knights disbanded | |
| 1562 | Discalced Carmelite reform | |
| 1563 | Trent imposes cloister on all nuns under pain of excommunication | |

Seventeenth Century

| | | |
|------|---------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1610 | Visitation Nuns founded | Flowering of Baroque spirituality, especially in French School. Adaptation for the sake of the apostolate spawns new variations: societies of priests and clerical congregations for men; more or less successful attempts to evade cloister for women. Bulk of men religious still belong to mendicant orders. |
| 1625 | Vincentians founded | |
| 1633 | Daughters of Charity founded | |
| 1650 | St. Joseph Sisters founded | |
| 1662 | Rancé launches Trappist reform | |
| 1663 | Paris Foreign Mission Society founded | |
| 1681 | Christian Brothers founded | |
| 1700 | 213,000 men in mendicant orders | |

Eighteenth Century

| | | |
|------|--------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1720 | Passionists founded | A few congregations are founded but religious life as a whole seems to be in slow decline due to mentality of the Enlightenment, inroads of Jansenism, enervation of comfort and wealth. Weakened religious life is delivered the <i>coup de grâce</i> by the French Revolution, which sets off a wave of political suppression and defection in France and across the rest of Catholic Europe. |
| 1735 | Redemptorists founded | |
| 1770 | 300,000 men in religious life in the world | |
| 1773 | Jesuits suppressed by Rome | |
| 1789 | French Revolution starts | |

Fourth Turning Point: *French Revolution*

APPENDIX I

TABLE 1.5: Age of the Teaching Congregations (1800-Present)

Dominant Image of Religious Life: Religious dedicate their lives to the salvation of their own souls and the salvation of others. The style of life of religious men and women blends an intense pursuit of personal holiness with a highly active apostolic service. Identity with the person of Christ unites this twofold objective into a single purpose.

Nineteenth Century

| | | |
|------|------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1814 | French Restoration; Jesuits restored by Rome | Revival of religious life after widespread state suppressions. Numerous foundations of congregations dedicated to a return to authentic religious life blended with service, principally in schools. Old orders, such as Jesuits and Dominicans, rejuvenated in the format of the teaching congregations. Church gradually centralizes around the papacy and isolates itself from secular trends of the modern world. |
| 1825 | Fewer than 70,000 men in religious life in the world | |
| 1831 | Mercy Sisters founded | |
| 1850 | 83,000 men in religious in the world | |
| 1859 | Salesians founded | |
| 1870 | Papal infallibility declared | |

Twentieth Century

| | | |
|------|--------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1901 | <i>Normae</i> recognized noncloistered women as true religious | Expansion and solidification. In the sixties, crises set in from within religious life due to loss of identity and inroads of secularizing process. Numerous defections and decreasing numbers of new members |
| 1962 | Vatican II: 173,351 women and 33,309 men in religious life in U.S. | |
| 1966 | 181,411 women and 35,029 men in religious life in U.S. | |
| 1977 | 130,804 women and 30,960 men in religious life in U.S. | |

Fifth Turning Point (?)

The formula presented below of the five simple vows pronounced by those who make profession of four vows is the formula promulgated by both the New York Province and the Upper Canada Province of the Society of Jesus.

FORMULA OF THE SIMPLE VOWS OF THE SOLEMNLY PROFESSED

I, N.N., Professed of the Society of Jesus, promise to Almighty God, before the most holy Virgin Mary and the entire heavenly court, and to you Reverend Father N.N., General, (or: to you, N.N. in place of the General,) that I will never undertake for any reason whatsoever or consent to change those things which concern poverty in the Society, unless it be to make this poverty more strict for a justifiable reason.

Moreover, I promise that I will never undertake or seem to undertake, not even indirectly, any action by which I might be elected or promoted to some dignity or position of honor in the Society.

I further promise that I will never seek or seem to seek any dignity or position of prominence outside the Society; nor will I consent, inasmuch as I possibly can, to my election to such a position, unless I am compelled out of obedience to the one who can command me under pain of sin.

Also, if I know of anyone who is seeking or appearing to seek the two above mentioned honors, I promise that I will manifest him and the entire matter to the Society or to the General.

Besides I promise, if it should happen that I am promoted to be Head of some Church, in keeping with the concern which I ought to have for my own soul and for the proper administration of the task imposed on me, that I will hold the General of the Society in proper esteem and honor, so that I will never refuse to listen to the advise which he personally, or anyone else in the Society that he might designate for this purpose, would deign to give me. I promise that I am always ready to follow advise of this nature, if I judge that it is better than my own opinion.

All these things I understand according to the Constitutions and Declarations of the Society of Jesus.

Place _____ (v.g., Rome, in the sacristy of St. Ignatius Chapel, Regis High School),

Date _____.

(signature)
in my own hand

The formula of the four solemn vows of the professed given below is the formula promulgated by the New York Province of the Society of Jesus and the Upper Canada Province (i.e., the English Canadian Jesuits).

I, N.N., publically declare, and I promise to Almighty God, before the most holy Virgin Mary and the entire heavenly court and all here present, and to you, Reverend Father N.N., General of the Society of Jesus, God's representative, and your successors (or: to you, Reverend Father N.N., Provincial, Rector, Superior, etc., *who stand here as God's representative and in place of the General of the Society of Jesus and his successors*), perpetual poverty, chastity, and obedience; and, in accordance with this, *I Promise* special concern for the education of youth, according to the manner of living contained in the Apostolic Letters of the Society of Jesus and its Constitutions.

Moreover, I promise special obedience to the Supreme Pontiff with regard to *any apostolic assignment, in accordance with* the same Apostolic Letters and Constitutions.

Place _____ (v.g., Rome, at the altar of St. Ignatius, St. Stanislaus Chapel,

Regis High School), Date _____.

signature
in my own hand

N.B.: The formula of the final vows of the professed of three solemn vows is the same as the above, except that it omits the paragraph about the *special obedience to the Supreme Pontiff with regard to any apostolic assignments*.

LETTER FROM IGNATIUS
TO ARCHBISHOP
GIAN PIETRO CARAFA (1536)²

The life and everlasting happiness which we all desire so much is founded in an interior and genuine love of God our Creator and Lord. And this life that we desire binds us together in a firm bond of sincere, true, and unfeigned affection in the same Lord, who desires to save us if it were not for our weakness, our faults, and our accumulated misery. These reflections led me to make up my mind to write this letter. One will not find in it the bombastic style affected by so many, and which I do not condemn if it is well ordered in our Lord. I realize that, when one has left the world and cast aside its dignities and fleeting honors, we can easily believe that he has no longer any relish for the empty honor and esteem of mere words. For he will understand that he who makes himself less in this world will be greater in the next. Every consideration, therefore, being set aside which might incite to disturb or undo true interior and enduring peace, I ask, by the love and reverence of Christ our Creator, Redeemer, and Lord, that this letter be read in the same spirit of affection in which it is written. So true is this affection that I beg and beseech His infinite goodness with all the strength that He has so graciously given me to bestow on you in this life and in the next as many blessings both for body and soul as He will bestow on me in the most holy service which we are bound to render Him.

With a purpose, therefore, that is prompt and ready to be of service to all those whom I know to be servants of my Lord, I will touch upon three points, and I will be as simple and sincere as perfect candor and frankness require. Not that I wish to lay down an opinion or offer advice, but it is my purpose to persuade and urge that we take care always to lay our petitions before our Lord, from whom comes all enlightened opinion and sound counsel.

In the first place I think I have sufficient reason, founded on arguments that are sound and conjectures that are sufficiently probable, to be afraid of even entertaining the thought of loosening in any way the bonds of the community which God has given you. In speaking thus I am moved by a feeling of true peace, love and charity. I think it would be for the greater praise and service of God our Lord for it to remain even more firmly compact. Indeed, I do not give full expression to my thought on this point. I wondered what might be the source of this feeling of assurance; and after commending the matter earnestly and often to God our Lord, I thought I would write as lesser people do with those in higher station if they can be of service in giving good advice in something which concerns the service of God our Lord. The chances are that they will not make use of any direct or indirect occasion of doing so.

Secondly, I am not scandalized or disedified when a person in such a position as yours makes his noble origin or the dignity of his station in life a reason for indulging greater elegance in dress or the furnishings of his apartment, especially if he does so with a thought of those

² Epistolae 1, 114-118 [Letter 11]; in W. J. YOUNG, *Letters of St. Ignatius of Loyola*, Chicago, Loyola Univ. Press, 1959, pp. 28-31.

externs who may come to deal with him. For even this can be done with a view to one's needs or the circumstances of time and place. And yet we should keep before our mind only that which is perfect. And for this reason I think it would be the part of wisdom to call to mind saints like the blessed Francis and Dominic and the others of the long ago, and consider especially their manner of life in dealing with their associates and the example they gave at the time they were forming their orders. We should have recourse to the true and sovereign Wisdom to ask for greater light and to obtain that clearness of vision which will order everything to His greater service and praise. Many things are lawful which are not expedient, as St. Paul says of himself; and we must not give others the occasion of indulging a weakness but should serve as an example for their advancement, especially those of our own household, whose eyes and ears are more attentive to the words and actions of their superior.

Thirdly, I hold it as an established truth that God our Lord has created everything in this present life for the service and good of men, and this is true with all the greater reason in regard to those men who are more perfect. Now, since your pious and holy congregation is a way to perfection—in fact, is the state of perfection—I have no doubt, indeed I firmly believe, that even though they do not preach or engage in any of the corporal works of mercy, they are justified in expecting food and clothing according to the order of divine charity. They are leading a blameless life under obedience, and have, therefore, more time for occupations that are more spiritual and more important. They can thus accept this support which will help them to increase their praise and service of their true Creator and Lord. It seems, therefore, to be very good and a much safer procedure to place everything in the hands of Christ our Lord, for whose sake we do everything for the greater edification of all, and because this will be the best way of preserving and enlarging the pious and holy community which you have already begun.

But we must weigh well the reasons which others who are not so courageous or who find themselves in greater solicitude for the things of this world or the necessities of life may allege in an opposite sense, and who base their stand on apparently solid arguments. They assert that it would be very difficult for them to continue for any length of time in such an order for three reasons which stand out very clearly. First, they are without the bare necessities of life, and yet they do not beg; second, they do not preach; and third, they do not practice the corporal works of mercy, such as burying the dead, saying Mass for the dead, and so on. Even if they did not beg, as I have said, but performed some of their works in public, such as preaching and so on, they would awaken an interest in other members of the clergy, moving some to repentance and others to help them to preserve and increase their numbers. If they had neither facilities nor opportunities for such works, they should take the trouble to ask some parishes to call upon them for help in burying the dead and in praying for them and offering Masses gratis. I should think that, if they were thus to serve our Lord in pious works, the people would feel more inclined to support them with great charity. You might say that, even though they did no begging but put all their trust in the Supreme Goodness, this would be enough to guarantee their support. Men of weaker faith, or those who bear the responsibilities of authority, might object to this and say that St. Francis and others of the blessed who thought they had as much confidence and trust in God did not for this reason neglect to take proper means to see that their houses were preserved and grew in number for the greater service and praise of the Divine Majesty. To do otherwise would have seemed to them rather to tempt the Lord they aimed at serving and to act in a way that would not be in keeping with His service.

I omit other reasons of greater moment, as I do not wish to commit them to writing, since they were not conceived by me originally but were raised and suggested by others. It is enough for me to offer you these reasons which I have weighed and examined, and do this with perfect candor and frankness. Instead of harm, only profit can result from always having recourse to God our Lord, to ask that in His infinite and sovereign goodness He grant new remedies for new ills. May He be pleased in His usual kindness and sovereign grace to lay His most holy hand on all, so that all will turn out to His greater service and praise, just as I desire, and always pray and beseech Him in the interest of my own undertakings.

DELIBERATIO PRIMORUM PATRUM, 1539³

[1] Proxime elapsa quadragesima, cum instaret tempus in quo oportet nos ad inuicem diuididi ac separari, quod etiam summis desideriis expectabamus, ut citius ad prefixum et precogitatum a nobis finem vehementerque desideratum perueniremus, decreuimus per multos ante separationem dies inter nos conuenire et tractare inuicem de hac nostra uocatione ac viuendi formula. Quod cum pluries fecissemus, aliique ex nobis essent galli, alii hispani, alii sabaudi, alii cantabrii, in uarias sententias ac opiniones circa hunc nostrum statum scindebamur, eratque una omnium nostrum et communis mens et uoluntas, querere scilicet Dei beneplacitam ac perfectam uoluntatem, iuxta scopum uocationis nostrae: uerum in mediis expedientioribus et fructuosioribus, tamen nobis quam caeteris proximis nostris, erat aliqualis pluralitas sententiarum. Nec mirum cuiquam uideri debet, quod inter nos, infirmos et fragiles hec pluralitas sentiendi interuenerit, cum etiam ipsi persancte Ecclesie principes et columnae apostoli, aliique plurimi quam perfectissimi uiri quibus nos indigni sumus, ut cum illis, uel ex longinquo, conferamur, diuerso, interdum etiam aduerso modo, inter sese senserint; et sententias suas contrarias scripto tradiderunt. Cum ergo etiam nos varie quoque iudicaremus, sollicitique essemus ac uigilantes, ut aliquam uiam plene apertam inueniremus, per quam incedentes, nos ipsos omnes in holocaustum offerremus Deo nostro, in cuius laudem, honorem ac gloriam cederent omnia nostra; tandem decreuimus, et concordi sententia statuimus, orationibus et sacrificiis et meditationibus feruentius solito instare, et post adhibitam a nobis qualemcumque diligentiam, de reliquo in Dominum iactare omnes cogitatus nostros sperantes in eum, adeo bonum et liberalem, quod, sicut nulli petenti se in humilitate et simplicitate cordis denegat spiritum bonum, imo dat omnibus affluenter *[sic]*, nulli improperans, nullo modo etiam defuturum nobis, imo affuturum, que sua est benignitas, superabundantius quam petimus aut intelligimus.

[2] Coepimus igitur humanos nostros conatus impendere, et proponere inter nos aliquot dubia, diligenti ac matura consideratione et prouidentia digna, de quibus per diem cogitare et meditari, et per orationes etiam inuestigare solebamus. Et noctu quisque id, quod rectius et expedientius iudicauerat, in medium proponebat, ut sententiam magis ueram, et plurium calculis et efficacioribus rationibus examinatam ac probatam, omnes una amplecteremur.

[3] Prima nocte qua conuenimus, propositum fuit hoc dubium: an expediret magis, quod, postquam nos uitamque nostram Christo Domino nostro et eius uero ac legitimo uicario in terris obtuleramus et dedicaueramus, ut ille de nobis disponat, mittatque eo, ubi plus iudicauerit nos posse fructificare, siue sit... siue indi, siue heretici, siue alii quicumque fideles uel infideles; an, inquam, magis expediret nos ita esse inter nos deuinctos et colligatos in uno corpore, ut nulla, quantumcumque magis corporum diuisio nos separaret; an forte non ita expediret. Quod, ut exemplo fiat manifestum, ecce modo sumus pontifex mittit ex nobis duos in ciuitatem Senarum; debemusne illorum, qui illo pergunt, curam gerere, uel illi de nobis, et mutuo nos intelligere, an forte non magis illos curare, quam illos qui sunt extra Societatem? Tandem diffiniuimus partem affirmatiuam, scilicet, quod, postquam clementissimus ac pietissimus Dominus dignatus fuerat nos, ita infirmos et tam ex diuersis regionibus et moribus natos, inuicem unire et congregare; quod non deberemus Dei unionem et congregationem scindere, sed potius in dies confirmare et

³ Text in *ConsMHSJ*, 1, pp. xxxv-xl.

stabilire, reducendo nos ad vnum corpus, et alii aliorum curam habentes et intelligentiam ad maiorem fructum animarum, cum etiam virtus ipsa vnita plus roboris et fortitudinis habeat ad quecumque bona ardua persequenda, quam si esset in plures partes dispersa. In his tamen omnibus, que dicta sunt et que dicentur, ita intelligi volumus, ut nihil penitus ex proprio nostro spiritu et capite asseramus, sed solum, quicquid id sit, quod Dominus inspirauerit, et sedes apostolica confirmauerit ac probauerit.

[4] Deciso et resoluta primo hoc dubio, peruentum est ad aliud difficilius, non minori consideratione ac prouidentia dignum: an, scilicet, postquam nos omnes emiseramus votum castitatis perpetue et votum paupertatis in manibus reuerendissimi legati sue sanctitatis, cum ageremus Venetiis an, inquam, expediret emittere tertium, scilicet, obediendi alicui ex nobis, ut sincerius et maiori cum laude et merito possemus per omnia implere voluntatem Domini Dei nostri, simul etiam liberam voluntatem ac preceptum sue sanctitatis, cui nos libentissime nostra omnia, voluntatem, intellectum, potentiam etc. obtuleramus.

[5] Ad huius dubii solutionem, cum multis diebus orationi instarem ac cogitarem, nihilque occurreret quod impleret animos nostros, in Domino sperantes, coepimus inter nos agitare aliqua media ad melius soluendum dubium. Et primo: an expediret omnes nos ad heremum aliquam secedere, ibique manere per triginta vel quadraginta dies, meditationibus, ieiuniis et penitentiis vacantes, ad hoc, quod Dominus exaudiret desideria nostra, dignareturque mentibus nostris solutionem dubii infigere; an vero tres vel quatuor, omnium nomine, eo pergere deberent ad eundem effectum; an vero si nulli in heremum essent ituri, quod, intra urbem manentes, mediam diei partem huic vni nostro negotio applicarem, ut meditationi, cogitationi et orationi esset commodior et amplior locus, et reliquam diei partem solitis nostris exercitiis predicandi, confessiones audiendi impenderemus.

[6] *Tandem, his discussis et examinatis, statuimus: quod omnes maneremus intra urbem, duabus presertim de causis: prima, ne fieret rumor et scandalum in ciuitate et in populo, qui iudicaret ac putaret, que solita est hominum in iudicando temerarie pronitas, nos vel fugam cepisse vel aliquid noui moliri, vel ne interim per absentiam iactura fieret fructus, quem tunc magnum videbamus fieri in confessionibus, predicationibus et in aliis spiritualibus exercitiis; et adeo magnum quod, si fuisset in numero quadruplo plures quam eramus, non poteramus omnibus, sicut nec modo, satisfacere.* Secundum, de quo cepimus agitare ad inueniendum viam solutionis, fuit proponere omnibus et omnium cuilibet tres sequentes animi preparationes. Prima est, quod vnusquisque ita se prepararet, ita orationibus, sacrificiis et meditationibus vacaret, ut niteretur in inueniendo gaudium et pacem in Spiritu Sancto circa obedientiam, quantum ex se est laborans habere voluntatem magis affectam ad obediendum quam ad precipiendum, vbi par Dei gloria et sue maiestatis laus sequeretur. Secunda animi preparatio est, quod nullus ex sociis apud alterum socium hac de re verba faceret, vel quereret ab eo rationes, ut nulla alterius persuasionem alius traheretur, et flecteretur magis ad obediendum quam ad non obediendum, vel contra; sed quod vnusquisque id solum quereret, quod ex oratione et meditatione, tanquam expedientius, hausisset. Tertia, quod quilibet reputaret se ipsum alienum ab hac nostra congregatione, et in quam nunquam exspectaret recipi, ut ex hac consideratione nullis prorsus affectibus feratur ad magis ita opinandum et iudicandum, sed, quasi alienus, libere proferat suam sententiam in medium circa propositum obediendi vel non obediendi, et tandem eam partem suo iudicio confirmet ac probet, per quam credit maius Dei futurum seruitium, et tutiorem Societatis conseruationem permansuram.

[7] His praeiis animi dispositionibus, ordinauimus, quod die sequenti omnes preparati accederemus, dicturi quilibet ea omnia incomoda, que fieri possent contra obedientiam, omnes rationes que occurrebant, et quas quisque nostrum separatim cogitando, meditando, orando inuenerat, et quilibet ordine suo proferebat que hauserat. Exempli gratia, dicebat vnus: videtur quod hoc nomen religionis seu obedientie non ita bene audit in populo christiano, propter demerita et peccata nostra, sicut audire debuisset. Alius vero dicebat: si volumus viuere sub obedientia, cogemur forte a summo pontifice sub alia regula iam facta et constituta viuere; quo fieret, vt, cum non ita daretur opportunitas et locus operandi circa salutem animarum, cui vnicae rei, post nostri ipsorum curam, intendimus, frustarentur omnia desideria nostra, iudicio nostro Domino Deo nostro accepta. Item alius: si prestamus obedientiam alicui, non tot ingredientur in congregationem nostram ad laborandum fideliter in vinea Domini, in qua, cum tanta sit messis, pauci tamen inueniuntur veri operarii, et plures, quae hominum est infirmitas et fragilitas, magis querunt que sua sunt et propriam voluntatem, quam que Jesu Christi et plenam sui negationem. Item alius alio modo, et ita quartus et quintus etc., enarrans incommoda, que contra obedientiam occurrebant. Alia vero die proxime sequenti disputabamus in contrarium, adducentes in medium omnia commoda et fructus ipsius obedientie, quos quisque in oratione et meditatione hauserat; et quilibet suo ordine proferebat meditata, modo deducendo ad impossibile, modo simpliciter et affirmatiue agendo. Exempli gratia: aliquis ita deducebat rem ad absurdum et impossibile: si congregatio haec nostra absque suauis obedientiae jugo haberet curam rerum agibilibus; nullus haberet curam exactam, cum vnus in alterum hoc onus reliceret, ut pluries experti sumus. Item, si haec congregatio esset sine obedientia, non diu posset permanere et perseuerare, quod tamen pugnat contra primam nostram intentionem conseruandi perpetuo nostram Societatem; cum ergo nulla re magis conseruetur congregatio aliqua quam obedientia, videtur nobis necessaria, maxime nobis, qui vouimus perpetuam paupertatem, et versamur in assiduis et iugibus laboribus, tam spiritualibus quam temporalibus, in quibus minus conseruatur societas. Affirmatiue dicebat alius sic: obedientia parit actus et virtutes heroicis etiam continuas. Nam qui viuunt vere sub obedientia, est promptissimus ad exequendum quecumque sibi iniungerentur, siue illa essent difficillima, siue confusionem et risum et spectaculum mundo generantia: vt, verbi gratia, si imponeretur michi, quod ego incederem nudus, vel indutus vestibus inusitatis per vicos et plateas; quod, licet nunquam precipiatur, dum quisque tamen est paratissimus ad illa facienda, negando proprium iudicium et omnem suam voluntatem; ille esset semper in actibus heroicis et meritum augmentibus. Item nichil ita prostrat superbiam omnem et arrogantiam, quam obedientia. Nam superbia magni facit, vt sequatur proprium iudicium et propriam voluntatem, nulli cedens; ambulans in magnis et in mirabilibus super se; contra vero per diametrum pugnat obedientia; semper enim sequitur iudicium alienum et voluntatem alterius, omnibus cedit, et humilitati, quae inimica est superbiae, quam maxime sociatur. Et quamquam nos sumo pontifici ac pastori donauerimus omnem obedientiam, tam vniuersalem quam particularem, tamen circa particularia nostra et contingentia, que sunt innumera, non poterit, nec, si posset, deceret, illum vacare.

[8] Postquam ergo multis diebus plurima hinc et inde agitauimus circa solutionem dubii pensando et examinando rationes grauioris momenti et efficaciores, vacando exercitiis solitis orationis, meditationis, cogitationis; tandem, Domino prestante auxilium, non per plurium vocum sententias, sed nullo prorsus dissidente, conclusimus: nobis expeditius esse et magis necessarium, prestare obedientiam alicui ex nostris, ut melius et exactius prima nostra desideria, implendi per omnia diuinam voluntatem, exequi possimus, et ut tutius conseruetur Societas, et tandem, ut negotiis occurrentibus particularibus, tam spiritalibus quam temporalibus, decenter prouideri possit.

[9] Seruato similiter eodem ordine discutiendi et procedendi in reliquis omnibus, semper in utranque partem agendo, inmorati sumus in his et aliis per tres fere menses, a medio quadragesime usque ad festum Joannis Baptiste inclusiue. Quo die omnia suauiter et concordii animorum consensu terminata ac finita sunt, non sine magnis vigiliis, orationibus et laboribus mentis et corporis premissis, antequam hec definiremus et deliberaremus.

THE DELIBERATIONS OF THE FIRST FATHERS, 1539⁴

[1]. Near the end of Lent the time was drawing near when we would have to be dispersed and separated from one another. We were very eager for this, recognizing it as necessary in order to reach the goal we had already fixed upon and thought about with intense desire.

We decided to discuss with one another our vocation and manner of life. After doing this for several days, we were divided by different ideas and opinions concerning our state of life, some of us being French, others Spanish, others Savoyards or Portuguese. There was unity of mind and purpose: to seek the gracious and perfect will of God according to the scope of our vocation; but there were various opinions concerning the more effective and more successful means both for ourselves and for our fellowmen.

It should surprise no one that this difference of opinion occurred among us weak and frail men, since even the Apostles, princes and pillars of the most holy Church, as well as many most perfect men with whom we are unworthy to be even remotely compared, had points of view which were different and at times in direct contradiction, and they have left these contrary opinions in writing. Since we judged matters differently, we therefore were anxious to seek and find some truly open way that we could follow in offering ourselves as a holocaust to our God, to whose praise and honor our all might be surrendered.

Finally, we decided and determined unanimously to give ourselves to prayers and sacrifices and meditations with greater than usual fervor and, after using all our own resources, to cast all our concerns upon the Lord, hoping in Him who is so good and generous that He denies His good spirit to no one who asks with a humble and single heart. Indeed, He gives with largesse to all men disappointing no one. Certainly, He would not fail us; but so great is His goodness, He would help us beyond our desires and understanding.

[2]. We began, therefore, to use all our human efforts and to bring forward our common problems deserving of careful and mature consideration and planning. Our custom was to reflect and meditate and pray over the questions throughout the day. In the evening each man proposed to the rest what he judged to be more correct and more expedient, in order that all might unanimously embrace the opinion that was truer and that had been examined and proved by stronger reasons and by votes of the majority.

[3]. The first evening we came together, this question was proposed: after we had offered and dedicated ourselves and our lives to Christ our Lord and to His true and legitimate vicar on earth, so that he might dispose of us and send us wherever he might judge we could be most effective—whether to the Indies, the heretics, or among any of the faithful or among non-Christians—would it be better for us to be so joined and bound together in one body that no physical dispersal, however great, could separate us? Or perhaps would this be inexpedient?

⁴ Translation from J. FUTRELL, *Making An Apostolic Community of Love*, St. Louis, IJS, 1970, pp. 188-194.

A clear example of the problem was the Pope's sending two of us to Siena. Should we have concern and mutual comprehension for those going there, and they for us? Or should we perhaps have no greater concern for them than for persons outside our Company. Finally, we decided affirmatively, namely, that since the most kind and loving Lord had deigned to unite us to one another and to bring us together—weak men and from such different places and cultures—we should not sever God's union and bringing together, but rather everyday we should strengthen and more solidly ground it, forming ourselves into one body. Everyone should have concern for and comprehension of the others for greater apostolic efficacy, since united strength would have more power and courage in confronting whatever challenging goals were to be sought than if this strength were divided into many parts.

Now, in all that has been recounted and yet will be, we wish it to be understood that we adopted nothing at all from our own "spirit" and subjective notions, but only (whatever it might be) what the Lord inspired and the Apostolic See confirmed and approved.

[4]. Having decided and solved the first problem, we faced another more difficult one worthy of no less reflection and foresight. Having already pronounced perpetual vows of chastity and poverty before the most reverend legate of His Holiness when we were working in Venice, we now asked whether we should pronounce a third vow, namely to obey one of us in order that we might carry out the will of our Lord God more sincerely and with greater praise and merit and, at the same time, carry out the will and command of His Holiness to whom we had most willingly offered our all: will, understanding, strength, and the rest.

[5]. After many days of reflection and prayer, nothing had transpired to fill our souls with peace in solving this problem. Hoping in the Lord, we began to discuss mutually some means to solve the problem. First of all, we asked whether it might be good for all of us to withdraw to some hermitage and to remain there for thirty or forty days, spending all our time in meditations, fasting, and penances to the end that God might respond to our desires and deign to impress upon our minds the solution of the problem. Then, we asked whether three or four in the name of all should retire in this way for the same purpose. Or whether—although no one would go to a hermitage, all remaining in the city—we should devote ourselves to this one affair, so that we might give a larger and more ample place to meditation, reflection, and prayer, spending the rest of the day in our usual works of preaching and hearing confessions.

[6]. Finally, after discussing and examining these proposals, we decided that all would remain in Rome for two reasons especially: first, so as not to cause rumors and scandals in the city and among the people who, since men are so inclined to rash judgement, might conclude and suppose that we had taken flight or begun work at something new or had little stability and perseverance in carrying out what we had begun; secondly, so that through being absent we would not in the meantime lose the great results we were seeing in hearing confessions, preaching, and other spiritual exercises, the demands for which were so great that if we were four times our number we could not satisfy all, as we cannot do at present.

Concerning the problem we have been discussing, in order to find the way to solve it the three following preparations of soul were proposed to one and all. The first was that each one should so prepare himself, should so devote himself to prayers, sacrifices and meditations, that he make every effort to find joy and peace in the Holy Spirit concerning obedience, working with

all his powers to have a will more disposed to obeying than to commanding when the effect would be the equal glory of God and praise of His Majesty.

The second preparation of soul was that none of the companions should talk to another companion about this matter or should inquire about his arguments, so that no one would persuade another or incline him more in favor of obeying or of not obeying or the contrary, but that each one would desire as more expedient only that which he derived from prayer and meditation.

The third: that each man should think of himself as not being one of our Company, into which he never expected to be received, so that from this consideration he would not be pushed toward his opinion and judgement by any emotions, but as an outsider he might freely propose his idea to us concerning the resolution of obeying or not obeying, and finally he would confirm and approve by his judgement that alternative which he believes to be for the greater future service of God and the more secure permanent preservation of the Company.

[7]. With these antecedent spiritual dispositions, we ordained that the following day all would come together prepared. Each one would state all the possible disadvantages of obedience, all the arguments which arose and which each one of us had thought of individually in reflecting, praying, and meditating; and he should propose in his turn what he had drawn from this.

For example, one said: "It seems that this name of a religious institute or obedience does not have the good reputation it should among Christian people, on account of our failings and sins,"

Another said: "If we wish to live under obedience, perhaps we will be obliged by the supreme pontiff to live under some already established and constituted rule. If this happens, since it might not give us the opportunity and scope to work for the salvation of souls, which is our unique purpose after concern for our own souls, all of our desires, which in our judgement we have received from the Lord our God, would be frustrated."

Still another said, "If we vow obedience to someone, not so many men will enter our company to work loyally in the vineyard of the Lord where the harvest is so great but so few true laborers are found. The weakness and inconstancy of men is such that many seek selfish ends and their own will, rather than the desires of Jesus Christ and their own total self-abnegation."

In the same way another man gave other reasons and thus a fourth man and a fifth, and so on, stating the apparent arguments against obedience.

The following day we discussed the opposite, bringing before the group all the advantages and benefits of this obedience which each one had drawn from his prayer and meditation. Each one in turn proposed the results of his prayerful reflection, sometimes by deducing impossible conclusions, sometimes simply by direct affirmation.

For example, one reduced the case to the absurd and impossible: "If our Company attempted to take care of practical matters without the sweet yoke of obedience, no one would

have a specific responsibility, since one would leave the burden of such responsibilities to another, as we have often experienced.”

Similarly: “If this Company exists without obedience, it cannot long remain in being and continue. Yet, this is in conflict with our primary intention of perpetually preserving our Company in being. Consequently, since nothing preserves a company more than obedience, it seems necessary—especially for us who have vowed perpetual poverty and who live our lives in arduous and continual labors both spiritual and temporal, in which a company is less likely to continue in being.”

Another spoke affirmatively thus: “Obedience brings about constant actions of heroic virtue. For a man who lives under obedience is most prompt to carry out whatever is demanded of him, even if this be extremely hard or even if it leads to his being embarrassed and laughed at and to being a spectacle to the world—for example, if it were commanded me that I should go through the public streets naked or dressed in eccentric clothes (granted that this might never be commanded). When a man is perfectly ready to do this, denying his own will and judgement, he is constantly practising heroic virtue and increasing his merit.”

Similarly: “Nothing so lays low all pride and arrogance as does obedience. For pride puffs up and follows one’s own judgement and will, giving way to no one, striving for grandiose and spectacular projects beyond one’s power. Now, obedience directly counters this, for it always follows the judgement and will of another, gives way to everyone, and is identified as much as possible with humility, which is the enemy of pride.”

And: “Although we have given ourselves over to all obedience both universal and particular to the supreme pontiff and pastor, nevertheless, he would not be able to take care of our particular needs, which are innumerable—nor would it be fitting for him to do so if he could.”

[8.]. And so after many days of thinking through the many pros and cons of our problem and examining the more serious and weighty arguments, while carrying out our usual exercises of prayer, meditation, and reflection, at last, with the help of the Lord, we arrived at our conclusion, not just by a majority but without even one dissenting: that it would be more expedient and even necessary to vow obedience to one of our companions in order that we might better and more exactly fulfil our principle desires of accomplishing the divine will in all things, and in order that the Company might be more surely preserved in being, and finally, that all individual matters that might occur, both spiritual and temporal, might be provided for properly.

[9]. retaining the same method of discussion and procedure in all remaining questions, always proposing both sides, we continued in these and other deliberations for nearly three months, from the middle of Lent through the feast of John the Baptist. On this day everything was terminated and concluded joyfully and in complete concord of spirit—not without having previously engaged in many vigils and prayers and labors of mind and body before we had deliberated and made our decisions.

APPENDIX VI

I.H.S.

DE LEGIBUS PARTICULARIBUS IURIS PONTIFICII
SOCIETATIS IESU

Romae, Novembri 1993

I. PRAENOTANDA

1. De iure pontificio Societatis Iesu eiusque partibus

1.1 Nomine “Institutum Societatis Iesu” significatur cum eius vivendi atque operandi ratio tum documenta scripta quibus haec ratio authentice et legitime proponitur. Horum documentorum alia sunt vere leges, alia autem sanas Societatis traditiones ostendunt.

1.2 Primum dignitatis auctoritatisque gradum in Instituto Societatis Iesu obtinet ius pontificium Societatis proprium, quale colligitur ex Litteris Apostolicis, Rescriptis, Indultis a Sancta Sede pro ea datis.

1.3 In ius pontificium transiit praesertim “Formula” Instituti seu “Regula” fundamentalis Societatis, primum a Paulo III (“Regimini militantis”, 27 sept. 1540), deinde exactius et distinctius expressa a Iulio III (“Exposcit debitum”, 21 iul. 1550), atque a compluribus successoribus in forma specifica approbata.

1.4 Sunt etiam aliae Instituti leges quae in ius pontificium transierunt, quatenus etiam illae a Sancta Sede in forma specifica, seu “motu proprio et ex certa scientia”, approbatae sunt.

1.5 Tum Formulam Instituti tum illas alias leges Societatis quae in ius pontificium transierunt hic sub denominatione communi “leges particulares Societatis Iesu iuris pontificii” comprehendimus.

1.6 Praeterea, inde ab initio eius existentiae, Societati a Sancta Sede per Litteras Apostolicas, Rescripta et Indulta complura privilegia, immunitates, exemptiones et indulta concessa sunt, quorum non pauca etiam nunc in usu sunt nec revocata. Haec etiam ad ius pontificium Societatis pertinent.

(De iis tamen hic nunc non agemus, unice ad supra dictas leges particulares Societatis Iesu iuris pontificii attendentes).

2. Documenta in quibus leges particulares Societatis Iesu iuris pontificii continentur

Talia documenta sunt diversae Litterae Apostolicae, sive sub plumbo (Bullae) sive in forma brevis datae, quae sequuntur:

Pauli III

1. Regimini militantis, 27 sept. 1550. Prima Instituti Societatis Iesu approbatio, cum restrictione numeri ad sexaginta dumtaxat.

2. **Iniunctum Nobis**, 14 mart. 1544. Facultas quosvis idoneos, sine restrictione numeri, ad Societatem admittendi et constitutiones condendi.

3. **Exponi Nobis**, 5 iun. 1546. Facultas admittendi Coadiutores, tam spirituales, qui possint ad sacros ordines promoveri, quam laicos. Indoles eorum votorum.

IULII III

4. **Exposcit debitum**, 21 iul. 1550. Confirmatio alia Instituti.

Pii V

5. **Cum indefessae**, 7 iul. 1571. Declaratur Societas ex Instituti ratione mendicans, aliisque mendicantium Ordinibus connumeratur et privilegiis aequatur.

GREGORII XIII

6. **Ex Sedis apostolicae**, 28 febr. 1573. Approbatio et nova concessio facultatum horas canonicas extra chorum recitandi et sacros ordines post emissa vota etiam ante professionem suscipiendi.

7. **Quanto fructuosius**, 1 febr. 1583. Societatis Iesu Institutum, privilegia et Constitutiones confirmantur, et eos qui, peracto novitiatu, tria vota emiserint, tametsi simplicia, vere et proprie Religiosos esse declaratur.

8. **Ascendente Domino**, 25 maii 1584. Nova confirmatio Instituti Societatis Iesu.

GREGORII XIV

9. **Ecclesiae catholicae**, 28 iun. 1591. Societatis Iesu Institutum et ratio gubernandi confirmatur.

PAULI V

10. **Quantum religio**, 4 sept. 1606. Confirmatio Instituti et privilegiorum, et approbatio Constitutionum Gergorii XIII et XIV, novaque concessio.

11. **Ex incumbenti**, 31 ian. 1618. Dispensatio in duobus votis simplicibus, quae Professi Societatis Iesu emittunt, reservatur Papae.

URBANI VIII

12. **Vota, quae Deo**, 25 ian. 1632. Ampliatio Constitutionis Pauli V, reservantis duo vota simplicia Professorum Summo Pontifici.

13. **Honorum dignitatumque**, 26 febr. 1643. Votum non ambiendi obligat dimissos et translatos ad alis Religiones, et solus Pontifex potest praecipere ut dignitates acceptentur.

BENEDICTI XIV

14. **Devotam maiori**, 17 dec. 1746. Abrogatio Constitutionis Innocentii X, de Congregatione Generali novennali.

15. **Laudabile Romanorum Pontificum**, 15 febr. 1758. Quaestio de dominio Congregationum B. Mariae V. in aedes, vasa etc. dirimitur.

CLEMENTIS XIII

16. **Apostolicum pascendi**, 7 ian. 1765. Constitutio, qua Institutum Societatis Iesu denuo approbatur.

PII VII

17. **Sollicitudo omnium ecclesiarum**, 7 Aug. 1814. Societatis Iesu in universo orbe restitutio.

LEONIS XIII

18. **Dolemus inter alia**, 13 iul. 1886. Nova Instituti et privilegiorum Societatis Iesu confirmatio.

PIE XI

19. **Paterna caritas**, 12 mart. 1933. Privilegiorum et iuris peculiaris Societatis Iesu confirmatio, etiam post novum Codicem Iuris Canonici (1917).

II. ELENCHUS LEGUM PARTICULARIUM SOCIETATIS IESU IURIS PONTIFICII

1. *Societas*

1. Iesu nomine insignitur

“... quam [Societatem] Iesu insigniri cupimus”: Formula n. 1; Iulius III, “Exposcit debitum”, 1550. (Institutum Societatis Iesu, volumen I, Florentiae 1892 [deinceps: Inst. I], pag. 23b).

“... statuimus nomen Societatis Iesu, quo laudabilis hic Ordo nascens a Sede Apostolica nominatus est, et hactenus insignitus, perpetuis futuris temporibus in ea retinendum esse”: Gregorius XIV, “Ecclesiae catholicae”, 1591; (Inst. I, pag. 120a).

2. Fines Societatis

“... Societatis, ad hoc potissimum institutae
- ut ad fidei defensionem et propagationem et profectum animarum in vita et doctrina christiana ... intendat;
- et nihilominus ad dissidentium reconciliationem et eorum qui in carceribus vel in hospitalibus inveniuntur, piam subventionem et ministerium, ac reliqua caritatis opera, prout ad Dei gloriam et commune bonum expedire visum erit, exsequenda”: Formula n.1; Iulius III, “Exposcit debitum”, 1550; (Inst. I, 23b).

3. Media praecipua ad hos fines obtinendos

“per publicas praedicationes, lectiones et aliud quodcumque verbi Dei ministerium ac Spiritualia Exercitia, puerorum ac rudium in christianismo institutionem, Christi fidelium in Confessionibus audiendis ac ceteris Sacramentis administrandis, spiritualem consolationem praecipue intendat”: Formula n. 1; Iulius III, “Exposcit debitum”, 1550, (Inst. I, 23b).

2. *Membra Societatis*

4. 1. Facultas quosvis idoneos, sine restrictione numeri, admittendi

“... quoslibet fideles, ..., quotquot fuerint, ad Societatem huiusmodi libere admittere, et eorum Societati huiusmodi, sub votis per Socios eiusdem Societatis emitti solitis, aggregare possint, ..., concedimus”: Paulus III, “Iniunctum Nobis”, 1544, (Inst. I, 9a).

5 2. **Diversitas membrorum**

a) quoad Coadiutores tam spirituales quam temporales

“... vobis, quod de caetero Sacerdotibus qui vos in spiritualibus, et personis saecularibus quae vos in temporalibus et officiis vestris domesticis coadiuvent, uti possitis; ... plenam et liberam, ..., concedimus licentiam et facultatem”: Paulus III, “Exponi Nobis”, 1546, (Inst. I, 12a-13a).

b) quoad Professos quattuor votorum, Professos trium votorum (tantum aliquos), Coadiutores spirituales et temporales, et Scholares (quibus aequiparantur Coadiutores temporales non-formati): cfr. Formula n. 9, “Exposcit debitum”, 1550, (Inst. I, 26ab); Gregorius XIII, “Ascendente Domino” 1584, (Inst. I, 92b).

2.1. *Professi quattuor votorum*

6 1. **Presbyteri esse debent**

“Socii autem omnes, cum Presbyteri esse debeant”: Formula n. 3; Iulius III, “Exposcit debitum”, 1550, (Inst. I, 26a); cfr. Gregorius XIII, “Ex Sedis apostolicae”, 1573, (Inst. I, 54b).

7 2. **Tria vota sollemnia paupertatis, castitatis et oboedientiae emittunt**

“Quicumque in Societate nostra, ..., vult ..., servire, post sollemne perpetuae castitatis, paupertatis et oboedientiae votum, proponat sibi in animo se partem esse Societatis”: Formula n. 1; Iulius III, “Exposcit debitum”, 1550, (Inst. I, 23b).

8 3. **Quantum votum specialis oboedientiae Summo Pontifici circa missiones emittunt**

“... singulos nos, et quicumque eandem in posterum professionem emiserint, ultra illud commune trium votorum vinculum, speciali ad hoc voto adstringi, ut quidquid modernus et alii Romani Pontifices, pro tempore exsistentes, iusserint ad profectum animarum et fidei propagationem pertinens, et ad quascumque provincias nos mittere voluerint; ... exequi teneamur”: Formula n. 3; Iulius III, “Exposcit debitum”, 1550, (Inst. I, 24a); cfr. Gregorius XIII, “Ascendente Domino”, 1584, (Inst. I, 93a).

9 4. **Alia vota simplicia emittunt**

“Post emissam vero Professionem, sive quattuor sive trium votorum, ... nonnulla alia simplicia vota emittunt” (quorum quattuor priora tantum indicantur): Gregorius XIII, “Ascendente domino”, 1584, (Inst. I, 93a).

10 5. Dispensatio votorum de non relaxanda Societatis paupertate et de non ambienda dignitate extra Societatem Romano Pontifici reservatur

“... quod de caetero perpetuis futuris temporibus, cum Clericis eiusdem Societatis super votis praedictis, nisi per Nos aut Romanum Pontificem pro tempore existente dispensari nullatenus possit, apostolica auctoritate, tenore praesentium decernimus et ordinamus; ac facultatem super votis praedictis dispensandi Nobis et Romano Pontifici pro tempore existenti reservamus; ...”; Paulus V, “Ex incumbenti”, 1618, (Inst. I, 139a).

... “Insuper ...; tenore praesentium, nedum praelationes seu dignitates ecclesiasticas extra ipsam Societatem existentes, sed multo magis saeculares quascumque, ac quaecumque officia, quorum Officiales iurisdictionem ecclesiasticam vel laicalem, de iure, usu vel consuetudine habent, seu quomodolibet extra Societatem ipsam exercent, sub praedicto voto et prohibitione huiusmodi (Pauli V, “Ex incumbenti”) comprehensa fuisse et esse, ac comprehendi debere similiter declaramus et decernimus”: Urbanus VIII, “Vota quae Deo”, 1631; (Inst. I, 171ab).

(de voto non procurandi et acceptandi dignitates ecclesiasticas extra Societatem): “... declaramus, ..., tantummodo Nos et Romanum Pontificem pro tempore existentem posse dispensare, taleque votum relaxare, ..., ac alias quomodolibet voventes praedictos a praedicto voto liberare”: Urbanus VIII, “Honorum dignitatumque”, 1643, (Inst. I, 175b-176a).

11 6. Professorum qualitates

“... revera hoc Institutum omnino humiles et prudentes in Christo, et in christianae vitae puritate ac litteris conspicuos exigit”: Formula n. 9; Iulius III, “Exposcit debitum”, 1550, (Inst. I, 26b); cfr. Gregorius XIII, “Ascendente Domino,” 1584, (Inst. I, 92b).

12 7. Promotionis conditiones

“... opportunum iudicavimus etiam statuere ne quis ad professionem in hac Societate emittendam nisi diuturnis et diligentissimis probationibus (prout in Constitutionibus declarabitur) eius vita et doctrina explorata fuerit, recipiatur”: Formula n. 9; Iulius III, “Exposcit debitum”, 1550, (Inst. I, 26b).

2.2 Coadiutores

13 1. Facultas eos admittendi eorumque duplex genus:

“... vobis, quod de caetero Sacerdotibus qui vos in spiritualibus, et personis saecularibus, quae vos in temporalibus et officiis vestris domesticis

coadiuvent, uti possitis, ..., concedimus licentiam et facultatem”: Paulus III, “Exponi Nobis”, 1546, (Inst. I, pag. 12a).

14 2. Emittunt vota simplicia et perpetua sed conditionata

“... ii qui in Coadiutores, tam in spiritualibus quam in temporalibus, ... admittentur, ..., post sufficientes probationes et tempus in Constitutionibus expressum, vota sua ad devotionem et meritum maius, non quidem sollemnia, ... sed quibus teneantur quamdiu Praepositus Generalis in Societate eos retinendos esse consuerit, emittere debeant (prout in Constitutionibus laius explicabitur), ...”: Formula n. 9; Iulius III, “Exposcit debitum”, 1550, (Inst. I, 26b).

“... ipsique Coadiutores, tam Sacerdotes quam personae saeculares, peractis experienciis et probationibus per Constitutiones vestras requisitis, ad maiorem eorum devotionem et amplius meritum, vota paupertatis et castitatis ac etiam oboedientiae (ita ut ad illa servanda, pro eo tempore, quo tu, fili Praeposite, et qui pro tempore fuerint eiusdem Societatis Praepositi, eis in ministerio spiritualii vel temporali utendum iudicaveritis et non ultra, adstringantur, nec propterea ad aliquam sollemnem professionem emittendam teneantur, neque ad eam aliter admittantur) emittere”: Paulus III, “Exponi Nobis”, 1546, (Inst. I, pag. 12ab).

“... reliqui etiam Sacerdotes, quorum vita et doctrina in Societate diu probata esset atque Praeposito Generali perspecta, et de ipsius licentia, in Coadiutorum spiritualium formatorum gradum per tria illa vota similiter publica, sed simplicia, in Superioris manibus emissa, admitterentur”: Gregorius XIII, “Ascendente Domino”, 1584, (Inst. I, pag. 92b).

“Coadiutores temporales non formati, ..., post aliquot annos, ... per tria item paupertatis, castitatis et oboedientiae vota, quae licet publica et in manibus Superioris emissa, non tamen sollemnia, sed tum ex Constitutionum praescripto, tum ex voventis et admittentis intentione, simplicia existunt, in Coadiutorum temporalium formatorum gradum admittuntur.”: Gregorius XIII, “Ascendente Domino”, 1584, (Inst. I, 92a).

15 3. Professi trium votorum

“... praeter aliquos [coadiutores (et scholares?)], qui de licentia Praepositi Generalis, propter ipsorum devotionem et personarum qualitatem, tria vota eiusmodi sollemnia facere poterunt”: Formula n. 9; Iulius III, “Exposcit debitum”, 1550, (Inst. I, 26b).

“... et nonnullos, quos interdum ad Professionem trium [votorum] admittere potest [Generalis],”: Gregorius XIII, “Ascendente Domino”, 1584, (Inst. I, pag. 92b).

2.3 *Scholastici (et coadiutores non-formati)*

16 1. Eorum admissio

“... Studentes, ... post cognitum in spiritu et litteris eorum profectum, et post sufficientem probationem, in Societatem nostram admitti possint”: Formula n. 9; Iulius III, “Exposcit debitum”, 1551; (Inst. I, 26a).

17 2. Eorum novitiatus per biennium durat

“... statutum est, ut et novitii in Societate ... per biennii spatium probentur”: Gregorius XIII, “Quanto fructuosius”, 1583, (Inst. I, 88a); Id., “Ascendente Domino”, 1584; (Inst. I, pag. 91b).

18 3. Post novitiatum vota simplicia emittunt

“... ut biennion novitiatus absoluto, omnes qui in Societate perseverare voluerint, tria vota substantialia quidem, paupertatis, castitatis et oboedientiae, simplicia tamen, emittere debeant ac novitii esse desinant”: Gregorius XIII, “Quanto fructuosius”, 1583, (Inst. I, 88a); Id., “Ascendente Domino”, 1584, (Inst. I, 91b).

19 4. Vota haec conditionat sunt

“... et in Scholares admittuntur, quorum utrique, ... vota sua ..., non quidem sollemnia ..., sed quibus teneantur quamdiu Praepositus Generalis in Societate eos retinendos esse censuerit, emittere debeant, ...”: Formula n. 9; Iulius III, “Exposcit debitum”, 1550, (Inst. I, 26b).

“... ut Scholares approbati, alii vero ut Coadiutores temporales nondum formati, cooptantur; ac quantum est ex parte ipsorum perpetuo, ex parte vero Societatis, iuxta apostolica indulta et constitutiones praedictas, tamdiu obligati sunt, quamdiu Praeposito Generali eos in Societate retinendos esse censuerit”: Gregorius XIII, “Ascendente Domino”, 1584, (Inst. I, 92a).

20 5. Haec sunt substantialia Religionis vota et ea emittentes veri Religiosi fiunt

“... statuimus ac etiam decernimus, ... etiam alios omnes et quoscumque, qui in ipsa Societate admissi, biennio Probationis a quocumque peracto, tria vota praedicta, temetsi simplicia, emiserint emittentque in futurum, vere et proprie Religiosos fuisse et esse, et ubique semper et ab omnibus censi et nominari debere, ac si in Professorum praedictorum numerum adscripti fuissent”: Gregorius XIII, “Quanto fructuosius”, 1583, (Inst. I, 89b-90a).

“statuimus ... tria vota huiusmodi, etsi simplicia, esse vere substantialia Religionis vota, ac in dicta Societate tamquam in Religione approbata per Sedem

eandem admissa fuisse ac esse, ac per Nos admitti;" Gregorius XIII, "Ascendente Domino", 1584, (Inst. I, 96a).

21 6. Impedimentum dirimens matrimonii constituunt

"... nec ante ... a Societate dimissionem, matrimonium contrahere [possunt]; quin immo eso omnes ad contrahendum inhabiles, ac contractas huiusmodi nullos et irritos esse, prout irritos facimus et annullamus;": Gregorius XIII, "Ascendente Domino", 1584, (Inst. I., 96b).

22 7. Quartum votum ingrediendi Societatem

"... ac secundum illas [Constitutiones] promittunt se eandem Societatem ingressuros, hoc est ulteriorem aliquem illius gradum, prout Praeposito videbitur Generali": Gregorius XIII, "Ascendente Domino", 1584, (Inst. I, 91b).

23 8. Tertiam probationem facere debent

"Scholares vero, studiis in Societate absolutis, antequam Professi vel Coadiutores formati fiant, ... tertium adhuc ulterioris Probationis annum in devotionis et humilitatis officiis impendunt ...": Gregorius XIII, "Ascendente Domino", 1584, (Inst. I, 92a).

24 9. Ad Sacerdotium vel gradus non est aspirandum

"... laicos vel alios non Sacerdotes, ad sacerdotium, vel eosdem aut qui Sacerdotes sunt, ad Professionem aut cuiusvis alterius gradus mutationem aspirare non debere": Gregorius XIV, "Ecclesiae catholicae", 1591, (Inst. I, 122b).

3. Scholasticorum collegia

25 1. Possibilitas habendi Collegia pro Scholaribus Societatis

"... possit Professa Societas, ad studiorum commoditatem, Scholarium habere Collegia, ...": Formula n. 8; Iulius III, "Exposcit debitum", 1550, (Inst. I, 25b).

26 2. Collegia habere possunt proprietates et redditus

"... quae Collegia possint habere redditus, census et possessiones, usibus et necessitatibus Studentium applicandas": Formula n. 8; Iulius III, "Exposcit debitum", 1550, (Inst. I, 25b).

27 **3. Collegiorum gubernatio est penes Societatem**

“... retenta penes Praepositum vel Societatem omnimoda gubernatione seu superintendentia super dicta Collegia et praedictos Studentes”: Formula n. 8; Iulius III, “Exposcit debitum”, 1550; (Inst. I, 25b).

4. Paupertas

28 **1. Paupertas Societatis: ius civile ad bona stabilia, redditus et proventus habere non potest**

“... nec etiam Societas ipsa communiter posset pro Societatis sustentatione aut usu, ad bona aliqua stabilia, aut proventus seu introitus aliquos, ius aliquod civile acquirere, sed essent contenti usum tantum rerum sibi donatarum ad necessaria sibi comparanda recipere”: Paulus III, “Iniunctum Nobis”, 1544, (Inst. I, 8a).

2. Paupertas professorum eorumque domorum

29 **2.1. Nec privatim nec in communi ius habere possunt ad bona stabilia et ad redditus et proventus:**

“... sic voveant singuli et universi perpetuam paupertatem ut non solum privatim, sed neque etiam communiter possint Professi, vel ulla eorum Domus aut ecclesia, ad aliquos proventus, redditus, possessiones, sed nec ad ulla bona stabilia, praeter ea, quae opportuna erunt ad usum proprium et habitationem, retinenda, ius aliquod civile acquirere, ...”: Formula n.7; Iulius III, “Exposcit debitum”, 1550, (Inst. I, 25a); cfr. Gregorius XIII, “Quanto fructuosius”, 1583, (Inst. I, 88b).

30 **2.2 Domus aut collegia non possunt pro eis in eorum bonis succedere:**

“Nec propter amissa ... vota, aut per mortem ab intestato, in illorum (Coadiutorum), sicuti nec in Professorum bonis, Domus ulla aut ecclesia vel Collegium dictae Societatis succedere potest”: Gregorius XIII, “Ascendente Domino”, 1584, (Inst. I, 93a).

3. Paupertas Coadiutorum formatorum

31 **3.1 Nihil proprium habere possunt:**

“Quibus [votis] emissis, eo ipso nihil omnino proprii amplius vel domi vel foris habere possunt”: Gregorius XIII, “Quanto fructuosius”, 1583, (Inst. I, 88b); Idem, “Ascendente Domino”, 1584, (Inst. I, 92b-93a).

- 32 **3.2 Hereditariae successionis incapaces sunt:**
 “... Quibus [votis] emissis, eo ipso ..., fiunt[que] incapaces cuiusvis hereditariae successionis”: Gregorius XIII, “Quanto fructuosius”, 1583, (Inst. I, 88b); Id., “Ascendente Domino”, 1584, (Inst. I, 92b-93a).
- 33 **3.3 Nec pro eis in eorum bonis domus aut collegia succedunt:**
 “Nec propter emissa huiusmodi vota publica, aut per mortem ab intestato, in illorum ... bonis, Domus ulla aut ecclesia vel Collegium dictae Societatis succedere potest”: Gregorius XIII, “Quanto fructuosius”, 1583, (Inst. I, 88b); Id., “Ascendente Domino”, 1584, (Inst. I, 93a).
- 34 **4. Ministeria gratis exercenda sunt**
 “... [ministeria illa] gratis omnino et nullo, pro suo in praedictis omnibus labore, stipendio accepto, se utilem exhibeat”: Formula n. 1; Iulius III, “Exposcit debitum”, 1550, (Inst. I, 23a).
- 35 **5. Tenor vitae quoad victum et vestitum et caetera exteriora, qualis honestorum sacerdotum**
 “... et in iis, quae ad victum et vestitum et caetera exteriora pertinent, honestorum Sacerdotum communem et approbatum usum sequantur”: Formula n.8; Iulius III, “Exposcit debitum”, 1550, (Inst. I, 26a).
- 36 **6. Societas est ordo mendicans**
 “... motu proprio ... et certa scientia, ... illam [Societatem] et illius Praepositum, ac singulas personas Societatis huiusmodi, vere et non fecte Mendicantes fuisse, esse et fore, ... apostolica auctoritate, tenore praesentium perpetuo sanctimus, volumus et declaramus”: Pius V, “Cum indefessae”, 1571, (Inst. I, 47b).
- 5. Oboedientia sociorum**
- 37 **5.1 Oboedientiae votum:**
 “Voveant etiam singuli se in omnibus, quae ad Regulae huius nostrae observationem faciunt, Societatis Praeposito ... oboedientes fore”: Formula n.6; Iulius III, “Exposcit debitum”, 1550, (Inst. I, 25a).
- 38 **5.2 Perfectio oboedientiae:**
 “Singuli vero subditorum ... non solum Praeposito in omnibus ad Institutum Societatis pertinentibus parere semper tenantur; sed in illo Christum

veluti praesentum agnoscant, et, et quantum decet, revereantur”: Formula n. 6; Iulius III, “Expescit debitum”, 1550, (Inst. I, 25a).

39 5.3 Missiones non sunt procurandae:

“Intelligent singuli, sibi, per se vel per alium, de huiusmodi missionibus quidquam cum Romano Pontifice non esse curandum, sed omnem hanc curam Deo, et ipsi Pontifici, tamquam Eius Vicario, et Societatis Praeposito dimittendam”: Formula n.5; Iulius III, “Expescit debitum”, 1550 (Inst. I, 251).

6. Congregatio generalis

40 1. Eius composito

“Consilium vero necessario convocandum ad condendas vel immutandas Constitutiones, et alia graviora, ..., intellegatur esse maior pars totius Professae Societatis (iuxta Constitutionum nostrarum declarationem) quae sine magno incommodo potest a Praeposito Generali convocari”: Formula n.2; Iulius III, “Expescit debitum”, 1550, (Inst. I, 24a).

41 2. Auctoritatem condendi Constitutiones habet

“... Praepositus, de consilio consciorum, Constitutiones ad constructionem huius nobis propositi finis conducentes condendi, maiori suggragiorum parte semper statuendi ius habente ... auctoritatem habeat”: Formula n.2; Iulius III, “Expescit debitum”, 1550, (Inst. I, 24a).

3. Competentia Congregationis

42 3.1 Constitutiones condere et immutare:

“Consilium vero necessario convocandum ad condendas vel immutandas Constitutiones ...”: Formula n. 2; Iulius III, “Expescit debitum”, 1550, (Inst. I, 24a).

43 3.2 Alia graviora negotia tractare:

“... et alia graviora, ut alienare vel dissolvere Domus el Collegia semel erecta, ...”: Formula n. 2; Iulius III, “Expescit debitum”, 1550, (Inst. I, 24a).

44 3.3 Quae in Constitutionibus et Congregationum Gneralium Decretis statuta est:

“... motu, scientia, et potestatis plenitudine similibus statuimus, decernimus et ordinamus, ut in Societatis praedictae Congregationibus quibuscumque, eo prorsus modo procedatur, atque ea tantum tractentur et definiantur, quae in Constitutionibus ac Congregationum Generalium decretis

statutum iam est vel in posterum statuentur, ut in eisdem Congregationibus tractentur ac definiantur”: Gregorius XIV, “Ecclesiae catholicae”, 1591; (Inst. I, 121a).

45 4. Non periodice, aut temporibus fixis celebranda est

“... motu proprio, et ex certa scientia et matura deliberatione Nostris ... Congregationum Generalium in praedicta Societate convocationes atque celebrationes ad normam praedictarum Constitutionum a S. Ignatio conditarum reducimus”: Benedictus XIV, “Devotam maiori”, 1746; (Inst. I, 267b).

7. *Aliae Congregationes quaecumque*

46 1. Earum competentia

“... in Societatis praedictae Congregationibus quibuscumque, eo prorsus modo procedatur, atque ea tantum tractentur et definiantur, quae in Constitutionibus ac Congregationum Generalium decretis statutum iam est vel in posterum statuentur, ut in eisdem Congregationibus tractentur ac definiantur”: Gregorius XIV, “Ecclesiae catholicae”, 1591, (Inst. I, 121a).

8. *Praepositus Generalis*

47 1. Plean potestate statim post electionem instruitur

“... Praepositus Generalis dictae Societatis, pro tempore existens, cum primum iuxta Constitutiones eiusdem societatis in illius Praepositum electus fuerit eo ipso verus ipsius Religionis Praepositus, cum libera, generali et omnimoda cura et administratione omnium et singulorum ... sit et esse censeatur”: Paulus III, “Licet debitum”, 1549, (Inst. I, 14a).

48 2. Postest nonnumquam amoveri et substitui

“... possitque et debeat dictus Praepositus, per personas ad id a dicta Societate facultatem habentes et ad id deputatas in certis casibus iuxta dictas Constitutiones amoveri, et alius ipsius loco per easdem personas substitui”: Paulus III, “Licet debitum”, 1549, (Inst. I, 14a).

49 3. Eius munus perpetuum est

“... motu proprio, et ex certa scientia ac mera deliberatione Nostris, deque apostolica potestatis plenitudine ... perpetuitatem Praepositi Generalis Societatis huiusmodi, iam diu stabilitam et in eadem Societate usu receptam et solitam, ac ipsum Praepositum ad vitam eligendi usum et consuetudinem ...

approbamus et confirmamus”: Paulus V, “Quantum religio”, 1606, (Inst. I, 134b).

50 4. Romae residet

“... illiusque [Praepositi] in Urbe ordinariam residentiam ... approbamus et confirmamus”: Paulus V, “Quantum Religio”, 1606, (Inst. I, 134b).

51 5. Unitas eiusdem gubernationis in tota Societate

“... et ipsius Societatis unitatem, et omnium nationum sub uno capite collectionem, in dictis Constitutionibus sanctitam; ... approbamus et confirmamus”: Paulus V, “Quantum Religio”, 1606, (Inst. I, 134b).

52 6. Auctoritas eius in rebus non gravioribus

“In aliis, quae non ita magni momenti sunt, idem Praepositus adiutus, quatenus ipse opportunum iudicabit, fratrum suorum consilio, per seipsum ordinandi et iubendi, quae ad Dei gloriam et commune bonum pertinere in Domino videbuntur, ius totum habeat, prout in Constitutionibus eisdem explicabitur”: Formula n.2; Iulius III, “Exposcit debitum”, 1550, (Inst. I, 24a).

53 7. Facultatem habet dubia de Constitutionibus declarandi

“... si quid vero dubii de eisdem [Constitutionibus] oriri contigerit, ad Sedem praedictam, vel ad Generalem Praepositum dictae Societatis, aut ad eos, quibus id ipse commiserit, referatur”: Gregorius XIII, “Ascendente Domino”, 1584; (Inst. I, 97a).

54 8. Auctoritatem habet eundi et mittendi in missiones

“... ac ipsemet Praepositus pro tempore existens ire, et suos, quocumque locorum, etiam inter infideles, cum expedire in Domino iudicabit, mittere et revocare ... libere et licite valeat”: Paulus III, “Licet debitum,” 1549, (Inst. I, 14a).

55 9. Superiores eligit

“Electio vero Superiorum, tam Provincialium et Visitorum, quam quorumcumque localium, tota sit penes Praepositum Generalem iuxta Constitutiones easdem”: Gregorius XIV, “Ecclesiae catholicae”, 1591, (Inst. I, 121a).

56 10. Officia distribuit

“... et officiorum discretio ac distributio tota sit in manu Praepositi Generalis ..., vel eorum, quos ipse sibi ea cum auctoritate substituerit ...”: Formula n. 2; Iulius III, “Exposcit debitum”, 1550 (Inst. I, 24a).

57 11. Gradum uniuscuiusque discernit et ad eum promovet

“... graduum etiam discretio et iudicium, ac Coadiutorum tam spiritualium quam temporalium, simulque et Professorum promotio, iuxta eiusmodi Constitutiones similiter sit in manu Praepositi Generalis”: Gregorius XIV, “Ecclesiae catholicae”, 1591, (Inst. I, 121b).

58 12. Gubernatio eius paterna esse debet

“... et in praelatione sua benignitatis ac mansuetudinis caritatisque Christi, Petri Paulique semper sit memor”: Formula n. 6; Iulius III, “Exposcit debitum”, 1550, (Inst. I, 25a).

8. *Aliae normae*

59 1. Ad officium in choro dicendum non sunt obligati

“Socii autem omnes, cum presbyteri esse debeant, ad dicendum officium secundum communem Ecclesiae ritum, sed privatim, et non communiter vel in choro, teneantur”: Formula n. 8; Iulius III, “Exposcit debitum”, 1550, (Inst. I, 26a).

60 2. Dignitates ecclesiasticae acceptandae non sunt

“Ac volumus, statuimus et ordinamus, quod Praepositus absque Societate, et aliquis ex Sociis huiusmodi absque dicti Praepositi consensu et expressa licentia, electioni seu provisioni de illius persona in Episcopum, Archiepiscopum, aut ad aliam quamcumque dignitatem ... pro tempore factae, consentire; aut ad illam admitti, ... capax nullatenus esse possit”: Paulus III, “Licet debitum”, 1549, (Inst. I, 14b).

61 3. Solus Romanus Pontifex dignitatis ecclesiasticae extra Societatem acceptionem praecipere potest

“... motu proprio certaue scientia ac matura deliberatione Nostris deque apostolicae potestatis plenitudine, ... declaramus ... neminem Superiorem Regularem, etiam Generalem, aut Capitulum, seu Congregationem Generalem, ... nec quemlibet alium, etiam speciali et individua mentione dignum, sed tantummodo Nos et Romanum Pontificem pro tempore existentem posse ... aliquod praeceptum procurandi seu acceptandi, vel aliud simile ipsis Regularibus

voventibus facere, cuius vigore praedicti Religiosi illas et illos procurare vel acceptare possint aut teneantur ...”: Urbanus VIII, “Honorum dignitatumque”. 1643, (Inst. I, 175b-176a).

62 4. Dominium bonorum Congregationum Marianarum in Domibus et Collegiis Societatis erectarum penes eam est

“... motu, scientia et potestatis plenitudine paribus, perpetua statuimus, decernimus et mandamus, ut Congregationes praefatae iam erectae, et quandocumque deinceps erigendae in Collegiis et Domibus regularibus eiusdem Societatis, ita dictis Collegiis et Domibus, in quibus erectae existunt, unitae et incorporatae sint et esse debeant et intellegantur, ut earundem Congregationum congregati seu confratres nullum ius, nullumque dominium, nullamque actionem supra aedes, vasa, mobilia, ornamenta et suppellectilia quaecumque, tam sacra quam profana, ad easdem Congregationes nunc et pro tempore quandocumque spectantia et pertinentia, ac pro illorum usu et ornatu empta et emenda habeant, nec habere possint”: Benedictus XIV, “Laudabile Romanorum”, 1758, (Inst. I, 307b-308a).

FINIS

Text of the “Quinque Capitola”

PRIMA SOCIETATIS JESU INSTITUTI SUMMA I⁵

[1] Dilectis filiis Ignation de Loyola, Petro Fabro, Iacobo Laines, Claudio Iayo, Paschasio Broet, Francisco Xauier, Alfonso Salmeroni, Simoni Roderico, Ioanni Coduri, Nicolao de Bobadilla, magistris parisiensibus, pampilonensis, gebenensis, seguntinae toletanae, bissentinae, ehredunensis, et palentinae respectiue diocesum. Cum ex plurium sermone saepe intellexissemus vos sponte pauperes Christi sacerdotes e diuersis mundi regionibus in vnum conuenisse et Spiritu Sancto, ut credimus, impellente, in hanc vnam voluntatem conspirasse, ut, relictis seculi huius illecebris, vitam vestram perpetuo Domini nostri Jesu Christi atque eius in terris vicarii seruitio dedicaretis; cum que probate fidei viri nobis saepius testati essent, vos per plures iam annos laudabiliter in vinea Domini exerceri, predicando publice verbum Dei, exhortando priuatim, confessiones audiendo, exercendo homines in meditationibus piis, inseruendo hospitalibus, peregrinando, pueros et personas rudes docendo ea quae ad christiani hominis institutionem sunt necessaria, et omnia demum charitatis officia, vbicumque terrarum fuistis, non modo sine vlla haeresis aut auaritiae aut turpitudinis alicuius nota, sed multa etiam cum laude obeundo: cum hec, inquam, de vobis audiremus, gaudebamus, vt par est, ac magnopere optabamus, multos, imo omnes, si fieri possit, et praesertim clericos veteris conuersationis exempla (quod vos facitis) renouare; dumque animo voluebamus aliquod signum edere, quo vestram hanc pietatem ac religionem gratam esse nobis declararemus, dilectus filius noster cardinalis Contarinus narrauit nobis hoc vestrum vite institutum et a multis laudari et a quibusdam ita probari, ut illud etiam sequi velint, vosque omnes valde cupere ad conseruandam ac perficiendam vestre Societatis in Christo vnionem, illa omnia, que vsu comperistis ad propositum vobis finem conducentia, scripto iam et obedientie vinculo stabilire; ideoque supplicare, ut in his nostris pene assiduis grauissimisque occupationibus per aliquem a nobis delegatum consideretur an vestra viuendi formula euangelicis consiliis et canonicis patrum sanctionibus sit conformis, et comperta eius cum christiane religionis puritate congruentia, de more a nobis benedicatur atque approbetur; que vestra petitio cum animum nostrum bene de vobis iam dudum sentientem reperisset, illico negotium hoc dilecto filio Thome Badie, sacri nostri palatii magistro delegauimus; qui, re mature perspecta, nobis retulit vniuersum propositum Societatis vestre pium sibi sanctumque videri, summamque regule, quam seruare cupitis, infrascriptis quinque capitulis contineri.

[2] Primum. Quicumque in Societate nostra, quam Jesu nomine insigniri cupimus, vult sub crucis vexillo Deo militare et soli Domino atque eius in terris vicario seruire, post solemne perpetue castitatis votum proponat sibi in animo, se partem esse communitatis ad hoc potissimum institutae, ut ad profectum animarum in vita et doctrina christiana, et ad fidei propagationem per verbi ministerium, spiritualia exercitia et charitatis opera, et nominatim per puerorum ac rudium in christianismo institutionem, praecipue intendat, curetque primo Deum, deinde huius sui instituti rationem, que via quedam est ad illum, semper ante oculos habere, et finem hunc sibi a Deo propositum totis viribus assequi; vnusquisque tamen, secundum gratiam sibi a Spiritu Sancto subministratam, et vocationis suae proprium gradum, ne quis forte zelo vtatur, sed non secundum scientiam. Cuius proprii cuiusque gradus iudicium et officiorum discretio ac distributio tota sit

⁵Text in *ConstMHSJ*, 1, pp. 14-21.

in manu propositi seu prelati per nos eligendi, ut congruus ordo seruetur in omni bene instituta communitate necessarius. Qui quidem praepositus de consilio fratrum Constitutiones ad constructionem huius propositi nobis finis conducentes, in consilio condendi auctoritatem habeat, maiori suffragiorum parte semper statuendi ius habente. Consilium vero intelligatur esse in rebus quidem grauioribus ac perpetuis maior pars totius Societatis, quae a preposito commode conuocari poterit; in leuioribus autem et temporaneis, omnes illi, quos in loco, ubi praepositus noster residebit, praesentes esse contigerit. Exequendi autem et iubendi ius totum penes praepositum erit.

[3] 2m. Sciant omnes sodales, et non solum imprimis professionis suae foribus, sed quoad vixerint, quotidie animo voluant, Societatem hanc vniuersam et singulos sub sanctissimi Domini nostri Pauli tertii et successorum eius fidei obedientia Deo militare, atque ita sub vicarii Christi imperio diuinaeque eius potestate subesse, ut non solum ei iuxta commune clericorum omnium debitum parere, sed etiam voti vinculo ita alligari ut quicquid sanctitas eius iusserit ad profectum animarum et fidei propagationem pertinens, sine ulla tergiuersatione aut excusatione, illico, quantum in nobis fuerit, exequi teneamur, siue miserit nos ad turcas, siue ad orbem nouum, siue ad luteranos, siue ad alios quoscumque infideles seu fideles. Quamobrem qui ad nos accessuri sunt, et antequam huic oneri humeros supponant, diu multumque meditentur an tantum pecuniae spiritualis in bonis habeant, ut turrim hanc, iuxta consilium dominicum possint consummare: hoc est, an Spiritus Sanctus, qui illos impellit, tantum illis gratiae polliceatur, ut huius vocationis pondus, illo adiuuante, se laturos sperent; et postquam, Domino inspirante, huic Jesu Christi militie nomen dederint, diu noctuque succincti lumbos et ad tam grandis debiti solutionem prompti esse debebunt. Ne qua autem possit esse inter nos missionum ac prouinciarum huiusmodi aut ambitio aut detractatio, profietantur singuli se nunquam directe aut indirecte de huiusmodi missionibus quicquam cum pontifice curaturos, sed omnem hanc curam Deo et eius vicario et Societatis praeposito dimissuros. Qui praepositus, sicut caeteri, etiam profiteatur se nihil de suimetipsius missione in alterutram partem, nisi de consilio Societatis, cum pontifice esse curaturum.

[4] 3m. Voueant singuli se in omnibus, quae ad regule huius nostrae obseruationem faciunt, obedientes fore Societatis praeposito. Ille autem iubeat ea quae ad constructionem propositi sibi a Deo et a Societate finis cognouerit esse opportuna; in praelatione autem sua benignitatis ad mansuetudinis charitatisque Christi, et Petri Paulique formulae semper sit memor, et tam ipse quam consilium ad normam hanc assidue spectent, et nominatim commendatam habeant institutionem puerorum ac rudium in christiana doctrina decem praeceptorum, atque aliorum similium rudimentorum, quaecumque secundum circumstantias personarum, locorum et temporum illis congrua videbuntur. Est enim maxime necessarium, circa prouidentiam huius rei, diligenter praepositum et consilium inuigilare, cum et in proximis aedificium fidei sine fundamento non possit consurgere, et in nostris periculum sit, ne, ut quisque erit doctior, ita prouinciam hanc tanquam primo aspectu minus speciosam, forsitan detractare conetur; cum tamen re uera nulla sit fructuosior, vel proximis ad aedificationem, vel nostris ad charitatis et humilitatis simul officia exercenda. Subditi uero, tum propter ingentes ordinis utilitates, tum propter nunquam satis laudatum humilitatis assiduum exercitium, praeposito in omnibus ad institutum Societatis pertinentibus parere semper teneantur, et in illum Christum, veluti praesentem agnoscant et quantum decet venerentur.

[5] 4m. Cum experti fuerimus iucundiores, puriores et ad proximi aedificationem aptiores esse vitam ab omni auaritiae contagione quam remotissimam et euangelicae paupertati quam

simillimam, cumque sciamus Dominum nostrum Jesum Christum seruis suis, regnum Dei solum inquiringentibus, necessaria ad victum et vestitum esse sumministraturum, voueant singuli et vniuersi perpetuam paupertatem, declarantes quod non solum priuatim, sed nec etiam communiter possint, pro Societatis sustentatione aut vsu, ad bona aliqua stabilia aut ad prouentus seu introitus aliquos ius aliquod ciuile acquirere, sed sint contenti vsu tantum rerum necessariarum, volentibus dominis, gaudere, et pecunias ac precia rerum sibi donatarum, ad necessaria sibi comparanda recipere. Possint tamen, ad colligendos aliquos bone indolis scholasticos et in locis vniuersitatum litteris presertim sacris imbuendos, ad bona stabilia et ad prouentus ius ciuile acquirere, sustentandorum scilicet scholasticorum illorum causa, qui in spiritu et litteris proficere et in Societate nostra, exacto sui studii tempore post probationem demum recipi cupiant.

[6] 5m. Sotii omnes, quicumque in sacris fuerint, quamuis ad beneficia et introitus nullum ius acquirere possint, teneantur tamen ad dicendum officium secundum Ecclesiae ritum, non tamen in choro, ne ab officiis charitatis, quibus nos totos dedicauius, abducantur. Quamobrem nec organa aut musicos canendi ritus, missis aut reliquis officiis suis adhibeant; ista enim, que laudabiliter clericorum ac religiosorum reliquorum diuinum cultum exornant, et ad excitandos ac flectendos pro ratione hymnorum ac misteriorum animos fuerunt inuenta, nobis non mediocri impedimento esse experti sumus, cum iuxta vocationis nostre formam, praeter caetera necessaria officia, nos in consolandis etiam corpore vel animo aegrotis magnam diei atque etiam noctis partem frequenter esse oporteat occupatos.

[7] Hec sunt que de nostra professione type quodam explicare potuimus, quod nunc facimus ut summatim scriptione hac informaremus tum illos qui nos de nostro vite instituto interrogant, tum etiam posteros nostros si quos, Deo volente, imitatores unquam habebimus huius viae. Quam, cum multas magnasque habere adnexas difficultates fuerimus experti, opportunum iudicauimus illos praemonere, ne, recti specie, in haec duo, quae nos vitauimus, impingant. Vnum est ne qua ieiunia, disciplinas, pedum capitisque nuditates, vestium colores, ciborumque differentias, penitentias, cilicia et alias carnis macerationes sub vinculo peccati mortalis sotiis imponant; quae tamen non ideo prohibemus, quia illa damnamus, cum in hominibus qui haec obseruant illa valde laudemus ac suspiciamus, sed tantum quia nolumus nostros aut tot oneribus simul iunctis opprimi, aut ab exercendis quae nobis proposuimus excusationem aliquam cessandi pretendere. Possit tamen vnusquisque [*sic*], praeposito non prohibente, i allis devote se exercere quae sibi necessaria vel vtilia esse cognouerit. Alterum, ne quis in Societate recipiatur nisi diu ac diligentissime prius fuerit probatus; cumque prudens in Christo et vel doctrina vel vitae sanctitate apparuerit conspicuus, tum demum admittatur ad Jesu Christi miliciam, qui tenuibus coeptis nostris fauere dignetur ad gloriam Dei Patris, cui soli semper sit decus et honor in secula. Amen.

[8] Hanc vestram vite formam, suprascriptis quinque capitulis contentam, cum perlegerimus et ad spiritualem profectum Societatis ipsius vestre et reliqui christiani gregis, cuius cura nobis incumbit, iudicauerimus fore opportunam, vigore praesentium illam laude dignam esse declaramus atque apostolica auctoritate approbamus, benedicimus, roboramus, et sub tutela huius sanctae sedis recipimus atque confirmamus, facultatem vobis concedentes condendi particulares inter uos Constitutiones, quas go ad Societatis vestrae finem et Jesu Christi Domini nostri gloriam [148r] et proximi vtilitatem conformes esse iudicaueritis. Agite igitur, dilecti in Christo filii, vestram vocationem sequimini, quo vos ducit Spiritus Sanctus, et in vinea Domini posthac, sub protectione huius sanctae sedis, tanquam boni agricolae viriliter laborate, Domino nostro Jesu Christo vobis fauente, qui viuit et regnat cum Spiritu Sancto Deus in seculorum secula. Amen.

[9] Ego G. Cardinalis Contareus fidem facio quod Tibure legi quinque suprascripta capitula sanctissimo patri nostro, pretermisis prohaemio et epilogo ultimo, quae intellecta sanctitas sua approbavit ac concessit ut fieret bulla uel breue, prout melius videretur, iuxta relationem R.^{di} Magistri sacri pallatii, cui per me sua beatitudo iniunxerat, ut, re bene considerata, referret quid sentiret.

Idem manu propria scripsi et subscripsi.

The Five Chapters, 1539⁶

CHAPTER 1

Whoever desires to serve as a soldier of God beneath the banner of the cross in our Society, which we desire to be designated by the name of Jesus, and to serve the Lord alone and His vicar on earth, should, after a solemn vow of perpetual chastity, keep what follows in mind.

He is a member of community founded chiefly for this purpose: to strive especially for the progress of souls in Christian life and doctrine and for the propagation of the faith by the ministry of the word, by Spiritual Exercises, by works of charity, and expressly by the education of children and unlettered persons in Christianity.

Still further, let any such person take care to keep always before his eyes first God, and then the nature of this Institute which is, so to speak, a pathway to God; and then let him strive with all his effort to achieve this end set before him by God — each one, however, according to the grace which the Holy Spirit has given to him and according to the particular grade of his own vocation, lest anyone should perhaps show zeal, but a zeal which is not according to knowledge.

The decision about each one's grade and the selection and entire distribution of employments shall be in the power of the superior general or ordinary who is to be elected by us, in order that the proper order necessary in every well-organized community may be preserved.

The superior general, with the advice of the brethren, shall possess the authority, in council (a majority of votes always having the right to decide), to draw up constitutions leading to the achievement of this end which has been proposed to us.

In matters that are more serious and lasting, the council should be understood to be the greater part of the whole Society which can conveniently be summoned by the superior general; in lighter and more temporary matters it will be all those who happen to be present in the place where our superior resides. All right to execute and command, however, will be in the power of the superior.

CHAPTER 2

All the companions should know and daily bear in mind, not only when they first make their profession but as long as they live, that this entire Society and each one individually are campaigning for God under faithful obedience to His Holiness Paul III and are thus under the command of the vicar of Christ and his divine power not only because we are bound by the obligation common to all clerics, but also by the vow we make to carry out without subterfuge or excuse and at one (as far as in us lies) whatever His Holiness may order pertaining to the

⁶ English translation by Ignacio Echániz in De Aldama's *The Formula of the Institute: Notes for a Commentary*, pp. 2-22 even; original Latin text in *ConsMHSJ* 1, pp. 15-21.

progress of souls and the propagation of the faith, whether he decides to send us among the Turks, or to the New World, or to the Lutherans, or to any others whether infidels or faithful.

Therefore, before those who will come to take this burden upon their shoulders, they should ponder long and seriously, as the Lord has counseled, whether they possess among their resources enough spiritual capital to complete this tower; that is, whether the Holy Spirit who moves them is offering them so much grace that with His aid they have hope of bearing the weight of this vocation. Then, after they have enlisted through the inspiration of the Lord in this militia of Christ, they ought to be prompt in carrying out this obligation which is so great, being clad for battle day and night.

However, to forestall among us any ambition for such missions or provinces or any refusal of them, let each one promise never to carry on negotiations with the Roman pontiff about such missions directly or indirectly, but leave all this care to God and to His vicar and to the superior of the Society. This superior, too, just like the rest, shall also promise not to approach the pontiff at all either one way or another concerning a mission of his own, except with the advice of the Society.

CHAPTER 3

All should likewise vow that in all matters that concern the observance of this Rule they will be obedient to the one put in charge of the Society.

The latter, however, should issue the commands which he knows to be opportune for achieving the end set before him by God and the Society.

In his superiorship he should be ever mindful of the kindness, meekness, and charity of Christ and of the pattern set by Peter and Paul, a norm which both he and the council should keep constantly in view. Particularly let them hold esteemed the instruction of the children and the unlettered in the Christian doctrine of the Ten Commandments and other similar rudiments, whatever will seem suitable to them in accordance with the circumstances of persons, places, and times. For it is very necessary that the superior and the council give this matter the most diligent attention since the edifice of faith cannot arise among our fellowmen without a foundation, and since there is the danger that as one becomes more learned he may disregard this occupation, less prestigious at first glance, when none in fact is more fruitful either for the neighbor to be edified or for Ours to discharge occupations that combine both humility and charity. Assuredly, too, the subjects, both because of the great value of good order and for the sake of the constant practice of humility, never sufficiently praised, should always be obliged to obey the general in all matters pertaining to the Society's Institute and to recognize and properly venerate Christ as present in him.

CHAPTER 4

From experience we have learned that a life removed as far as possible from all contagion of avarice and as like as possible to evangelical poverty is more gratifying, more undefiled, and

more suitable for the edification of our fellowmen. We likewise know that our Lord Jesus Christ will supply to His servants who are seeking only the kingdom of God what is necessary for food and clothing.

Therefore our members, one and all, should vow perpetual poverty, declaring that they cannot, either individually or in common, acquire any civil right to any stable goods or any produce or fixed income for the maintenance or use of the Society. Rather let them be content to enjoy only the use of necessary things with the owners permitting, and to receive the money and the value of things given them in order to buy necessities for themselves.

They may, however, acquire the civil right to stable goods and to fixed income in order to bring together some talented students and instruct them, especially in sacred letters, in the universities, that is, for the support of those students who desire to advance in the spirit and in letters and at length to be received into our Society after probation when the period of their studies has been finished.

CHAPTER 5

All the members who are in holy orders, even though they can acquire no right to benefices and revenues, should nonetheless be obliged to recite the office according to the rite of the Church, but not in choir lest they be diverted from the works of charity to which we have fully dedicated ourselves. Hence too they should use neither organs nor singing in their Masses and other religious ceremonies; for these laudably enhance the divine worship of other clerics and religious and have been found to arouse and move souls, by bringing them into harmony with the hymns and rites, but we have experienced them to be a considerable hindrance to us, since according to the nature of our vocation, besides the other necessary duties, we must frequently be engaged a great part of the day and even of the night in comforting the sick both in body and in spirit.

CONCLUSION

These are the matters which we have been able to explain about our profession in a kind of sketch, which we now do in order to give brief information both to those who ask us about our plan of life and also to those who will later on follow us if, God willing, we shall ever have imitators along this path.

By experience we have learned that the path has many and great difficulties connected with it. Consequently we have judged it opportune to admonish those not to fall, under the appearance of good, into these two things we have avoided. One is not to impose on the companions under pain of mortal sin any fasts, disciplines, baring of feet or head, color of dress, type of food, penances, hairshirts, and other torments of the flesh. These, however, we do not prohibit because we condemn them, for we greatly praise and approve them in those who observe them; but only because we do not wish Ours either to be crushed by so many burdens together or to allege any excuse for not carrying out what we have set before ourselves. But everyone can exercise himself devoutly in the practices he deems to be necessary or useful for himself, provided the superior does not forbid him. The other is that no one be received into the Society unless he has first been

tested for a long time and very diligently; and only when he appears prudent in Christ and conspicuous either in learning or in holiness of life may he be admitted into the militia of Jesus Christ.

May Christ deign to be favorable to these our tender beginnings, to the glory of God the Father, to Whom alone be glory and honor forever. Amen.

TO ALL MAJOR SUPERIORS⁷

Dear Father,

The peace of Christ!

Various information which I have received from the Provinces in recent years has made me aware, and indeed with great satisfaction, that not a few Jesuits today are generously collaborating with particular Churches in different diocesan offices. Some of these offices, however, include the exercise of ecclesiastical power in the external forum. Moreover, some Provincials have asked me how they are to proceed when the Holy See proposes the naming of a Jesuit as bishop.

In this whole matter, let us first recall the prescriptions of our institute:

On one hand, all the professed vow to God “not to seek any prelacy or dignity outside the Society, and, as far as in them lies, not to consent to being chosen for a similar charge unless they are compelled by an order from him who can command them under pain of sin” (cf. Const. P. X, n. 6).

On the other hand, in virtue of our Constitutions, no Jesuit, even if not professed, “may accept any dignity outside the Society, without permission” of the Superior General; “nor will he give permission or approval if the command of the Apostolic See does not compel him” (cf. Const., P. IX, c. 3, n. 13).

Taking into consideration these prescriptions of our Institute as well as the urgent needs of some local Churches, it seems appropriate for me to ask the Holy Father to grant to me and to my successors the faculty, which cannot be delegated, by which in particular cases and according to the circumstances set forth in the request, I am able to dispense, in regard to diocesan offices below the episcopacy, from the simple vow by which the professed of the Society are bound not to accept any office which carries with it exercise of ecclesiastical power in the external forum.

The Holy Father has granted me this faculty. Therefore, without revoking present participation in the above-mentioned offices already accepted, from now on the following procedure will be followed. In particular cases and for the greater service of the Church, at the request of the bishop and with previous information provided by the Provincial, the Superior General will be able to dispense from the vow of the professed whenever there is question of accepting the office of Vicar General, Episcopal Vicar, Judicial Vicar, and Officialis, offices which include ecclesiastical jurisdiction in the external forum. In regard to Jesuits who are not professed, the Superior General will proceed in a similar way.

⁷ In the collection, *Documentation, Cur. Gen.*, 87\16, the 87 designating the year, the 16 designating the 16th letter of the superior general in that year.

Nothing, however, has been changed in regard to promotion to the episcopacy. Such proposed appointments may only be accepted by the professed when they are imposed by the Supreme Pontiff under pain of sin; other Jesuit priests may accept them only with the approval of the Superior General, who will give this approval only if compelled by obedience to the Holy See.

But since the Holy See does not impose episcopal appointments without the consent of the candidate, the first response on the part of a Jesuit can always be, and should be, a representation of our vow and of the obligations of our Institute approved and confirmed by the Holy See.

But if in an individual case the Holy See insists or if a Jesuit feels uneasy about his failure to give a positive response to the expressed desire of the Holy father, it seems to me that the following practical procedure can be recommended: let the Jesuit either directly or through his Provincial inform the Superior General so that together with him he may consider how best to respond to the spirit of our Institute and for the greater glory of God. For religious who are bound by vow not to accept episcopal appointments or who are impeded by strong prohibitions from accepting such appointments, it is appropriate to have recourse to their Superior General, nor can they be forbidden to do this.

However, if for grave reasons the Holy See especially presses the point and a Jesuit is named bishop, then let him accept this appointment and with a generous spirit work for the good of the Church to whose services our lives are dedicated. Let him foster closer relations according to the mind of our Constitutions (Const. P. X, n.6) between the Jesuit Bishop and the Society of Jesus, which remains his spiritual family.

I pray the Lord that these clarifications may inspire us as religious to labor "according to our proper vocation [...] in building up and increasing the whole Mystical Body of Christ and for the good of the particular Churches" (cf. Conc. Vat. II, decr. "Christus Dominus," n. 33).

I commend myself and the Society to your Masses and prayers.

Fraternally in Christ,

Peter-Hans Kolvenbach, S.J.
Superior General

Rome, 28 October 1987
Feast of the Apostles Simon and Jude

Part VII of The Constitutions of the Society of Jesus

**The distribution of the incorporated members
in Christ's vineyard and
their relations there with their followmen**

**Chapter I
Missions from the Holy Father**

[603] — 1. Just as Part VI treats of the duties which each member of the Society has in regard to himself, so Part VII deals with the members' duties toward their fellowmen (which is an end eminently characteristic of our Institute) when these members are dispersed to any part of Christ's vineyard, to labor in that part of it and in that work which have been entrusted to them. They may be sent to some places or others by the supreme vicar of Christ our Lord, or by the superiors of the Society, who for them are similiary in the place of His Divine Majesty; or they themselves may choose where and in what work they will labor, when they have been commissioned to travel to any place where they judge that greater service of God and the good of souls will follow; or they may carry on their labor, not by traveling but be residing steadily and continually in certain places where much fruit of glory and service to God is expected [A].

Since one's being sent on a mission of His Holiness will be treated first, as being most important, it should be observed that the vow which the Society made to obey him as the supreme vicar of Christ without any excuse, meant that the members were to go to any place whatsoever where he judges it expedient to send them for the greater glory of God and the good of souls, whether among the faithful or the infidels [B]. The Society did not mean any particular place, but rather that it was to be distributed into diverse regions and places throughout the world, and it desired to proceed more correctly in this matter by leaving the distribution of its members to the sovereign pontiff.

[604] — A. *These are the four more general ways of distribution into the vineyard of Christ our Lord. Each of them is treated in its own chapter in this Part VII.*

[605] — B. *The intention of the fourth vow pertaining to the pope was not to designate a particular place but to have the members distributed throughout the various parts of the world. For those who first united to form the Society were from different provinces and realms and did not know into which regions they were to go, whether among the faithful or the unbelievers; and therefore, to avoid erring in the path of the Lord, they made that promise or vow in order that His Holiness might distribute them for greater glory to God. They did this in conformity with their intention to travel throughout the world and, when they could not find the desired spiritual fruit in one region, to pass on to another and another, ever intent on seeking the greater glory of God our Lord and the greater aid of souls.*

[606] — 2. In this matter, the Society has placed its own judgment and desire under that of Christ our Lord and His vicar; and neither the superior for himself nor any individual member of the Society will be able for himself or for another to arrange or to try to arrange, directly or indirectly, with the pope or his ministers to reside in or to be sent rather to one place than another. The individual members will leave this entire concern to the supreme vicar of Christ and to the own superior [C]; and in regard to his own person the superior will in our Lord leave this concern to His Holiness and to the Society [D].

[607] — C. *When one of the subjects has been designated for some place or undertaking and it is judged that the supreme vicar of Christ, if well-informed, would not send him to it, the superior general may give him better information, while finally the entire matter to the decision of His Holiness.*

[608] — D. *“The Society” should be understood to mean those members of it who happen to be in the place where the general is. These could give good information to the sovereign pontiff when, because of different reports from others, he seemed to be about to send the general to some place which is not conducive to the common good of the Society and greater service to God.*

[609] — 3. Moreover, he who has been designated by His Holiness to go to some region should offer his person generously, without requesting provisions for the journey or causing a request for anything temporal to be made, except that His Holiness should order the member to be sent in the manner that His Holiness judges to be a greater service of God and of the Apostolic See, without taking thought about anything else [E].

[610] — E. *Representation may well be made, and even should be, through the agency of the prelate or person through whom His Holiness issues the command to go somewhere, by asking how he desires him to accomplish the journey and to remain in the destination, namely, by living on alms and by begging for the love of God our Lord, or in some other manner. This is asked that what seems better to His Holiness may be done with greater devotion and security in our Lord.*

[611] — 4. If his Holiness does not designate the person but orders that one or more should go to one region or another, and if he thus leaves it to the superior to judge who would be most fit for such a mission, the superior, while pondering the greater universal good and also the minimum damage possible to the other employments which are undertaken in the service of God our Lord, will designate in conformity with His Holiness' command those who are capable or more suitable for the mission.

[612] — 5. It is highly expedient that the mission should be entirely explained to the one who is thus sent, as well as the intention of His Holiness and the result in hope of which he is sent. This should be given to him in writing, if possible [F], that he may be better able to accomplish what is entrusted to him. The superior too will try to help him by what further counsels he can [G], that in everything God our Lord and the Apostolic See may be better served.

[613] — F. *If this help is not given, at least an effort should be made to procure by word of mouth the meaning which His Holiness intended, whether His Holiness explains it directly to the one who is to go or through the agency of the superior, or some prelate, or other person.*

[614] — *G. The superior can also be helpful by some instruction, not only in his own missions but also in those of His Holiness, in order to attain better the end which is sought in the service of Christ our Lord.*

[615] — 6. When they are sent to particular places without determination of the time by His Holiness, it is understood that the residence should last three months, and longer or shorter in proportion to the greater or less spiritual fruit which is seen to be reaped there or is expected elsewhere, or in accordance with what seems most expedient for some universal good. All this will be done according to the judgment of the superior, who will consider the holy intention of the pontiff and the service of Christ our Lord.

[616] — 7. When the residence in determined places must be prolonged and when it is possible without prejudice to the principal mission and intention of the sovereign pontiff, it will not be improper for the one on the mission to make some excursions to aid the souls in the neighboring regions and afterwards to return to his residence, if such excursions are possible and it appears to him that they could be fruitful in service to God our Lord. Likewise in the territory where he resides, he ought to attend with special care to the charge which was especially given to him and not to neglect it for other opportunities in the divine service, even good ones. Yet in addition to that charge he can and he ought to consider, but without prejudice to his mission, as has been said, in what other things he can employ himself for the glory of God and the good of souls. Thus he does not lose the opportunity for this which God sends him, to the extent that he will judge expedient in the Lord.

[617] — 8. In order to achieve better the end of our profession and promise, he who happens to be the superior general when a new vicar of Christ takes office should be obliged, either himself or through another and within the year after the pontiff's election and coronation, to manifest to His Holiness the profession and express promise which the Society has to be obedient to him, especially in regard to the missions, to the glory of God our Lord.

Chapter 2

The missions received from the superior of the Society

[618] — 1. To be able to meet the spiritual needs of souls in many regions with greater facility and with greater security for those who go among them for this purpose [A], the superiors of the Society, according to the faculty granted by the sovereign pontiff, will have authority to send any of the Society's members whomsoever [B] to whatsoever place these superiors think it more expedient to send them [C], although these members, wherever they are, will always be at the disposition of His Holiness.

However, there are many who request help while considering more their own spiritual obligations to their flocks, or other advantages not so immediately their own, rather than the common or universal benefits. Therefore the superior general, or whoever holds this authority from him,

ought to bestow much careful thought on missions of this kind in order that, when he sends subjects to one region rather than to another [D], or for one purpose rather than for another [E], or one particular person rather than another or several of them [F], in this manner or in that [G], for a greater or lesser time [H], that procedure may always be used which is conducive to the greater service of God and the universal good.

If the superior thinks, while holding fast to this thoroughly right and pure intention in the presence of God our Lord, that it is wise because of the difficulty or importance of the decision, he will commend the matter to His Divine Majesty and cause it to be commended in the prayers and Masses of the house. He will also discuss it with one or more members of the Society who happen to be present and whom he thinks suitable. Then he himself will decide about sending or not sending, and about the other circumstances, as he will judge to be expedient for greater glory to God.

The part of him who is sent will be, without interposing himself in favor of going to remaining in one place rather than another, to leave the disposition of himself completely and freely to the superior who in the place of Christ our Lord directs him in the path of His greater service and praise [I]. In similar manner, too, no one ought to try by any means to bring it about that others will remain in one place or go to another, unless he does so with the approval of his superior, by whom he should be governed in our Lord [K].

[619] — A. *The superior of the Society can more easily and more expeditiously make provision for many places (especially those remote from the Apostolic See), than would be the case if those who need members of the Society must always approach the sovereign pontiff. For the individual members, too, there is greater security if they go from obedience to their superiors rather than through their own decision (even if they were capable of making it), and not as men sent by him whom they have in place of Christ to direct them as the interpreter of His divine will.*

[620] — B. *Just as the general can perform the other functions by himself and through persons under him, so too can he perform this one of sending his subjects on missions, by reserving to himself the missions which he thinks should be thus reserved.*

[621] — C. *The sending of subjects "to whatsoever place these superiors think it expedient" means either among the faithful, even though it be in the Indies, or among the unbelievers, especially where there is a colony of believers, as in Greece and elsewhere. Where the inhabitants are more exclusively unbelievers, the superior should ponder seriously in the sight of God our Lord*

[622, a] — D. *To proceed more successfully in this sending of subjects to one place or another, one should keep the greater service and the more universal good before his eyes as the norm to hold oneself on the right course. It appears that in the vineyard of the Lord, which is so extensive, the following procedure of selection ought to be used. When other considerations are equal (and this should be understood in everything that follows), that part of the vineyard ought to be chosen which has greater need, because of the lack of other workers or because of the misery and weakness of one's fellowmen in it and the danger of their eternal condemnation.*

[b]. *Consideration should also be given to where the greater fruit will probably be reaped through the means which the Society uses. This case would arise, for example, where one*

sees the door more widely open and a better disposition among the people along with compliancy favorable to their progress. This disposition consists in the people's greater devotion and desire (which can be judged in part by the insistence they show), or in the condition and quality of the persons who are more capable of making progress and of preserving the fruit produced, to the glory of God our Savior.

[c]. In places where our indebtedness is greater, for example, where there is a house or college of the Society or where there are members of it who study and are the recipients of charitable deeds from those people, and when it is granted that the other considerations pertaining to spiritual progress are equal, it would be more fitting to have some laborers there, and for that reason to prefer these places to others, in conformity with perfect charity.

[d]. The more universal the good is, the more it is divine. Therefore preference ought to be given to those persons and places which, through their own improvement, become a cause which can spread the good accomplished to many others who are under their influence or take guidance from them.

[e]. For that reason, the spiritual aid which is given to important and public persons ought to be regarded as more important, since it is a more universal good. This is true whether these persons are laymen such as princes, lords, magistrates, or ministers of justice, or whether they are clerics such as prelates. The same also holds true of the spiritual aid which is given to persons distinguished for learning and authority, because of that reason of its being the more universal good. For that same reason, too, preference ought to be shown to the aid which is given to the great nations such as the Indies, or to important cities, or to universities, which are generally attended by numerous persons who by being aided themselves can become laborers for the help of others.

[f]. Similarly, the Society ought to labor more intensely in those places where the enemy of Christ our Lord has sown cockle [Matt. 13:24-30], and especially where he has spread bad opinion about the Society or stirred up ill will against it so as to impede the fruit which the Society could produce. This is especially to be observed if the place is an important one of which account should be taken, by sending there, if possible, persons such that by their life and learning they may undo the evil opinion founded on false reports.

[623, a] — E. For better success in the choice of undertakings for which the superior sends his subjects, the same norm should be kept in view, namely, that of considering the greater divine honor and the greater universal good. This consideration can supply completely just reasons for sending a subject to one place rather than to another. To touch upon some motives which can exist in favor of one place or another, we mention these.

[b]. First of all, the members of the Society may occupy themselves in undertakings directed toward benefits for the soul, and also in those directed toward benefits for the body through the practice of mercy and charity. Similarly, they may help some persons in matters pertaining to their greater perfection, or to their lesser perfection; and finally, in regard to things which are of themselves of more good, or of less good. In all these cases, if both things cannot be done simultaneously and the other considerations are equal, the spiritual goods ought to be preferred to the bodily, the matters of greater perfection to those of less, and the things more good to those less good.

[c]. Likewise, when there are some things in the service of God our Lord which are more urgent, and others which are less pressing and can better suffer postponement of the remedy, even though they are of equal importance, the first ought to be preferred to the second.

[d]. *Similarly too, when there are some things which are especially incumbent upon the Society or it is seen that there are no others to attend to them, and other things in regard to which others do have care and a method of providing for them, in choosing missions there is reason to prefer the first to the second.*

[e]. *Likewise also, among the pious works of equal importance, urgency, and need, when some are safer for the one who cares for them and others are more dangerous; and when some are easier and more quickly dispatched and others are more difficult and finished only in a longer time, the first should be similarly preferred over the second.*

[f]. *When everything mentioned above is equal and when there are some occupations which are of more universal good and extend to the aid of more of our fellowmen, such as preaching or lecturing, and others which are concerned more with individuals, such as hearing confessions or giving Exercises; and when further it is impossible to accomplish both sets of occupations simultaneously preference should be given to the first set, unless there should be some circumstances through which it would be judged that to take up the second set would be more expedient.*

[g]. *Similarly too, when there are some spiritual works which continue longer and are of more lasting value, such as certain pious foundations for the aid of our fellowmen, and other works less durable which give help on a few occasions and only for a short while, then it is certain that the first ought to be preferred to the second. Hence it is also certain that the superior of the Society ought to employ his subjects more in the first type rather than in the second, since that is a greater service to God and a greater good for our fellowmen.*

[624, a] — *F. Although it is the supreme providence and direction of the Holy Spirit that must efficaciously guide us to bring deliberations to a right conclusion in everything, and in sending us to each place those who are more suitable and who will fit in better with the men and work to which they are sent, still this can be said in general. First, that for a matter of greater importance and one in which more depends on avoidance of error, as far as this depends on the part of the one who with God's grace must provide, subjects ought to be sent who are more select and in whom greater confidence is had.*

[b]. *In matters which involve greater bodily labors, persons more strong and healthy.*

[c]. *In matters which contain greater spiritual dangers, persons more approved in virtue and more reliable.*

[d]. *To go to discreet persons who hold posts of spiritual or temporal government, those members seem most suitable who excel in discretion and grace of conversation and (while not lacking interior qualities), have a pleasing appearance which increases their prestige. For their counsel can be highly important.*

[e]. *To treat with cultivated persons of talent and learning, those are more suitable who likewise have a special gift of skill and learning. For these persons can be more successful in lectures and conversations.*

[f]. *For the ordinary people, those will generally be most apt who have talent for preaching, hearing confessions, and the like.*

[g]. *The number and combination of such laborers who are to be sent should also receive consideration. First of all, it would be wise when possible that one member should not be sent alone. At least two should be sent, that thus they may be more helpful to one another in spiritual and bodily matters and also, by distributing among themselves the labors in the service of their neighbor, be more profitable to those to whom they are sent.*

[h]. *And if two set out, it seems that with a preacher or lecturer there could well go another who in confessions and spiritual exercises could gather in the harvest which the speaker prepares for him, and who could aid the speaker by conversations and the other means used in dealing with our fellowmen.*

[i]. *Likewise, when one less experienced in the Society's manner of proceeding and of dealing with the neighbor is sent, it seems that he ought to be accompanied by another who has more experience in that procedure, whom he can imitate, with whom he can confer, and from whom he can take counsel in the perplexing matters which he encounters.*

[j]. *With one very ardent and daring it seems that there could well go another more circumspect and cautious. Procedure similar to this, too, could be used in regard to other combinations, in such wise that the diversity may, when united by the bond of charity, be helpful to both of them and may not engender contradiction or discord, either among them or with their fellowmen.*

[k]. *To send more than two when the importance of the work intended in the service of God our Lord is greater and requires a larger number, and when the Society can provide more laborers without prejudice to other things conducive to greater divine glory and universal good, is something which the superior will have authority to do, accordingly as the unction of the Holy Spirit inspires him [1 John 2:20, 27] or as he judges in the sight of His Divine Majesty to be better and more expedient.*

[625] — G. *In regard to the manner in which he is to send them (after the proper instruction), the superior should deliberate whether he will send them in the manner of the poor, so that they would go on foot and without money, or with better facilities; whether with letters to be helpful toward winning acceptance and benevolence at their destination; and whether these letters should be addressed to individuals, or the city, or its head. In regard to all the details, the superior will consider the greater edification of the neighbor and the service of God our Lord and then decide what should be done.*

[626] — H. *When no limitation has been set by the sovereign pontiff as regards the time for which some laborers are sent to one place and others to another, it seems that the length of their stay ought to be regulated by the following considerations. Thought should be given to the nature of the spiritual affairs being dealt with, to the greater or less importance the men themselves have as viewed against the need and the fruit which is being reaped or expected. Then, too, attention must be given to the opportunities available in other places, to the obligation there is to take up these works, and to the resources which the Society possesses to provide for these other undertakings. One should also weigh the accidents which can intervene to shorten or prolong the time. Finally, one should attend to the first characteristic of our Institute. Since this is to travel through some regions and others, remaining for a shorter or longer time in proportion to the fruit which is seen, it will be necessary to judge whether it is expedient to give more time or less to certain missions or to others. That this may be perceived, it is important that those who are sent should keep the superior informed by frequent reports about the fruit which is reaped.*

When it is necessary to change someone, the superior should remember that in recalling him he should, as far as possible, use such means that those from among whom he is taken will retain all their benevolence rather than suffer a certain disedification, being persuaded that in everything the honor and glory of God and the universal good are being sought.

[627] — *I. For someone to propose the motions or thoughts which occur to him contrary to an order received, meanwhile submitting his entire judgment and will to the judgment and will of his superior who is in the place of Christ, is not against this prescription.*

[628] — *K. By this it is clearly forbidden that any member should influence some prince, or community, or person of authority to write a request to the superior for some member of the Society or to ask this of him by word of mouth, unless the member has first communicated the matter to the superior and understood this procedure to be his will.*

[629] — *2. No matter where the superior sends anyone, he will give him complete instructions, ordinarily in writing [L], about the manner of proceeding, and the means which he desires to be used for the end sought. Moreover, by maintaining frequent communication through letters and by being informed, as far as possible, about the entire outcome, from the place where he resides he will provide (accordingly as persons and affairs require) advice and all other aids he can [M] that God our Lord may be better served and the common good promoted by the members of the Society. All this should be done with a care proportionately greater according to the nature of the work, whether important or difficult, and of the character of the persons sent, and insofar as they do or do not need advice and instruction [N].*

[630] — *L. The word "ordinarily" is used because sometimes the person sent is so instructed and sagacious that this writing is not necessary. But in a word, whenever these instructions are necessary, they should be given.*

[631] — *M. Such aids would be prayer and Masses applied especially in the beginnings of the undertakings or when greater need of such succor is observed because the matters are important or the occurring difficulties great. Thus in this matter, as in other helps such as letters patent or bulls, and the like which may be necessary, the superior will provide what reason and charity require.*

[632] — *N. This counsel and instruction can be useful not only in regard to the business but also in regard to the persons, in accordance with what is necessary to encourage or restrain each one. This should also be applied to everything else.*

Chapter 3

A member's free movement from one place to another

[633] — *1. It is the part of those who live under obedience to the Society not to scheme, directly or indirectly, to be sent here or there, either by His Holiness or by their own superior in the name of Christ our Lord. Nevertheless the one who is sent to an extensive region such as the Indies or other provinces and for whom no particular district is marked out, may remain in one place for a longer or shorter period. Or, after considering the reasons on one side and the other,*

while praying and keeping his will indifferent, he may travel about wherever he judges this to be more expedient for the glory of God our Lord.

From this it is clear that, without swerving from that foremost and supreme order of His Holiness, in missions of this type the superior will have much greater power to direct a member to one place rather than another, as he judges in the Lord to be expedient.

[634] — 2. Wherever anyone is stationed, if he is not limited to the use of some means such as lecturing or preaching, he may use the means which he judges more suitable among those which the Society employs. They have been mentioned in Part IV [402-414] and will be mentioned again in the following chapter [A]. Similarly, he will avoid what those passages disapprove, for greater service to God.

[635] — A. *However, it will always be safer for him to confer with his nearest superior about the means to be used.*

Chapter 4

Ways in which the houses and colleges can help their fellowmen

[636] — 1. Since the Society endeavors to aid its fellowmen not merely by traveling through diverse regions but also by residing continually in some places, for example, in the houses and colleges, it is important to have learned the ways in which souls can be helped in those places, in order to use that selection of these ways which is possible for the glory of God our Lord.

[637] — 2. The first way that comes to mind is the good example of a thoroughly upright life and of Christian virtue, through the effort to edify by good deeds no less but rather more than by words those with whom one deals.

[638] — 3. Likewise, the neighbor is aided by desires in the presence of God our Lord and by prayers for all the Church, especially for those persons in it who are of greater importance for the common good [A]. They should also pray for friends and benefactors, living and dead, whether they request these prayers or not. Similarly, let them pray for those for whose special benefit they and the other members of the Society are working in diverse places among believers or unbelievers, that God may dispose them all to receive His grace through the feeble instruments of this least Society.

[639] — A. *Examples of such persons are the ecclesiastical princes, the secular princes, and other persons who have great power to promote or impede the good of souls and the divine service.*

[640] — 4. Furthermore, aid can be given by Masses and other divine services which, whether they are said at the request of individuals or merely for the devotion of the celebrant, are to be celebrated without accepting any alms [B]. In regard to the Masses, beyond those said for the

founders, one or two or more Masses (according to the number of priests and their convenience) should be ordered each week for the benefactors living and dead. Thus God is begged to accept this Holy Sacrifice for them and through His infinite and sovereign liberality to requite with eternal recompense that liberality which they have shown to the Society because of their love and reverence for Him.

[641] — *B. As was explained in Part VI [565, 566].*

[642] — 5. Further still, the neighbor can be aided through the administration of the sacraments, especially the hearing of confessions (with some priests being assigned by the superior for this service [C] and through administering Holy Communion, apart from the Communion of Easter time received in the communicant's parish church [D]).

[643] — *C. As spiritual needs occur the superior will have the duty of considering whether others too, in addition to those who were assigned as ordinary confessors, ought to attend to the administration of these sacraments, and of ordering what is proper.*

[644] — *D. Easter time is understood to mean the eight days before and after the feast. However, during this time it is permissible to admit to Communion those who have permission, or pilgrims and the others whom the law excepts, and also those who have fulfilled their duty in their own parish and desire to communicate one or more times in our churches during these fifteen days.*

[645] — 6. In the church the word of God should be proposed to the people unremittingly by means of sermons, letters, and the teaching of Christian doctrine, by those whom the superior approves and designates for this work, and at the times and in the manner which he judges to be most conducive to greater divine glory and edification of souls [E].

[646] — *E. Since it could happen in some places that on some occasion it is not expedient to employ these means or some part of them, this constitution does not oblige except when the superior thinks that these means should not be used. However, it shows the Society's intention in the places where it will have a domicile, namely, that use should be made of all three of these means of proposing God's word, or two of them, or that one which seems more suitable.*

[647] — 7. The same procedure described above may also be followed outside the Society's church, in other churches, squares, or places of the region, when the one in charge judges it expedient for God's greater glory.

[648] — 8. Likewise, they will endeavor to be profitable to individuals by spiritual conversations, by counseling and exhorting to good works, and by conducting Spiritual Exercises

[649] — *F. The Spiritual Exercises should not be given in their entirety except to a few persons, namely, those of such a character that from their progress notable fruit is expected for the glory of God. But the exercises of the first week can be made available to large numbers; and some examinations of conscience and methods of prayer (especially the first of those which are touched on in the Exercises) can also be given far more widely; for anyone who has good will seems to be capable of these exercises.*

[650] — 9. The members will also occupy themselves in corporal works of mercy to the extent that the more important spiritual activities permit and their own energies allow. For example, they can help the sick, especially those in hospitals, by visiting them and by sending others to serve them. They can reconcile the disaffected and do what they can for the poor and for prisoners in the jails, both by their personal work and by getting others to do it [G]. How much of all this it is expedient to do will be regulated by the discretion of the superior, who will always in view the greater service of God and the universal good.

[651] — *G. However, it is not expedient that the Society, or its houses or colleges, should become mingled with some other congregation, or that such a group should hold its meetings within the Society for some purpose other than that which is proper for these same houses or colleges in the service of God our Lord.*

[652] — 10. That part of what was stated about the houses can also be done in the colleges and their churches should be carried out, according to the opportunity which exists and the superior's decision, as has been mentioned.

[653] — 11. One who has talent to write books useful for the common good and who has written them ought not to publish any writing unless the superior general sees it first, and has it read and examined. The purpose is that if it is judged to be something which will edify, it may be published, and otherwise not.

[654] — 12. What pertains to the offices of a house and other things more particular will be seen in the rules of the house, without our stating more here about the missions or distribution of the Society's members in the vineyard of Christ our Lord.

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CURRICULUM VITAE

Michael Joseph Doiron, S.J. was born in Saint John, New Brunswick, on 29 December 1953. He obtained his early education in the local Catholic schools. After three years at St. Thomas University in Fredericton, N. B., he entered the Society of Jesus in 1974.

Following two years of novitiate in Guelph, he attended Gonzaga University, and St. Michael's Pontifical Institute in Spokane, Washington, where he obtained a B. Crim. Just., an MA in philosophy and a PhL. He taught for two years at Loyola in Montreal, from 1978 to 1980. He began his theological studies at Regis College in Toronto in 1980. After a pastoral placement in Jamaica in 1981, he worked at St. Andrew's Parish in Thunder Bay from 1982 to 1983. He then returned to Toronto where he obtained the M.Div. and STB, in 1985, and an STM in 1986.

For a year and a half he worked in Canada and Mexico for The Jesuit Refugee Services out of the Jesuit Center for Social Faith and Justice. He was ordained to the priesthood in 1986.

Following ordination he went to St. Ignatius Parish in Winnipeg for three years. He began studies in canon law in 1990, and obtained the Masters in Canon Law and the JCL in 1992. From 1991 to 1995 he was the superior of the Jesuit Community of Ottawa, during which time he was active on several committees for the Canadian Jesuits.