

**FORMATION HANDBOOK
THE SECULAR ORDER OF DISCALCED CARMELITES**

**The Specific Guidelines for Formation in the United States
and
The Responsibilities of Councils, Formators, Candidates, Groups, and Communities**



“...The primary role of the person responsible for formation is to accompany those in formation, to help them put into practice what they learn through the process of formation. The information they are given through reading and classes is meant to be a help to the person’s spiritual growth” (Ratio 7).

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Foreword

“And I brought you into the land of Carmel” (Jer 2:7).

The present formation program is intended for all members of the Secular Order of the Discalced Carmelites in the United States. It is the result of a careful collaboration between OCDS members from the provinces of California-Arizona, Oklahoma and Washington who make up this “Task Force,” a commission that was created for its development. The structure and topics of the program are the fruit of many hours of hard work, research, composition, consultation, collaboration, evaluation, discernment, writing and revision.

The different modules of the program accompany Secular Carmelites in all stages of formation and guide them progressively to a better knowledge and understanding of their vocation as lay people living out the Carmelite charism in the many environments in which they find themselves.

Formation is an essential part in the life of the secular members of the Discalced Carmelite Order. According to the *Ratio Institutionis* of the Secular Order, it is essential that formation programs include the areas of human, Christian and Carmelite formation (Cfr. 13-15). These areas prepare OCDS members to “live the charism and spirituality of Carmel in its following of Christ, and in service to its mission” (OCDS Const. 32).

The Discalced Carmelite Order promotes an integral formation that helps people to harmoniously integrate the different dimensions of their being. Human formation is the base of all formation. Saint Teresa of Avila says that no matter where we are in our spiritual life, self-knowledge is essential and should never be neglected (Cfr. *Life* 13,15). A good human formation helps people to know themselves and others better as they develop the capacity to be more aware of the dynamics that play an important role in their relationships with themselves, others, God, and their environment.

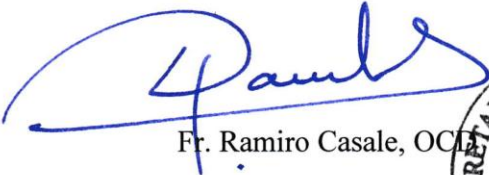
Christian formation is “the solid basis of Carmelite and spiritual formation” (OCDS Const. 33). The catechism and the official documents of the Catholic Church are a great resource to acquire the necessary knowledge about the faith and how to put it into practice. It is important that Secular Carmelites learn the teachings of the Catholic Church so that they may hold fast to the truths that inform and guide the spiritual life.


Formation Handbook for the OCDS

Carmelite formation confirms the identity of those called to be Secular Carmelites in the Discalced Carmelite Order (*Cfr. Ratio Institutionis* 15). The history of the Order, its spirituality and tradition, and the life and teaching of its saints are a continual source of inspiration and knowledge, especially those of St. Teresa of Avila and St. John of the Cross (*Cfr. OCDS Const.* 7-8).

May this formation program help all Secular Carmelites in the United States to prepare themselves to become witnesses of the experience of God in the world, to “live in allegiance with Jesus Christ” (*Rule of St. Albert* 2), and to grow in their friendship and communion with Him (*Cfr. Life* 8,5) as they deepen their knowledge and cherish the vocation they have received.

From Rome, January 1, 2023, Solemnity of Holy Mary, Mother of God.


Fr. Ramiro Casale, OCD
General Delegate of the Secular Order
of the Discalced Carmelites



Introduction

The reform of the Carmelite Order initiated by Our Holy Mother St. Teresa and her collaborator Our Holy Father St. John of the Cross is a living expression of the Carmelite charism in its original form. The friars, nuns and seculars of Carmel complement one another and bring fullness and dynamism to the Carmelite charism of prayer.

The primary orientation of this handbook is towards the formators and Council members of the Secular Order of Discalced Carmelites. Carmelite Seculars come from all walks of life — men and women; young and old; married and single. Each one hears the Word of God and responds to God's call to meditate on the Lord's law day and night (see Rule of St Albert 10).

Ratio 69. A Secular Carmelite is:

- a practicing member of the Catholic Church who,
- under the protection of Our Lady of Mount Carmel,
- and inspired by Saint Teresa of Jesus and Saint John of the Cross,
- makes a commitment to the Order
- to seek the face of God in prayer and service
- for the good of the Church and the needs of the world.

Realizing the importance of nurturing strong and mature communities of Carmelite Seculars, a proposal was made by the OCDS Generalate (Fr. Cannistrà, General Superior and Fr. Debastiani, General Delegate to the OCDS) to develop a single formation program for all Carmelite Seculars in the USA. A task force consisting of two members from each province was created in 2017, resulting in one cohesive formation program from Aspirancy to the Definitive Promise.

Recognizing the value of a program specific to human formation, additional facts and guidelines were added to the OCDS Program of Formation. The result is this handbook: *Formation Handbook, the Secular Order of Discalced Carmelites*. This handbook was developed to convey the essential elements of the OCDS Program of Formation and to assist the Councils and formators in understanding and appreciating the transformative process of human formation. Its content is based on the Christian anthropology of the human person who is “created in His own image and likeness.” To be human, at the most profound level, is to discover the ultimate purpose and value of inner transformation.

The essence of formation and human participation are adequately explained under each subtitle of the handbook. Consequently, all levels of formation (Human, Christian and Carmelite) are interconnected and enhance the transformative process of the candidates.

The communal life of study, prayer, and fellowship allows the Carmelite Seculars to “cherish their vocation and give thanks ‘always and everywhere’ for the gift that has been given them through the providence of God for their own salvation and the good of the Church” (Ratio 90). “The [Carmelite] Secular’s life is more Church-centered. As the life of prayer grows it produces more fruit in the person’s personal life (growth in virtue) and in the person’s ecclesial life (apostolate)” (Ratio 89).

“Contemplative prayer, for Saint Teresa, is at the heart of the Church and is essentially apostolic” (Ratio 91). Hence, the handbook is designed to appreciate the program of formation as a personal and communal journey of faith for the good of the Church and mankind.

“...when the active works rise from this interior root, they become lovely and very fragrant flowers. For they proceed from this tree of God's love and done for Him alone, without any self-interest. The fragrance from these flowers spreads to the benefit of many. It is a fragrance that lasts, not passing quickly, but having great effect.”

(St. Teresa of Avila, *Meditations on the Song of Songs*, 7:3)

The Periods of Formation

There are three periods of initial formation. (See Const. 36, the respective Provincial Statutes, and the OCDS Syllabus.) These are:

- Aspirancy — 12 sessions (1 year)
- Formation I (preparation for the First Promise) — 24 sessions (2 years)
- Formation II (preparation for the Definitive Promise) — 36 sessions (3 years)

Aspirancy is an introduction to the community and the style of life proper to Carmelite Seculars. This period is one year with 12 sessions.

Formation I prepares the candidate for the First Promise. This period is divided into two one-year cycles, Years A and B, with 12 sessions each (see the OCDS syllabus).

Formation II prepares the candidate for the Definitive Promise, which is a life-long commitment. This period is divided into three one-year cycles, Years A, B, and C, with 12 sessions each (see the OCDS Syllabus).

Note: If a community meeting schedule does not accommodate having 12 sessions in 12 months, additional formation sessions may be added outside the regular meetings or two sessions may be combined, at the discretion of the local Council.

Ongoing Formation: Formation does not end with the profession of the Definitive Promise. The Promise commits one to a life-long pursuit of perfection. Ongoing formation ideally goes ever deeper into the mystery of union with God, growth in the virtues, and a genuine striving for holiness in imitation of Jesus Christ.

Note: Ongoing and community formation are addressed in the OCDS Constitutions 18, 24c and 34, and the Ratio, nos. 87 and 93.

Concerning vows in the Secular Order: “With the consent of the Council of the community and the permission of the Provincial, a member of the Secular Order may make vows of obedience and chastity in the presence of the community. These vows are strictly personal and do not create a separate category of membership. ... Those who make vows in the Secular Order continue to be lay persons in all juridical effects” (Const. 39).

The Principles and Purpose of Formation

It is important to keep in mind the fundamental principles that guide the process of formation and the philosophy behind the program of formation for the members of the Secular Order of Discalced Carmelites. There is — and there must always be — a general direction that guides the formation of the OCDS. The following are the basic components of these guiding principles:

- “Number 32 of the Constitutions states that the purpose of formation is ‘to prepare the person to live the spirituality of Carmel.’ This sentence of the Constitutions gives a very important emphasis to the purpose of formation, indicating those elements that are not the priorities in the program of formation. The purpose of the formation program is not to produce experts in Carmelite spirituality, nor to obtain a university degree in spirituality or spiritual theology” (Ratio 4).
- “The purpose is to ‘prepare the person.’ The stress on the person who is to be prepared helps the formation community understand that the process must be directed to the individual in a concrete way. The people who come to the Secular Order of Carmel are, with few exceptions, people who have many commitments, especially with families and with work. The program of formation must be flexible enough to adapt to the circumstances of each person who is to become a member” (Ratio 5).
- “With sincere interest in the teachings of the Church and the spirituality of our Carmelite Saints, Secular Carmelites seek to be men and women who are mature in the practice of their faith, hope and love, and in their devotion to the Virgin Mary. They commit themselves to deepening their Christian, ecclesial and Carmelite life. Christian formation is the solid basis of Carmelite and spiritual formation. Through the Catechism of the Catholic Church and Church documents, Secular Carmelites receive the necessary theological foundation” (Const. 33).
- “Carmelite identity is confirmed by formation in the Scriptures and lectio divina, in the importance of the liturgy of the Church, especially the Eucharist and the Liturgy of the Hours, and in the spirituality of Carmel, its history, the works of the Order’s saints, and formation in prayer and meditation” (Const. 35).
- “... With a progression suitable to the various stages, the candidate should get a clearer idea of how important, indeed necessary, our charism is for [one’s] personal life...” (Ratio 23).
- “...The primary role of the person responsible for formation ... is to accompany those in formation, to help them put into practice what they learn through the process of formation. The information they are given through reading and classes is meant to be a help to the person’s spiritual growth” (Ratio 7).
- “... The spirituality of the Discalced Carmelites has a very sound intellectual foundation. There is a doctrine involved here. Any person who wants to be a Discalced Carmelite must be a person with an interest in learning from the teachers of Carmel. There are three [Carmelite] Doctors of the universal Church, Teresa, John of the Cross, and Therese” (Ratio 78).
- “There is an intellectual aspect to the formation of a Discalced Carmelite. There is a doctrinal basis to the spirituality and identity of one who is called to the Order. As the friars and nuns, the seculars too ought to have a good intellectual and doctrinal

formation since as members of the Order they represent and give witness to a mature and profound spirituality” (Ratio 79).

- “Both initial and ongoing formation in the teachings of Teresa and John of the Cross, help to develop in the Carmelite Secular a human, Christian and spiritual maturity for service to the Church...” (Ratio 54).

Ratio 13. Human Formation

develops our:

- ability for interpersonal dialogue, mutual respect and tolerance
- readiness to the possibility of being corrected and to correct others with serenity
- capacity to persevere in our commitments

Ratio 14. Christian Formation

enhances our:

- capability to receive the necessary theological foundation by means of the *Catechism of the Catholic Church* and Church Documents
- appreciation of our baptismal consecration
- zeal for conversion, Christian commitment and holiness of life
- fervor to live the demands of following Jesus by taking part in His saving mission in unfolding our prophetic, kingly and priestly calling.

Ratio 15. Carmelite Formation

confirms our Carmelite identity in the:

- study and spiritual reading of the Scriptures and in the practice of *Lectio Divina*
- importance of the liturgy of the Church, especially the Eucharist and the *Liturgy of the Hours*
- spirituality of Carmel, its history, the writings of the Order’s Saints
- formation in prayer and meditation
- formation for the apostolate based on the teaching of the Church and on understanding our role as Seculars in the apostolate of the Order

Further thoughts:

The heart of the vocation is the commitment to strive to follow Christ in His poverty, chastity, obedience and the beatitudes (the Promise), the opening of self to be transformed in Christ, perseverance in seeking God in prayer for the good of the Church and the world, a growing desire to serve, and commitment to one’s community and the Order.

The readings and discussions are part of the means of formation. Though important, they are not the whole picture. Candidates are also formed by the example, conversation, and companionship of the other members of the community. Their deeper transformation is from the action of the Holy Spirit and depends very much on their openness to the grace of God.

“Always remember that we are not assembling Carmelites. We are forming Carmelites. I think it becomes apparent when a Formation Director says to the

Council, 'this person, I think, really has it.' ... It works out with practice. The criterion is not set, because it's not objective, in the terms that it is not a test that you can pass or fail on. It is more under the influence of the Holy Spirit today"

(Fr. Aloysius Deeney, *Welcome*, pg. 107).

The Formation Team

The formation team is made up of the Formation Director and the formators, who are appointed by the Local Council, and are primarily responsible for conducting formation sessions and accompanying the candidates in formation.

"The Community Council will take special care to select suitable seculars for the formation team, people of prayer and culture, open-minded and anxious to share their Carmelite experience with the candidates. Provided the formators all agree in their objectives and methods, the better qualified and even diverse they are, the more successful will be the education of the candidates. ..." (Ratio 29).

The Formation Director

"The Director of Formation ... has the responsibility of preparing the candidates for first and definitive promises" (Const. 53).

"The principal task of the Director is to accompany, following closely the progress of each candidate. Next to the candidate, the director is the main contributor to the formation process. The director is in a privileged position, for which grace will not be lacking. For this reason, the director will consider himself or herself a humble disciple and a servant of the one Director, Jesus Christ. At the same time, the director is aware that he or she is fulfilling an important role of mediation between the candidate on the one hand and the Church and the Order on the other" (Ratio 34).

Before the new formation cycle starts, the Council decides together which members would be the best choice for formators. The Formation Director also shares with the rest of the Council a list of candidates by group and the materials they will need (See Appendix A, *Keeping track of individuals — candidate files*).

The Formators

The formators cooperate as a team with the Formation Director to carry out the directions given by the Council. Formators cannot offer true and effective formation to others if they do not take a personal responsibility for formation. The better the formators themselves are formed, the more they will feel the need to fully prepare themselves for forming others.

First, the formator must be faithful to the Church and the Order. A good formator will guide the candidate along the path to holiness according to the spiritual traditions of the Discalced Carmelite Order. Hence, to be effective, each formator must have a sound knowledge of the syllabus, theme, and the discussion points of the formation level that is entrusted to him or her. As St. Teresa pointed out, it is better to have a learned director (formator) than a holy one. A

formator who understands our spirituality as Discalced Carmelites can better accompany the candidates than someone who is holy but does not grasp our charism and may not know of any spirituality beyond his/her own personal experience (see *Life*, ch. 5:3). “Learning is a great help for shedding light upon every matter” (*The Way of Perfection*, 5:2).

Formation in Carmel looks to the soul and spirit, not just the intellect. Formation in Carmel concerns the human, Christian, and Carmelite development of the entire person. Formators are responsible for helping create the space in which each person feels comfortable sharing what they learned from the materials. Formators also ensure that necessary concepts, values, and attitudes are grasped and put into practice. They assist the group members in discussion, in helping them understand what the vocation entails, and in encouraging them in developing the qualities needed to live it. The formators’ task is to help the candidates to integrate the wisdom of Carmel into daily life.

While the formators are responsible for the candidates’ formation, they are not authorities or owners, but servants. “You have but one Teacher and that is Christ” (Matthew 23:10). They serve as part of the formation team, working in collaboration with the Formation Director, the Council, and especially the Holy Spirit.

Additionally, formators are expected to foster openness, approachability, readiness for dialogue and patience, and should always have a warm and welcoming attitude.

Training

Besides the workshops offered at the provincial level, local Councils need to have training sessions for their community’s formators before the formation cycle begins. These can be as formal or informal as the Council sees fit. At a minimum, there should be a thorough review of this handbook and the syllabus and goals for the year.

First-time formators might be coached by an experienced co-formator for the first few sessions.

It is usual for the Formation Director and formators to meet periodically and talk about how things are going with the sessions in general and the individual candidates in particular.

Note to the local Council: It is important that the Council makes provision for the formators to receive their own ongoing formation. This is especially needed in smaller communities, where an individual member may be asked to serve as a formator several years in a row.

Accompaniment

“...The primary role of the person responsible for formation... is to accompany those in formation, to help them put into practice what they learn through the process of formation. The information they are given through reading and classes is meant to be a help to the person’s spiritual growth” (Ratio 7).

Formators need to have an attitude of companionship with equals, rather than “the teacher in charge.” While good formation depends on good information, it is wrong to mistake mastering the information for formation itself. Ideally, the formators and candidates develop a relationship that helps each other to exchange valuable and necessary feedback. Formators are

not spiritual directors and should not invade the candidates' privacy. (see *Welcome*, pgs. 104-108).

The writings of our Carmelite saints support the importance of spiritual accompaniment and its positive impact in their lives. When St. Teresa was sent to a convent school by her father, the good companionship of a nun played a vital role in the awakening of good desires in her. "... the holy conversation of this nun...this good company began to help me to turn my mind to the desire for eternal things ... and ... freedom from the antagonism that I felt strongly within myself toward becoming a nun" (*Life* 3:1). The rest is history now.

Charism of the Order — Prayer

First and foremost, the Program of Formation supports the Discalced Carmelite **charism of prayer**. "With a progression suitable to the various stages, the candidate should get a clearer idea of how important, indeed necessary, our **charism** is for [one's] personal life..." (Ratio 23, emphasis added; cf. Ratio 20).

"Charism" refers to the distinct spirit that animates a religious order and gives it a particular character and identity. The OCDS formation syllabus is designed to accommodate and explain the Order's charism based largely on the writing of the three Discalced Carmelite Doctors of the Church, namely, St. Teresa, St. John of the Cross, and St. Therese. Primarily, it is the responsibility of the formators to stress the importance of the Discalced Carmelite charism of prayer at each level of formation.

Candidates in formation should have a basic understanding of the following key elements of our charism to discern their vocation in Carmel:

- a. Carmelite prayer is to be understood as being present to God, as relationship with God, rather than as an exercise to be performed. Interior prayer involves no rigorously prescribed method and has little to do with techniques. The primary focus is on the search for God in silence and solitude, our longing for union with Him. "For mental prayer in my opinion is nothing else than an intimate sharing between friends; it means taking time frequently to be alone with Him who we know loves us" (*Life*, 8.5).
- b. A grasp of the history of our charism is needed for a genuine living of it. The Discalced Carmelite charism of prayer develops from Elijah to Our Lady, from the hermits on Mount Carmel to the Rule of St. Albert, from St. Teresa's reform to St. Therese's Little Way, from our Saints to us with our modern-day contributions and challenges. "Let us keep before us our true founders, those holy fathers [the hermits on Mount Carmel] from whom we descend, for we know that by means of that path of poverty and humility they now enjoy God" (*Foundations*, 14.4).

Note: when examining our charism, the focus should be on the origin and development *of the charism* as opposed to the history of the Order.

- c. The Carmelite charism of prayer has an apostolic dimension and overflows with missionary fervor based on a fervent interior life. While most orders are founded for an apostolic mission, the Carmelite Order is not restricted to one such apostolate. Instead, the apostolic activities result from our intimate relationship with God, and love

permeates all our activities and services. “Taking into account the origins of Carmel and the Teresian charism, [one of] the fundamental elements of the vocation of Teresian Secular Carmelites... [is] **‘to seek mysterious union with God’** by way of contemplation and apostolic activity, indissolubly joined together, for service to the Church...” (OCDS Constitutions, Art. 9, emphasis added).

The OCDS Syllabus

The OCDS Syllabus is designed to convey the Gospel message based on the writings of the Carmelite saints, Church documents, and the Catechism of the Catholic Church (see Const. 32-35). It involves the process of transformation within the context of active and passive purification that leads one to the glorious union with God: It is no longer I who live, but it is Christ who lives in me (Gal 2:20). “This will lead to living prayer as an attitude of life, that will ‘always and everywhere recognize God ... seek his will in every event, see Christ in all people whether they be a relative or a stranger, and make correct judgments about the true meaning and value of temporal things both in themselves and in their relation to mankind's final goal.’ Thus, they will achieve a union of contemplation and action in history, integrating faith and life, prayer and action, contemplation and Christian commitment” (Const. 20).

Initial formation involves many important facets of life in Carmel that help candidates to advance in prayer and discernment. One such essential element in formation is the “study” of the OCDS legislative documents, Church documents, and most central, the writings of our Carmelite Doctors of the Church. This “study” is a pondering and internalizing; it is meant to be transformative. The discussions are a mutual accompaniment, each aiding each on their spiritual journey. (See Fr. Deeney’s article on the role of study, below.)

The Study Editions have been assigned because the explanatory notes provide valuable insights and are an important tool for additional information related to the assigned chapters. However, the explanatory notes are not meant to replace the main book written by the saints. Formators and candidates are responsible for attentively reading the actual writings of the saints when preparing for the formation sessions.

The syllabus presented for each formation cycle (12 sessions) states the objectives and lists the essential materials. The formator’s full participation is crucial in presenting the materials, the theme of each session, the assigned chapters, and the brief review of the essential points to discuss.

Using the syllabus

Follow the readings and discussion points month by month. **The “additional reading” is optional for the candidates but is always to be read by the formators.** Explanatory notes are to clarify or emphasize specific ideas. These can be mentioned during the discussion, as they seem helpful.

Use the materials that are assigned. Any supplementary materials need to be approved by the local Council and then may be presented as **optional** enrichment reading.

Preparing for the formation sessions

Formators and candidates are to read the assigned materials (no matter how many times they have already been read in the past). Read the discussion points. **Select several points** for in-depth discussion. Write down thoughts as they occur as an aid to memory.

Leading the sessions

As we begin to share the OCDS syllabus with the candidates in formation, the following basic guidelines will help the formators to have a better presentation of the theme and the overall understanding of each session:

- Begin each session with prayer, invoking the Holy Spirit.
- **Select several points for deeper discussion** rather than try to cover every point during the time allowed. It is appropriate to discuss practical application of the concepts in daily life.
- The questions and discussions should stimulate interest in living out the Gospel values and help the candidates to grow in the spirit of faith, hope and love. “Teach them to observe all that I have commanded you” (Mt 28:20). Avoid questions that have right-wrong or yes-no answers. The goal is to develop a Carmelite way of life, not simply to master the book’s contents. (See Fr Deeney’s *The Role of Study* article below.)
- It is important that the formators pay attention to the candidates’ questions and offer clarifications to help them better understand and internalize the saint’s teachings.
- Be sure everyone has a chance to speak. This may mean gently restraining the more talkative candidates. It will certainly mean asking the quieter candidates for their thoughts.
- Make the effort to stay on the topic. While the discussions should be a free give-and-take among the participants and there is almost always personal sharing, try to keep it relevant to the matter at hand.
- Be respectful of differing points of view.

Communicating with the Council

Sharing information with the Council is not a breach of confidentiality, but part of the formator’s responsibility as a member of the formation team.

If a formator notices issues with a candidate, such as not reading the materials, not respecting the other members, not participating in the discussion, not letting others talk (dominating the discussion, interrupting, or talking over others), not being open to being formed, etc., it is the formator’s responsibility to consult with the Formation Director. The Formation Director can assist the formator to help the candidate. The Formation Director brings it to the rest of the Council, as needed.

Councils normally talk with the formators before the candidates’ periodic reviews and discernments for Clothing and Promises. Be ready to talk with the Council about each

candidate's participation, progress, and general behavior in the group, and how the sessions are going overall. Be open to Council recommendations and requests.

"All Christian formation consists of entering more deeply into the kerygma [Kerygma refers primarily to the preaching of the Apostles as recorded in the New Testament]. ... It is the message capable of responding to the desire for the infinite which abides in every human heart. The centrality of the kerygma calls for stressing those elements which are most needed today: it has to express God's saving love which precedes any moral and religious obligation on our part; it should not impose the truth but appeal to freedom; it should be marked by joy, encouragement, liveliness and a harmonious balance which will not reduce preaching to a few doctrines which are at time more philosophical than evangelical. All this demands on the part of the evangelizer [formator] certain attitudes which foster openness to the message: approachability, readiness for dialogue, patience, a warmth and welcome which is non-judgmental"

(Evangelii Gaudium, 165).

The Role of Study in the Secular Order of Discalced Carmelites

The following is adapted from Fr. Deeney's *Welcome to the Secular Order of Discalced Carmelites*, pg. 78-80:

It is important to clarify some issues regarding the term "study" and the OCDS formation. Most of us have an image associated with the word "study" that comes from our own experience. When we were in primary school, we had to "study" in order to advance from grade to grade each year. "Study" meant memorizing, practicing, testing... "Study" was competitive. Scores were given and prizes awarded to the ones whose "study" produced the best scores. ... So "study" has, for many of us, an image of "get it over with so you can get out of school."

Neither one of those ideas has anything to do with what the word "study" means in the initial or ongoing formation of the members of the Secular Order.

First, study in formation of the OCDS is not reduced to some sort of academic pursuit of knowledge that is easily discernible by testing like a mathematical timetable.

Second, study in formation of the OCDS is not the sole pursuit of one person to conquer a body of knowledge.

Third, study in formation of the OCDS does not have a point at which one says "The End."

A basic definition of what "study in formation of the OCDS" could be, is the process whereby, with the help of others, we attempt to

deepen our understanding of the relationship with God in the light of Catholic and Carmelite doctrine.

Is there a place of academic and intellectual pursuit in the Carmelite communities? Certainly, for those who have the time and the ability to do so. But that is not what all of us need to do in the OCDS program of formation. Academic study is a product, whereas the formation in OCDS is a process. [As understood by Our Holy Mother St. Teresa, it is a transformative process from a worm to butterfly and beyond.]

It is important to note that simply because someone can quote chapter and verse of St. Teresa, St. John of the Cross and St. Therese, does not necessarily mean they have been formed. I have heard the lament: “Our poor holy parents (Teresa and John), so often quoted, but so little followed!”

There are challenges in this type of study as opposed to academic ones. In OCDS formation, there are no tests, gold stars or blue ribbons.

The challenges are:

First, the desire to deepen the understanding of the relationship with God. That can be demanding...in fact, it is a lot easier to memorize Saint Teresa or fill in blanks on a sheet of questions.

The second challenge is that you need others to help you, and you need to help others. Also, not easy.

The third challenge is that it is based on Catholic and Carmelite teachings, and not just what I think about it all.

Some specifics of formation

Required/assigned readings and the essential points in a particular theme in the syllabus are quite sufficient to have meaningful discussions and participation as the candidates progress through formation. Open-ended questions (questions that allow one to give a “free form” answer as opposed to specific questions or fill-in-the-blanks) make for a more fruitful exchange of ideas.

For example, incorporating Fr. Donald Kinney’s three questions in any formation session is an excellent way to invite the candidates to participate in the discussion:

1. What did I read that has something for me to learn?
2. What, if anything, is the Holy Spirit asking me to share?
3. What have I read that I can incorporate into my daily Carmelite life?

Likewise, Fr. Bonaventure Sauer’s three questions would be good discussion points:

4. What is the author trying to get across?

5. How does it apply to the Seculars?
6. What did I find especially helpful?

Different candidates will come away with different takes or different interpretations that may apply to their daily life — and that's good. That's what a formator expects in formation. Some of the candidates may choose to write down their reflections for their own personal use.

It is the formators' responsibility to know each candidate and respect their freedom of spirit. Avoid written assignments to be turned in and reviewed or used by the Council for evaluating a candidate's progress. Our aim is personal transformation, not simply academic study. Please keep in mind that discernment for the Promise is not based on how well a candidate did the "homework" but on their overall progress in embracing Carmelite life, **especially the qualities that make for a harmonious community**. Please see below *The Criteria for Evaluating Candidates*.

It is essential that each Council member spends time with the candidates and gets to know them personally. An individual may not be expressive in writing and yet still have a good understanding of the charism, with a deep prayer life and a sincere love for their community and the Order.

Thus, the formators' responsibility is to follow the syllabus and come prepared for discussion and participation with the candidates. They must take to heart the guidance of our Holy Father St John of the Cross: "...the principal guide is the Holy Spirit, who is never neglectful of souls." As St. Therese pointed out, you, as a formator, are "a little brush that Jesus has chosen in order to paint His own image in the souls..."

Formation is not a mental exercise, but a healthy exchange of concepts within the context of Discalced Carmelite spirituality. The purpose of formation is to capture the essence of Carmel and to grow in the spirit and life of prayer.

At each session, formators have the privilege of "planting the seeds and watering them" (that is to present the materials and engage in meaningful discussion). The rest, leave to God. Always remember, it is "God who gives the growth" (1 Cor 3:7), which should be the motto in OCDS formation. Accordingly, "the information they are given through reading and classes [sessions] is meant to be a help to the person's spiritual growth" (Ratio 7).

The spontaneous responses of the candidates should be the focus of the formation sessions. God's works are not always visible to the naked eye. Hence, it is important for the formators to create a free and open atmosphere with the necessary tools (assigned materials and discussion points) for the candidates to recognize the prompting of the Holy Spirit. "... [formation] should stimulate a desire for this growth, so that each of us can say wholeheartedly: 'It is no longer I who live, but Christ who lives in me' (Gal 2:20)" (Evangelii Gaudium, 160). This realization — the virtue of self-knowledge — is essential to spiritual growth.

We learn from the writings of St. Therese that the Holy Spirit guided her to the life of prayer when reading Abbe Arminjon's conferences on *The End of the Present World and the Mysteries of the Future Life*. Her reaction to the book was precious:

“This reading was one of the greatest graces in my life. ...the impressions I received are too deep to express in human words. All the great truth of religion, the mysteries of eternity, plunged my soul into a state of joy not of this earth, I experienced already what God reserved for those who love Him (not with the eye but with the heart), and seeing the eternal rewards had no proportion to life’s small sacrifices. I wanted love, to love Jesus with a passion...” (*Story of a Soul*, Study Ed. pg. 158).

“It [formation] should not impose the truth but appeal to freedom; it should be marked by joy” (Evangelii Gaudium 165).

Opportunities for formation are not limited to the study sessions at the monthly meetings. Besides the regular formation sessions, candidates participate in the community’s annual retreat, days of reflection, provincial workshops, OCDS Congresses, etc. The candidates’ sense of themselves as committed members of the community and the Order is vital for their overall formation.

As noted previously, the purpose is to “prepare the person.” The Ratio points out that “the people who come to the Secular Order of Carmel are, with few exceptions, people who have many commitments with families and work. As such, the program of formation must be flexible enough to adapt to the circumstances of each person who is to become a member” (Ratio 5).

“Flexibility” does not mean introducing a “watered down” version of the syllabus or cutting down the formation period. It means finding ways to help candidates who may be struggling, or have had to miss meetings, or simply need more time.

Given that so much of formation happens in the context of the monthly meetings, absences should be rare and for a serious reason. For more on this, revisit the OCDS Constitutions 24.c, the Ratio 24-29, and relevant attendance policies. Occasional missed sessions may be “made up” by discussing the readings with the formator outside the regular meeting time (in person or by phone or video call), as the local Council deems appropriate. It is important that every candidate keeps up with what the rest of the group is reading.

“As the friars and nuns, the seculars too ought to have a good intellectual and doctrinal formation since as members of the Order they represent and witness to a mature and profound spirituality” (Ratio 79).

Good formation allows the candidates to dwell in the wisdom proclaimed by St Paul: “There is, to be sure, a certain wisdom which we express among the spiritually mature. It is not a wisdom of this age... No, what we utter is God’s wisdom: a mysterious hidden wisdom. God planned it before all ages for our glory” (1 Cor 2:6-7).

Consequently, while adapting to individual needs where possible, the guiding principles of formation remain the same for all, regardless of the size of a formation group or the personal situation of a candidate.

The Criteria for Evaluating Candidates — Discernment:

The periods of formation give the community the opportunity to make an adequate discernment of candidates in formation (see Ratio 56).

“To discern is to ascertain God’s will for the person, ‘it is to be led by God’” (Ratio 59). “There are three active parties in this discernment: God, the candidate, and those responsible for formation” (Ratio 60).

“Discernment is not limited to one particular moment and does not happen all at once. Special moments are those of transition from one stage of formation to the next” (Ratio 61).

“For discernment to be valid it is important that those involved in the process of formation know the candidate. When the Lord calls people, we are confident that **He will give them sufficient ability to respond to the living of that call**” (Ratio 62, emphasis added).

It is crucial that the Council makes a serious discernment for each individual candidate. Because formators are in a privileged position to know the candidates well, they have the responsibility to assess each candidate and speak frankly with the Council regarding any concerns as they arise. Councils are expected to address issues as soon as they are noticed.

When evaluating a candidate, the important questions are these: Are they getting along well with the other community members? How do they contribute to the wellbeing of the community? Paraphrasing Fr. Deeney:

Candidates ought to have a certain human capacity for conversion. Human capacity, not spiritual conversion. Not aversion from sin. Not practicing virtues heroically, but a **human capacity**. There must be an ability to be part of other people. That is your responsibility as Council members when it comes to your decision on whether a candidate should continue in Carmel. A candidate can be an expert on Carmelite spirituality, on the Catechism of the Catholic Church, on all the documents that have ever been written, and still not be someone who belongs in Carmel.

What are you looking at? Not their intelligence, not their wisdom, not their knowledge, **but their ability to relate to the people in the community**. This is not a private school of spirituality. This is an organization of Christ’s faithful people, part of the Discalced Carmelite Order. It is a community of people. You are looking at the capacity of this person to be part of the Community.

There is a purpose for the formation. It’s to get the person in a position, mentally, emotionally, psychologically, intellectually and spiritually to commit himself or herself to the Community.

(*Welcome to the Secular Order of Discalced Carmelites*, see pg. 101-103, emphasis added).

Hence, the ultimate criteria for evaluating candidates does not depend on their intelligence or love of Carmelite saints and the Blessed Mother. Neither wearing the scapular nor holding a university degree should be the focus. Also, “there are no tests, gold stars or blue ribbons” when it comes to voting for a candidate. **The questions are: “Can this person form community with us? How does this person help the community to live its commitments?”**

In the initial stages of formation, our focus should be on nurturing the soul — that is the body of being a member of the Order. It is that body that receives its energy, its power, its light, its guide from the spirituality of St. Teresa and St. John of the Cross, St. Therese, St. Teresa Benedicta, St. Teresa of the Andes, and St. Elizabeth of the Trinity. That’s the energy, that’s the light, that’s how we know what we are doing correctly, and that’s how we do it as members of our Order (see *Welcome*, pg. 103).

The following paragraphs from the Ratio describe the basic signs of a vocation to Carmel and should be reviewed and discussed before every discernment, from Aspirancy up to Definitive Promise:

The essential qualities of a person suited to the vocation in the Secular Order of Discalced Carmelites:

“A divine call is always a mysterious grace that cannot be reduced to a list of qualities. But there are certain qualities that indicate that a person is essentially suited to the vocation of a Secular Carmelite” (Ratio 63).

Ratio 64. At the human level:

- a stable personality
- common sense
- emotional maturity
- ability to trust and be open
- readiness to cooperate
- realism, tolerance and flexibility
- a certain self-knowledge
- fidelity to principles;

Ratio 65. At the level of Christian life:

- a willingness to cooperate with God, in a spirit of faith
- dedication to prayer
- love of the Scriptures
- commitment to the Church and involvement in the local parish community
- a compassionate and active love;

Ratio 66. At the Level of the Teresian Charism

- a taste for prayer and
- a desire to establish a personal and friendly relationship with God
- a contemplative and active spirit
- a love for the Church
- a desire to familiarize oneself with Carmelite spirituality.

Ratio 68. It would be unrealistic to expect any candidate to possess all these qualities before they enter the Secular Order, or indeed at any of the stages of their formation. **Nevertheless, there should be a predisposition for these qualities and a gradual maturation in them. This maturation in living the Teresian charism is the most genuine sign of a vocation** (emphasis added).

Ratio 67. Some counter indications are:

[These indicate that a person is not suited for a vocation in Carmel. Councils must overcome any reluctance to say “no” when necessary. Reviewing the following will help Councils to discern objectively.]

- symptoms of a lack of psychological equilibrium;
- the presence of family situations which make the living of the Constitutions impossible;
- an incapacity for personal integration into the life of the community;
- overwhelming emotions of anger, anxiety, fear, depression or guilt;
- preconceived ideas of Carmel which impede learning and personal growth; [Are they coming to be *formed* or to *inform*?]
- fundamentalist or apocalyptic notions of the Church;
- membership in organizations with a distinct spiritual path;
- membership in groups based on private revelations.

[Referring to the two last bullets, the person would need to resign from any such group if desiring to pursue a vocation in Carmel.]

The Council and its Responsibilities

The primary responsibility of the Council is the formation of the members of the community. The Council has the authority (Const. 47):

- a. to admit candidates to formation, the Promises, and the Vows;
- b. to reduce, for adequate reasons, the period of formation before temporary [first] Promises.

Note: Councils also have the authority to grant extensions of formation for candidates who are not quite ready for the Promise. This is governed by local Statutes and Provincial policies.

“In the program of formation, as outlined in the Constitutions, it is always the Council that has the right and obligation to discern the progress of the candidates. It is always the Council that has the right to admit the candidates to each stage of the formation process. For this reason, the Council itself must be interested in the process of formation and support the formation director in his or her task” (Ratio. 11).

Every person accepted into a community changes the community's dynamics. If there is any doubt, Some of Fr. Deeney's questions would help the Council during their evaluation of the candidates:

- Why would we accept people as part of our community that we would never want to live with?
- What would this person do to the community?
- How would this person affect the community?

The Formation Director keeps a file of the periodic evaluation reports, attendance records, and notes on any concerns regarding each candidate. Nothing written should be offensive to the candidate's dignity. These records help the Council to evaluate the candidate. These files are handed over to the new Formation Director until the candidate makes the Definitive Promise. Only the Council and their legitimate superiors have access to these files. (See appendix A, *Keeping track of individuals — candidate files.*)

The overall community life of a candidate gives valuable opportunities for the Council to observe and evaluate a candidate in formation:

- regular attendance at community meetings
- participation in the formation sessions
- socializing and engagement within the community
- responsibility for a community job (start with something small)

"The Council retains its responsibility and competence in those matters laid down in the Constitutions, namely, regarding the suitability of candidates and the consent for admission to formation, to first promises, for final promises, and for vows. Special deference will be given to the judgment of the [Formation] Director and his assistants [the formators] because of their position in the work of formation" (Ratio 35).

Over time, the local Council evaluates how well the candidates are progressing by observing their attendance, by their behavior in community life, by listening to their participation in the formation discussions, and by regular "check-ins" to talk informally with them about how things are going (besides those the Formation Director has with the formators and candidates).

Note: The Profession letters of the candidates convey the many aspects of their journey and their desire to enter Carmel. These letters provide further insight for the Council concerning the candidates' vocation. The letters are then returned to the candidates.

The Community

The Council and formators, however, are not the only ones responsible for the success of formation, but the whole community is responsible for the candidate's progression and harmonious life in Carmel. "The Secular Order community ... is the appropriate place for the formation of the candidate seeking admission. The community should give a good example of how to live Secular Carmelite life, even if it does not reach the ideal" (Ratio 28).

The spiritual aid given to the candidate during formation is expressed primarily through prayer and personal witnessing of life in the community. The charism of Carmel is not only transmitted theoretically, but also practiced and lived within a community setting. “The community, the Council, the formator, those who give classes, and the Spiritual Assistant of the community must be willing to help the new members of the community by example and by direction. And the new members themselves must be intellectually and personally **open to the new ways of the spiritual life** they will find in Carmel” (Ratio 10, emphasis added).

Growth in holiness is a journey within the community, side by side with others. Each community is called to create a God-enlightened space in which to experience the hidden presence of the risen Lord. Consequently, human formation involves nurturing and developing a strong, balanced personality.

St. Teresa succinctly reminds that the most important element of community life is the attitude and practice of the virtue of humility: “So, sisters, strive as much as you can, without offence to God, to be affable and understanding in such a way that everyone you talk to will love your conversation and desire your manner of living and acting, and not be frightened and intimidated by virtue” (WP 41:7).

Service in OCDS communities

One of the signs of a genuine vocation is the gradual transition from coming to Carmel to be “fed” to feeling a desire to serve. Adopting the spirit of Carmel — chastity, obedience, poverty, and the Beatitudes, along with humility, charity, and detachment — candidates experience the life of Carmel in a community setting. Healthy communities teach by example how members serve one another, the community, the Order, and the Church.

“[St. Teresa’s] evangelical self-denial, **disposition to service** and perseverance in the practice of the virtues are a daily guide to living the spiritual life” (Const. 7, emphasis added).

“Mary is also an ideal and inspiration for the Secular Carmelite. ... She, Mother and Sister, who goes before us in the pilgrimage of faith and in following the Lord Jesus, keeps us company so that we may imitate her in her life hidden in Christ and **committed to the service of others**” (Const. 30, emphasis added).

“Both initial and ongoing formation in the teachings of Teresa and John of the Cross, help to develop in the Secular Carmelite a human, Christian and spiritual maturity for **service** to the Church. Human formation develops the ability for interpersonal dialogue, mutual respect, tolerance, the possibility of being corrected and correcting with serenity, and **the capacity to persevere in our commitments**” (Const. 34, emphasis added).

“An important aspect of this commitment [to the Order] is a commitment to the community. A person who wishes to be a member of the OCDS must be able to form community, be part of a group that is dedicated to a common goal, show interest in the other members, be supportive in the pursuit of a life of prayer and be able to receive the support of others... In the formation of the community, this social characteristic is one that should develop” (Ratio 85).

We will have stronger communities by instilling in all the candidates the desire to serve, and to help the communities they become a part of. Academic qualifications or longer years of experience are not required to serve in a community. Advanced age is not an impediment to serving. As part of the community, candidates are expected to take on a role of service. This might include liturgy, retreat work, hospitality, visiting the sick, library, etc. This immediate involvement not only deepens their sense of belonging, but helps each member understand how the community operates.

Further, serving on a committee is an opportunity to learn how to work with others in a spirit of cooperation and detachment. Being called on to serve can help candidates discern whether this is the life they want to live. When formation is done well, the candidates themselves usually recognize whether or not Carmel feels like “home” to them. Another benefit is that giving candidates community jobs helps the Council to gauge their attitude toward self-giving, ability to cooperate with others, and follow-through on commitments.

In addition, it is good practice for Councils to delegate to the members anything that does not need to be done by the Council itself. This makes serving on the Council less burdensome and helps the members to develop leadership skills.

Leadership

“You, Brother B., and whoever may succeed you as prior, must always keep in mind and put into practice what our Lord said in the Gospel: Whoever has a mind to become a leader among you must make himself servant to the rest, and whichever of you would be first must become your bondsman” (Rule of St. Albert, 22).

It needs to be made clear that *everyone* must be willing to take a turn serving the community in a leadership role. Some may be more suited than others, but *everyone* needs to be willing to serve on the Council or as a formator if they are asked. These roles are not to give honor and prestige, but to serve and work for others.

Some of Fr. Deeney’s thoughts (below) help us understand the essential elements of leadership:

“I join a community in order to learn it [what God is asking of me]. And I am a member. Before I am ever a leader, I am a member of a community. No one, absolutely no one, in religious life has a vocation to be a leader. We have no hierarchy. Everyone has a vocation to be a member, and certain members are asked at certain times to take on the responsibility of leadership, but no one has the vocation to be president of the community. No one. Everyone has a vocation to be a member of a community. So we approach this membership as the most important part of our spiritual life.”

“The greatest obligation, therefore, on those who have the responsibility of leadership is to respect the differences that exist in the members of the community. I believe that those who are given the

responsibility of leadership in community are called to a deeper humility. Because it's the humility that almost, can be crucifying. They elect you to come up with all the answers and you know you don't have them. They elect you to decide things and you don't know what to do. It is a deeper humility that's required, and the humility demands a deeper cooperation with the members of the council. And the deeper cooperation with the members of the council increases the responsibility of the council to listen to the members of the community."

"We do our best in cooperation, certainly with the council, but we must realize that after we have done our best, we must trust God with the results. So I take these two attitudes, actually it's one basic attitude, to be [to exist] humbly before God, and a member of the community; and when called upon by the community to realize that we're called upon by God to fulfill a responsibility to the community, to fulfill that responsibility, humbly. Not with arrogance! Not giving the impression that I know, and you do not! Because we must be aware that we could be trampling on the Holy Spirit active in the life of another person. But equally as members, we must realize that before God we are charged with the responsibility of cooperating with those who have this burden to be leaders and that this cooperation that we must give speaks about the maturity of our spiritual life."

"... The council is not like the bishop. The bishop has a vocation to be a leader. He therefore receives the grace to be a leader. We have the grace to be members. And out of that membership, we cooperate in leading the community. When we're no longer the leader, we go back to being a member. The bishop never goes back to being a diocesan priest. It's a different vocation. But we can't use that model [for understanding how we function [in the OCDS communities]]."

"... If you're a member of the secular order, there's some way in which you are being called to give yourself. Not receive! You can receive all those other things by yourself. But if you're being called to be a member of the Discalced Carmelite family, you are being called to give yourself in some way."

(Fr. Deeney's talk, *Responsible Leadership and Collaboration*, Appendix B)

Hence, "election to a position in the community is for the purpose of doing a service to the community... Our structure is completely on a rotation basis. You are and then you are not; and you might be again, or you might not be again; but you are always a member. You are always a visible sign of the Church because you are a member, not because you are the President, or a member of the Council or the Formation Director."

(Fr. Deeney, *Welcome*, pg. 116)

Consequently, as a leader, it's not your responsibility to be the best at everything or know more than everyone else in the community. Instead, your role is to be a facilitator ensuring that the community has all the resources to nurture the members and succeed in its mission.

This concept of being a member needs to be part of formation and should always be nurtured and practiced in our communities.

It is important how well the communities recognize and adjust to the different types of leadership and the different ways of doing things. Failing to do so leads to cliques and divisions. When this happens, it is detrimental to the community's morale.

In addition, everyone in the community needs to understand how the Council ought to function — its responsibilities and limitations — so that they can cooperate constructively with those in leadership and serve well if called.

We highly recommend that communities, councils, and candidates periodically review together (especially just before elections):

- Fr. Saverio Cannistrà's March 6, 2019, letter to the OCDS (Appendix C)
- Fr. Aloysius Deeney's article, *How Ought the Council to Function?* (in *Welcome*)
- Fr. Aloysius Deeney's talk, *Responsible Leadership and Collaboration in Light of the Constitutions* (Appendix B)
- Relevant paragraphs of the Constitutions and Provincial Statutes
- Relevant best practice articles on the provincial websites

Jesus called them together and said, "You know that the rulers of the Gentiles lord it over them, and their high officials exercise authority over them. Not so with you. Instead, whoever wants to become great among you must be your servant, and whoever wants to be first must be your slave — just as the Son of Man did not come to be served, but to serve, and to give his life as a ransom for many."

(Matthew 20:25-28)

Centrality of the Order and the Church in the Program of Formation

Understanding the structure of the Order is an integral part of formation. We are not just one isolated community; we are rooted in the Order as part of a harmonious whole. “The Order is the friars, the nuns and the seculars. Part of our mutual support is your mutual support to each other” (*Welcome*, pg. 112).

According to the OCDS Constitutions, the Secular Order is a distinct branch of the Order. However, it is not an independent branch as are the friars and the nuns. “The Secular Order is juridically dependent on the Discalced Carmelite Friars” (OCDS Const. 41). Thus, it is important for the Carmelite Seculars to recognize the vital presence of the friars in our community lives and be mindful of their valuable contributions regarding the overall formation of the candidates.

In his May 24, 2021, letter to the Carmelite Seculars, Fr. Saverio Cannistrà, OCD, Superior General, reiterates the importance of collaboration with the other two branches of the Order — the Teresian Carmelite Family. He observes with concern the “emergence of polarizations and radicalizations” (#3) among some members of OCDS. “Hence, our urgent need to rediscover those spiritual dispositions outlined in our Rule” (#4).

“This is especially true in regard to meditation on the Word of God instructing us to safeguard our memory and keep our hope alive, constantly renewing our covenant with God in Christ. This was the example set by Sts. Teresa of Jesus and John of the Cross during their lifetimes: although immersed in the current problems of the Church and of the Order, their hearts were always fixed on their Trinitarian fatherland. Like them, in a humble and trusting relationship with the Lord, we must seek to find the inspiration and strength to work in the service of the Church and our Order. Again, like them, we must journey and work together...In this way, it is essential that every member of our Order feels co-responsible for that area of the Church to which he/she belongs, as well as building up their own Carmelite community with active and mature involvement” (#4).

As can be seen, the ecclesial dimension of the OCDS vocation demands that every aspect of formation be imparted in profound communion with the Universal Church. “The Carmelite Secular is called to live and witness the charism of the Teresian Carmel in the local Church” (OCDS Const. 27). Consequently, we — as the family of Teresian Carmelites — repeat the words of Our Holy Mother St. Teresa: “I am a daughter [or son] of the Church” and Our Holy Father, St. John:

*Awaken and enlighten us, my Lord,
that we might know and love the blessings which
You ever propose to us, and that we might understand
that you have moved to bestow favors on us
and have remembered us”
(Living Flame of Love 4:9)*

Fellowship — the Social Hours

As previously stated, formation in OCDS communities and groups is not limited to formation sessions and spiritual conferences. Our program of formation embraces all facets of Carmelite life in a community setting.

Fellowship is an integral part of the community meetings, and the Council is responsible for fostering the sense of “togetherness” in the community. While study and prayer are important, meetings also need to include time to relax together as friends (see *Welcome*, pgs. 94-95).

We could take a hint from St. Teresa when she was forming St. John of the Cross to be a Discalced Carmelite. In *The Book of Foundations*, she writes: “...there was an opportunity to teach Father Fray John of the Cross about our way of life so that he would have a clear understanding of everything, whether it concerned mortification or the style of both our community life and **the recreation we have together**. ... [I] could have learned much more from him than he from me. Yet this is not what I did, but I taught him about the lifestyle of the Sisters” (*Foundations*, 13:5, emphasis added. See *Welcome*, pgs. 94-95).

So, we take that hint, that fellowship is part of formation. Recreation is a very Teresian term. For some people, recreation — spending time together — is simply a waste of time. **If you don’t know how to waste time together, you are not building a relationship.** It’s really not wasting time; it is using time to relax together. There must be fellowship as part of candidate formation, getting to know everybody, because that is what avoids divisions (see *Welcome*, pg. 95).

Celebrations — Profession/Reception Day

The high point of formation is expressed in the joyful celebration of the community Profession/Reception Day. The Aspirants’ reception of the Large Ceremonial Scapular, the First and Definitive Promises of the candidates, and the vows, all take place in a cordial atmosphere of community gathering. The family and friends of the participating candidates are invited, and the ceremony takes place in the presence of the whole community. The occasion is truly an exciting and humbling moment for all, especially the participating candidates. The ceremony is followed by a feast of various foods and drinks. Cards and flowers are exchanged. Sometimes, a memento (cross, book, Bible, picture) is given to mark the occasion.

Each stage of formation is a step forward in spiritual maturity, prayers, and celebration. The feelings of jubilation [of prayer] expressed by St. Teresa aptly describe this special day of celebration: The joy is “so excessive that the soul wouldn’t want to enjoy it alone but wants to tell everyone about it...” Thus, the soul radiates this love outward and draws people to it as if in a communal celebration. “It seems it has found itself and that, like the father of the prodigal son, it would want to prepare a festival and invite all...” (*Interior Castle* VI.6:10).

Conclusion

Human formation, as understood by our Holy Mother St. Teresa, is a transformative process from worm to butterfly and beyond. The transformation of a person develops gradually, in

stages, over a lifetime, rather than in a short moment of reflection. The OCDS formation program is designed to accommodate human formation within the context of Christian and Carmelite formation.

“... St. Teresa placed prayer as the foundation and basic exercise of her religious family. For this reason, Secular Carmelites are called to strive to make prayer penetrate their whole existence, in order to walk in the presence of the living God through the constant exercise of faith, hope and love, in such a way that the whole of their life is a prayer, a search for union with God. The goal will be to achieve the integration of experience of God with the experience of life: to be contemplatives in prayer and the fulfillment of their own mission” (Ratio 47 and OCDS Const. 17).

We are part of the Discalced Carmelite Order, living the same Spirit of Carmel in the world as those in the monasteries and convents. “Know that if it is in the kitchen, the Lord walks among the pots and pans helping you both interiorly and exteriorly” (*The Foundations*, 5:8).

It is important that formators understand and encourage the candidates to learn and to integrate Carmelite spirituality into their lives as laity. They give daily witness in their family and social life to “an integrated approach to life that is fully brought about by the inspiration and strength of the Gospel” (*OCDS Constitutions* — Epilogue).

Consequently, “the ‘world’ thus becomes the place and the means for lay faithful to fulfill their Christian vocation, because the world itself is destined to glorify God the Father in Christ... They are not called to abandon the position that they have in the world. Baptism [and their vocation to Carmel] does not take them from the world at all, as the apostle Paul points out: ‘So, brethren, in whatever state each was called, there let him remain with God’ (1 Cor 7:24)” (Christifideles Laici, *the Lay Faithful and Their Secular Character*, no. 15).

“Trust in the Lord with all your heart, and lean not unto your own understanding. In all your ways acknowledge Him, and He shall direct your path” (Proverbs 3:5-6).

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Appendix A: Keeping track of individuals – candidate files

Many Formation Directors create a master calendar or flowchart to keep track of when to start various tasks, who is responsible for which tasks and how early to remind them, deadlines, where candidates are in formation, when extensions end, etc. This can be especially useful when there are many candidates at different levels. And it makes the hand-off to a new Formation Director much easier.

Formation files are kept for each candidate, beginning with admission to Aspirancy through to the Definitive Promise. The purpose is to help the Council keep track of each candidate and to provide information for future Councils.

Include:

- attendance records,
- reasons for absences,
- how the missed formation sessions were made up,
- community jobs and how fulfilled,
- formator comments,
- Formation Director and Council observations,
- notes of the periodic reviews,
- discernment documents for First Promise (interview notes, Promise request letter, Council discussion and vote),
- anything else that seems relevant.

The files are confidential and are available only to the Council, the Visitor or Regional Representative, and the legitimate Superiors of the Order.

Once a member has made the Definitive Promise, the candidate formation records are destroyed to protect the member's privacy in the future. However, if a candidate discontinues, seal and archive the file in case the person later asks to be re-admitted locally or to another community.

Appendix B: Responsible Leadership and Collaboration in Light of the Constitutions

Father Aloysius Deeney, O.C.D., General Delegate

Transcript of address at the Western Regional Congress, June 17, 2007

Good morning, Carmelites!

You know in 1988, I came back from spending a year in Avila in Spain where I studied St. John of the Cross. I was invited to many places including here to Washington in 1989 and 1990. It was here in Seattle. I was invited all over the country: to monasteries of nuns and to secular order groups to talk about St. John of the Cross. It was really wonderful. I really very much enjoyed it. I was very welcomed every place, all the time. Now I am invited many places to speak, but I've almost stopped talking about spirituality, and I am always talking about organization. I've been invited to talk about organization here as well. But I am going to change it around and talk a little bit about spirituality. But the spirituality of organization!

The Rule of St. Albert, the Source of Living Streams, is a source that continues to give itself to us. And yes, somebody had mentioned yesterday that it is more than just a plan of life or formula of life or an organization. It's actually a source of inspiration for living the spiritual life. There is a fundamental presumption in the fact that these hermits asked St. Albert of Jerusalem for a formula of life. It was that these hermits, who were now together, did not know how to be alone without being together and needed something to guide their togetherness.

That also is the basic presumption that comes through the spirituality especially of our Holy Father to which I'm going to refer, the spirituality of St. John of the Cross, in that we do not know how to be alone before God or by ourselves. We need to come together in order to learn how to be alone before God. With that realization in our minds we can then look at: Why are we organizing ourselves to begin with? That will purify many things that come through in our organization.

Yesterday [June 16, 2007], thanks be to Father Pat McMahon's outline of the five points of the classical letter of the early Middle Ages, where there was the introduction — the salutation and the *exordium* [exhortation], and the application, and the *petitio* [petition], and the *conclusio* [conclusion].

I want to point out some things in [St. Albert's] *Rule of Life* that talk about governance. Because he says in the first part, "This is what I expect you to have." He says, The first thing I require, the first thing. You want to learn how to live alone? You want to learn how to be a hermit before God? You want to learn how to live deep spirituality? The first thing I require of you is — not to go to Mass every day. The first thing I require of you is — not to say the canonical hours or the 50 Our Fathers and 75 Our Fathers on feast days. The first thing I require of you is that — you have a prior. You have somebody in charge; one of yourselves, who is to be chosen for the office by common consent or that of the greater or more mature part of you. Second thing, each of the others must promise him — obedience, of which, once promised, he must try to make his deeds the true reflection. Then later on, in 1247 (and also chastity and renunciation of ownership), the basic idea was that we, as members, were to make our lives a reflection of cooperation and collaboration with the one who was in charge.

Now remember Father Pat said that there was first what was expected and then the application, because there is, later on, an application of how this collaboration and cooperation was to function. In no. 15 of *the Rule* of St. Albert: "On Sunday too or other days, if necessary, you should discuss matters of discipline and your spiritual welfare, and on this occasion, the indiscretions and failures of the brothers, if any be found, should be lovingly corrected."

So he not only says that you're to have a prior, but he says how the prior is to function. You discuss things. You are to meet on Sundays, then discuss the discipline of your lives, how are your lives going? There is the promise of obedience, which means you listen. That's what the word obedience means, that you listen, but it also means that you speak. In the way that this is described, you are to meet on Sundays to discuss "how is your life going?" Now we know that there are different systems, even in the Church, there are different systems of governance. We have a hierarchical system, correct? It's the pope and the bishops, the parish priests and the parishioners. You might say there is the most basic line of how things function in the Church, in the hierarchical system. This is not a hierarchical system, because the prior is someone who is elected from among the members or by the more mature members, the greater part of the community who elect the person who is supposed to be in charge.

Anyway, the person who was elected to be prior, his first purpose for being, was supposed to be that he could handle the business of the community (have his cell closest to the entrance gate of the compound where the hermits lived). But the actual decision of how the community was doing, the evaluation, was done through the community meeting, which was held every Sunday. So it was not something where the prior was understood to have the answers and it was up to the community of hermits to abide by the answers given by the prior. It was that the prior was to handle the business of the community. The others were to cooperate with him, and they cooperated with him by every Sunday discussing what was the nature of the community life: how was it going, what needed to be done, what was being done well. That, to me, that's the original way that the community on Mount Carmel was to function. The prior's biggest responsibility had to do with outside the community, because the evaluation that was done on Sundays by the community established how things were to be done.

In the *Constitutions*, no. 46, which is a section taken right out of the *Rule of Life*, just repeated word for word, I believe: "The council, composed of the president and the three councilors and the director of formation, constitutes the immediate authority of the community. The primary responsibility of the council is the formation and Christian and Carmelite maturing of the members of the community."

Now, if that's the primary responsibility, "...the formation and the Christian and Carmelite maturing of the members of the community," it also reflects what is the primary responsibility of the members, correct? The primary responsibility of the people who are in charge of the community (of those who have inherited the place of prior from the tradition of *the Rule* of St. Albert), if the primary responsibility for those people is to organize the formation of the community and to assist the members in maturing both as Christians and as Carmelites, then the primary responsibility of the members is participation in the program of formation and participation in the programs that help in maturing and identifying ourselves as Christians, as Carmelites.

So it's not just simply the structure or the spiritual inspiration that's given for being a member of the secular order or participation in the secular order. It's not just some system of governance. But it actually and very much is a way to participate and grow in the spiritual life. That's why we came here. We did not come here just to join one other organization. We came here moved by the desire to grow in the spiritual life. And that desire to grow in the spiritual life, we find we came here because we could not do it alone. You were sitting in your home, or you were sitting in a church one day, and you heard someone talk about Carmelites or Discalced Carmelites or third order and maybe you thought to yourself, I'd like to find out about that. But you got to a certain point where you said, I need that — I need what that is because I'm not doing it perfectly all alone. I am doing it so imperfectly [that] I feel like I am not doing it.

So I join the organization, but when we join the organization it's not just like joining a club. It demands our participation in it. Because the effects for which the organization exists will have no fruit unless I participate in it. Make sense? And so the purpose of the organization is to produce fruit in our spiritual lives. But in order to participate in it, there are some spiritual principles involved in the participation. *The Rule* of St. Albert laid down the requirement that there be someone responsible for the community. The other members of the community were to cooperate in obedience with that person. They were, however, to arrive at decisions about the community through the community meeting, through discussion. There is no presumption that the prior speaks for God. The presumption is that it is the community's discernment that determines what is the will of God and how we are living.

In the *Constitutions*, quoting exactly the *Rule of Life*, which I think reflects the nature of the secular order, see there are nos. 46 and 47. The most important part of the requirement for leadership in the communities is no. 46. Forty-seven has to do with housekeeping, all those little things, among which is to dismiss a member. (Which has seemed to have gotten out of hand in some ways, or some places, where people are looking at dismissing members as something that they have some divine right to do.) What the divine obligation to do, for those who are responsible for the community, is formation and the Christian and the Carmelite maturing. Your collaboration, your cooperation as a member (our cooperation because this applies to us who are friars) [is to] cooperate and collaborate in obedience, so that we might grow in our vocation as Carmelites. It's not just to comply, or it's not just to keep the peace, or just to not ruffle any feathers. It's actually to cooperate in order to grow in the spiritual life.

Now I want to talk about a few things that St. John of the Cross says to us, about spiritual direction, because the spiritual purpose for which we became Carmelites is the overwhelming purpose. It's the only purpose that gives any sense to being a member of the secular order, to grow in the spiritual life. And in a sense since the leadership or the governance of the community is for the purpose of assisting people to grow in the spiritual life, St. John of the Cross has certain things that he says to us as members or directees and certain things that he says to us as leaders or directors.

And I want to take these things that St. John of the Cross is speaking about spiritual direction — and he's talking about receiving spiritual direction and he's talking about giving spiritual direction — but I am applying it to membership in the community and leadership in the community. In the second book of *The Ascent of Mt. Carmel*, in Chapter 22, St. John of the

Cross goes through a large reflection on the humanity of Christ, which we read in the Divine Office once in the liturgical calendar of the year, this section is read and another time on the feast of St. John of the Cross for us who are Carmelites. And it's where St. John of the Cross says, "God could respond as follows: 'I have already told you all things in My Word, My Son, and I have no other Word. Fasten your eyes on Him, look for Him, seek Him.'"

He applies this in the Incarnation of Christ, in the Word spoken by the Father; God has revealed everything. And he takes that Word spoken by the Father and applies it to spiritual direction. St. John of the Cross says in Article 9 of the 22nd chapter in the second book of *The Ascent of Mt. Carmel*. He says this, "What God said at that time did not have the authority or force to induce complete belief unless approved by priests and prophets."

Then this is the line, "God is so content that the rule and direction of man be through other men and that a person be governed by natural reason that He definitely does not want us to bestow entire credence upon His supernatural communications or be confirmed in their strength and security until they pass through this human channel of the mouth of a man." So he's saying in terms of spiritual direction, that God is so content, *contento*, God is happy. God is so happy that we be directed by men (by human beings). God is so happy that we be directed by human beings that He does not wish us to put trust or confidence entirely in what we think, in what we feel, in what we receive, unless it's confirmed. This gives us an attitude of, with regards to the spiritual life, the necessity for direction.

We have come here to Carmel, myself, yourselves, moved by the desire for God, so we know that we need the direction that comes to us from this organization that we have joined. It's not optional, and we have to approach this with the necessity of listening to what is said. We have a spiritual obligation — to cooperate. We cooperate with our confessor, when we confess to him. We cooperate with our spiritual director when we listen to what he has to say and are even willing to abandon what we think in order to trust. And we have a responsibility to cooperate, to work together, to collaborate (they all mean the same thing) with the one who is directing us in the leadership of the community. As members, we must have this disposition, to cooperate with the community, with those who are leading us. As often as God reveals something to a person, God confers a kind of inclination to manifest this to the appropriate person. Until a soul cooperates with the authority, he is restless. He's not restful.

No. 11 of the same chapter is about the soul cooperating with the spiritual director, and I am saying that this spirituality which comes from John of the Cross also informs us and forms us as members of a community. This is the trait of the humble person (a side point, how important is the virtue of humility in the writing of St. Teresa of Jesus. In *The Way of Perfection*, remember it's detachment, fraternal charity and humility: "And even though I mention this as last, it's more important than the other two because it includes the other two.")

So this is the trait of the humble person. The humble person is the person who is the member and the humble person is the person who is the leader. But this is the trait of the humble person; he does not dare deal with God independently. Nor can he be completely satisfied without human counsel and direction. God is desirous of this, for to declare and strengthen truth on the basis of natural reason, He draws near those who come together in an endeavor to know Him. There's the whole cement of community life. It is a cement, community life. We did

not come here to live community life. We live community life in order to do what we came here to do.

You form community. You don't find it when you get there because when you get there the community is changing, and you're forming community, and you're joining and the cement of this is to come together to know what is it that God is asking of us. What is it that God is asking of me? I join a community in order to learn it. And I am a member. Before I am ever a leader, I am a member of a community. No one, absolutely no one, in religious life has a vocation to be a leader. We have no hierarchy. Everyone has a vocation to be a member, and certain members are asked at certain times to take on the responsibility of leadership, but no one has the vocation to be president of the community. No one. Everyone has a vocation to be a member of a community. So we approach this membership as the most important part of our spiritual life.

The second half of paragraph 11 of the 22nd chapter of the second book of *The Ascent of Mount Carmel*: "Thus God announces that He does not want the soul to believe only by itself the communications it thinks are of divine origin, or for anyone to be assured or confirmed in them without the Church or her ministers. God will not bring clarification and confirmation of the truth to the heart of one who is alone. Such a person would remain weak and cold in regard to truth." Remember this is St. John of the Cross, our Holy Father, who is writing for us who come from a very eremitical tradition. But remember that the original hermits were not solitaries. They were living together and wanted to learn how to be alone. So this spirituality of membership, this spirituality of being a directee, the one who receives direction from someone else, this guides ourselves whether it's you or me or Sister [from Seattle Carmel] yesterday. As Carmelites we are members and that's what gives us our identity. And that's why we came here, to be a member with other members so that we can know God.

It's rather demanding what St. John of the Cross then said about being a spiritual directee. It's very demanding. We're not our own director, and that's what we really have to avoid. You can look in *The Sayings of Light and Love* what St. John of the Cross says about people who direct themselves, who listen to no one else but themselves. If you want to know what that looks like in the spiritual life, you can look in your own communities and see people who direct themselves as members of the community and how they do not build community. In the beginning then we say that they're a little bit different: "Well that person's a little bit different, you know." But then in the end we say "that person is a pain." But that pain came from that being a little bit different. And that little bit different came from not listening, not listening. Hearing but not listening. So that there's a demand that St. John places on people who are going to enter spiritual direction. And that demand is to listen. In your heart, to cooperate with the Holy Spirit, who speaks through direction and that God's very happy that we do things that way.

It also guides our way of being, of being members in the community. Remember when I said being members in community has never been, in the Carmelite tradition, being "yes men." Remember I said in the very beginning that the way things were done was by discussion. So yes, we cooperate, we listen, and we do that after we have spoken what we think, how we understand things, the way we see things. And having done and said and spoken what we think, we then listen and cooperate. So as members we have the obligation to speak our minds. And

after having spoken our minds, we have the obligation to cooperate with what is decided. And that's the importance of the business meeting that's part of your community structure, is that you have the opportunity, not just to listen to what the council has decided, but that you actually have the opportunity (and it's the importance of the opportunity) to say what you think and when it's done, to cooperate.

Okay, now St. John of the Cross has some very interesting things to say to spiritual directors. And it's in the third stanza of *The Living Flame of Love*, from about Section 34 to 72, where St. John of the Cross talks to spiritual directors. St. John of the Cross says (here's the principle) a person goes to a spiritual director because the person wants to grow in the spiritual life. A person comes to the community of Carmel because they want to grow in the spiritual life. Now we've looked at, a little bit, how being a spiritual directee has its influence on being a member of the community. Spiritual directors have certain things that they must remember if they're going to be a spiritual director and remembering these, we're going to apply these principles to the role of leadership in the community whether it's for the friars or the nuns or the seculars. But it's the same spirituality that fills the role.

God alone is the agent. That's the principle that begins this discussion on spiritual direction. Now if God alone is the agent, then the spiritual director must be very humble before God, wanting to know not what I want to do, but what does God want. I can be very clear about what I want done, can't I? I can be very clear about what I want done. What does God want done? What is God doing with these people? St. John of the Cross says there is as much difference between what the soul does itself and what it receives from God as there is between human work and divine work, between the natural and the supernatural. In the one, God works supernaturally in the soul, and in the other the soul works only naturally. But the point here is that there is as much difference sometimes between what I want done and between what God wants done as there is between the natural and the supernatural.

"Let directors be content with disposing [these people that they are directing] for this according to evangelical perfection, which lies in nakedness and emptiness of sense and spirit... In this matter of striving for perfection, not to turn back is to go forward" (*Living Flame*, Stanza 3, nos. 47, 48). If someone is not going backwards they are going forward. That's the presumption. You don't see them going forward; you see them going backwards.

About spiritual directors or about leaders or about presidents or about council members. Perhaps in their zeal these directors err with good will, because they do not know any better: "Not for this reason should they be excused for the counsels which they give rashly without first understanding the road and spirit a person may be following and for rudely meddling in something they do not understand instead of leaving the matter to One who does understand."

You are the president of a community and you have 22 members of the community and you have a council of four other persons (there is a council of five persons) so that leaves 17 other members. There could be 17 other ways of approaching God. There are 17 other ways because each person approaches God as an individual. If you have a very monolithic, one way of doing things, which is usually your way of doing things, then you're going to expect that everyone fits in that mold. And expecting that everyone fits in that mold, you're going to see people outside of that mold and you're going to say, "They do not belong." Whereas if you realize that you are

in some way or another acting so as to introduce this person to God, who is leading this person in this way, then you're going to look and say, "Well, this person is moving at his or her pace and at his or her way." You're going to be open to understanding — what is God asking of this person, how is God asking this person to be a Carmelite?

All right, there are plenty of indications as to which one must be a Carmelite and things that one must do and there are indications as to people who have no vocation to Carmel:

- They have no interest in Carmelite spirituality
- They have a Marian spirituality that has nothing to do with contemplation or meditation or Our Lady of Mount Carmel
- Or they are not practicing members of the Catholic Church.

These are indications as to who does not have the vocation. But once all of us have entered into it, there are as many ways as there are persons. Even our Holy Mother St. Teresa in the fifth chapter of The Book of Foundations begins by saying: "There are many ways in this way of prayer and I'm going to write a few things about one of them." That thick! The few things she writes are about — that thick, about one of those ways!

There are so many ways to be a Carmelite. There are many ways not to be one and they are clear if we follow reading through the Constitutions or reading through the spirituality but there are also many ways [to be a Carmelite]. This is community life and not communism. We're not being forced to be a certain way in order to grow. As a matter of fact, if we force people to be a certain way, I guarantee you: they will not grow. So the spiritual director, therefore the leaders in community, have to be very aware that God leads souls along different paths. "Granted", says St. John of the Cross, "that you may possess the requisites for the full direction of some soul, for perhaps it does not have the talent to make progress. It is impossible [he doesn't say it's difficult, he says it is *impossible*] for you to have the qualities demanded for the guidance of all those you refuse to allow out of your hands. God leads each one along different paths so that hardly one spirit will be found like another in even half its method of procedure." [Living Flame of Love, third stanza, Chapter 59]

The greatest obligation, therefore, on those who have the responsibility of leadership is to respect the differences that exist in the members of the community. I believe that those who are given the responsibility of leadership in community are called to a deeper humility. Because it's a humility that almost can be crucifying. They elect you to come up with all the answers and you know you don't have them. They elect you to decide things and you don't know what to do. It is a deeper humility that's required and the humility demands a deeper cooperation with the members of the council. And the deeper cooperation with the members of the council increases the responsibility of the council to listen to the members of the community.

The council is not like the bishop. The bishop has a vocation to be leader. He therefore receives the grace to be leader. We have the grace to be members. And out of that membership, we cooperate in leading the community. Then when we're no longer the leader, we go back to being a cooperator. The bishop never goes back to being a diocesan priest. It's a different vocation. But we can't use that model for understanding how we function.

I have a few communities that are directly under my tutelage in different countries of the world. I'm the spiritual assistant for some communities in Malaysia and in Romania. I only visit them twice a year, but anyway some of those communities are still in the process of formation. And last year, in two of the communities in Malaysia, they had their first elections three years ago. The first time they ever elected. They're still not canonically erected communities. They're rather young in their history. One's maybe 11 years old, the other's seven years old. So after two years, I took the people who were responsible out of responsibility, and then appointed other members, not elected. And I told them I was doing it for two reasons. I wanted to see how the communities ('cause they're brand-new communities) I wanted to see how do these communities adjust to different personalities, different types of leaders. Because there are different types of leaders, there's no one way to do everything. So they're going to now arrive at professing definitively their first members and be established as a community of the secular order, canonically established and follow the rules. I want to see how they adjust to having different leaders. That was the one thing because that is very important.

The second thing I wanted to see was how do the leaders adjust to being only members. Do those leaders who come back now, join back in, in being members and cooperate? Or do they think they knew how to do it better and become uncooperative? Were those, with whom they're supposed to be, cooperative? One community's doing very well, the other community is not doing as well. What we see in the ways that we do things is that there are interchanges that take place in our roles in the community but we're always members.

So what St. John of the Cross says, about giving the spiritual direction and the humility that's required to give spiritual direction, and the realization about the one who gives spiritual direction must have is, namely, that they do not have all of the answers for everybody that comes to them — and also helps or informs or guides or gives a spirituality to the way that we fulfill the role of leadership. We do our best in cooperation, certainly with the council, but we must realize that after we have done our best, we must trust God with the results. So I take these two attitudes, actually it's one basic attitude, to be humbly before God, a member of the community, and when called upon by the community to realize that we're called upon by God to fulfill a responsibility to the community, to fulfill that responsibility, humbly. Not with arrogance! Not giving the impression that I know and you do not! Because we must be aware that we could be trampling on the Holy Spirit active in the life of another person. But equally as members, we must realize that before God we are charged with the responsibility of cooperating with those who have this burden to be leaders and that this cooperation that we have to give speaks about the maturity of our spiritual life.

QUESTIONS AND ANSWERS

So in order to leave time for questions, that's basically what I have to say about the role of leadership from a spiritual perspective. But I want to leave time now for these questions that are written. I have no idea of what they are.

Q: There is a situation where the council of the community asks the spiritual assistant for help in discerning whether to accept a candidate for the promise. The spiritual assistant replies, "He has good attendance at the meetings so he should make the promise." How can the council go forward to a more careful discernment for the candidate?

A: Well, number one, the primary responsibility for discernment does not go to the spiritual assistant. Primary responsibility for the discernment belongs to the formators and to the council of the community. The spiritual assistant is consulted, and I hope that the spiritual assistant is not a Carmelite! Probably not a member of community life because if the only point of evaluation is the attendance at meetings then it's more like, if the factory belt is working that they've gone along and so far so good! My definition of the eternal optimist: the eternal optimist is the man who falls from a 40-story building who is heard to say as he passes the 20th floor, "So far, so good!" So then if the only evaluation for whether or not someone should go to the next step is "they stayed on the belt," but the evaluation is not for the spiritual assistant. He's consulted. The work of the evaluation belongs to the community: to the council, to the formation director. That's where the work of the evaluation is.

So this question seems to me to present the idea that it's possible that in some communities the spiritual assistant still does the evaluation and the community is not doing the evaluation to the extent that it does. In many ways I bet you if the community does a good evaluation, if the council, if the formation director does a good evaluation of a person, when they consult with the spiritual director, he's probably going to say yes, if the answer was yes from the community. And if the community does a good evaluation and they say no, probably the spiritual assistant is going to say "Oh, no." But it's when the community is not doing an evaluation that there's confusion as to even what is the role of the spiritual assistant. OK?

Q: How do you address the issue of people who have been in the community for 15 years but refuse to hold any office or position?

A: Oh, how do I address that? Well the first thing, the first observation is that something was lacking in formation, unless there's a specific reason for why that person cannot fulfill an office. You know, if there's some particular reason that has to do with health or with work obligations or others things, that dispenses that person, but I presume the question comes from the background of well, people just don't want to do. Sometimes people just don't want to be bothered to do things for community. And that again is a problem of the discernment of the people who then become part of the community and the formation of people who become part of the community. Because you know you do not have to be here to live Carmelite spirituality. You don't have to be a secular order member to be a layperson who lives Carmelite spirituality. You can live Carmelite spirituality without being a member of the secular order. You can pray the Office every day. You can make mental prayer. You can read St. Teresa, St. John of the Cross. You can pray to Our Lady of Mount Carmel, have a great devotion, go to every Carmelite feast-day Mass and not be a member of the secular order, and that's fine. If you're a member of the secular order, there's something else involved. If you're a member of the secular order there's some way in which you are being called to give yourself. Not receive! You can receive all those other things by yourself. But if you're being called to be a member of the Discalced Carmelite family, you are being called to give yourself in some way.

Now there may be reasons, we all recognize, there may be reasons why people cannot do certain things, but being too humble is not one of them. "Oh, I'm not worthy!" Who cares? We all know you're not worthy, but you can go ahead and do it! It's not you that needs to do it, it's the community that needs you to do it. OK? Sometimes there are people who want to do it who

are really “not worthy”: “I should be the Formation Director, because I know better than what she’s doing.” “I should be the president because I’ve been the president for the last 15 years and should still be the president.” No, there are reasons for which people ought to and reasons for which people ought not to do certain things in the community. But if this is a question of someone who has come to the order for reasons that are not valid and has been formed with a formation that has not challenged those reasons and has remained, they’re not going to do it because they don’t want to do it. And you’re not going to be able to change them.

What you have to do is be sure in your discernment and formation of members that you don’t repeat that in new people that are coming. Remember not everybody needs to be here. St. Teresa knew that. St. Teresa, if you specially read in the letters, sent many people home who thought they knew everything what it meant to be about being a Carmelite. She sent them home. She didn’t need them in her communities.

Q: What does a council member do who is accused falsely of several things in front of other members of the community and this accuser is the president? A one-way conversation is done by president who refuses to talk privately with the council member and who then takes it to the council for a possible solution and is told by another council member it does not belong in the council. But the president agrees to see the spiritual director but it is not solved. Council member has tried to help president ever since.... What is the solution?

A: Now I want to get this straight... in parentheses it says at a one-day retreat. So at a one-day retreat the president accuses a council member falsely (it doesn’t say what accused of) of several things and it’s in front of other members. A one-way conversation is done by president who refuses to talk privately with the council member. The council member then takes it to the council for possible action and is told by another council member.... This council does not know what it means to be a council. There is something that is lacking altogether in the council’s understanding of what it means to be a council. There is something that is lacking in understanding by the president as to what it means to be president of the community and of the council. There’s something missing altogether. So that is there’s no ability to have communication among the members of the council, the community’s at a great disservice. The community’s suffering more than the council member who suffers this, because there is a lack of leadership that looks to trying to resolve issues.

First of all, to accuse anybody of anything without having first accused them only alone, then there’s something missing in that community. The solution is to have a new election. That’s the only solution I could think of. If something is in such disarray as to have this kind of a situation, it needs to be rearranged. It needs to be redone. To me that’s the only solution because there are already people who will not speak to each other.

Q: Are the O.C.D.s and the O.Carms getting closer to unity?

A: No. We both serve Christ (underline, underline!) in different ways. Yes, but we both serve Christ differently. We are two different orders. You could say are the O.C.D.s and the Dominicans getting closer together? Are the O.C.D.s and the Franciscans getting closer together? We have the same fount, but it has produced different fruit. We have the same fount in having St. Albert.

Father Pat [O.Carm.] had to leave. I don't see him anymore, but I am sure that he would say the exact same thing. Yesterday he was talking about he's an O.Carm because he thought he was going to be O.C.D. and then found out there was a difference. Didn't stop him ... he didn't say, "Oh my goodness, I have to become an O.C.D.!" But he said God has us exactly where God wants us to be. I've been involved both as provincial, when I was provincial in my province — it's when the five provinces (Father Gerald was provincial at that time. He's still provincial, for goodness' sake). It seems to me like 16 or 17 or 27 years ago or whenever it was that we established the Carmelite Institute, an institute that's sponsored by the five provinces, three O.C.D. and two O.Carm provinces. We have many things in common. The one thing we do not have in common is the charism, that identifies, distinguishes us.

So, yes, we have many things in common. We share many things in common, but not that which most identifies us in the way in which we are Carmelites. Father Pat answered this yesterday in many ways by talking about how we very much look to St. Teresa, St. John of the Cross. That they look to Albert of Jerusalem, the Rule and the figure of Elijah. One of my professors in the courses I had in Spain said, "When I listen to Elijah, it is the voice of Teresa that tells me what he says." And so it is Teresa who very much identifies for us, what is in this charism that we have together in common. And she explains it in a way, differently, than the explanation that the members of the Ancient Observance may understand things. Yes, we listen to Elijah. We listen to the Rule of St. Albert. But it is the voice of our mother, St. Teresa, that tells us what it means.

Q: Is there a confession guide book for people who go to confession weekly or every two weeks?

A: You might ask the person who's selling the books. There is not one official... I've seen in the missals before Vatican II there was always a guide for confessions in front of missals... different kinds of missals. I'm sure there still are. I'm positive there still are. But there's not one that I would say is Carmelite. Unless there are Carmelite sins...

Q: Is attendance at meetings required by the Constitutions? I have been told that it is strongly recommended but that only Morning Prayer and Evening Prayer and mental prayer are required.

A: No. 1: Nobody has to be here to follow Carmelite spirituality, correct? Can you legislate common sense? You cannot legislate common sense. "Is attendance at meetings required?" is a different question than the question, "Is attendance at meetings required by the Constitutions?" Is it required by the Constitutions? No. Therefore, nobody has to go to meetings. Does it say some place in the Constitutions, "You must attend meetings"? No, it does not say that you must attend meetings. Therefore, you have your answer if you want to just go up and say, "I can be a Carmelite all by myself." You will have missed everything that the spirituality says. You will have missed the entire spirit of the Rule of St. Albert and the spirit of the Constitutions. But go ahead. Live in your fantasy world!

[Note: Among other things, the 2014 additions to the OCDS Constitutions address attendance. 24.c: "... The Provincial Statutes are to establish a limit on unjustifiable absences, beyond which,

an individual will be considered inactive and liable for dismissal from the Community.” Dismissal from the community is dismissal from the Order.]

Meetings are indispensable for keeping ourselves on the right track in regards to what it means to be a Carmelite. They’re indispensable for checking ourselves, for not going off on our own tangent, for not thinking, “I know and they don’t,” for not being arrogant, for not being elitist — “They just aren’t where I am. I’m in a place different than they are.” Not that you might have anything to contribute to them if you’re so special!

You don’t go to meeting to get. If you go to meetings to get only, go away! You go to meetings to give as well. And if you have nothing to give, poor you! No matter how much you think you have, if you have nothing to give to your community, you’re really very poor. Meetings are not required by the Constitutions. That’s the answer to the question. But meetings are indispensable, I believe.

Can you imagine — who’s the Carmelite nun who lives outside of community? Carmelite friars who live outside; we have Carmelite friars who live outside of community. Generally speaking, they’re a little different! Generally speaking, they’re just a little different. I’m a little bit struck by this sentence: “I have been told that it is strongly recommended but that only Morning Prayer and Evening Prayer and mental prayer are required.” How minimalist are you, if you think you only do what is required? It’s like the man in the Gospel who goes up to Jesus and says, “I’ve done all those things. What’s required to get into heaven?” He comes up with the minimal. What’s required to get into heaven? Jesus says do this, this and this and don’t do that. Then he says, “I’ve done all these.”

“Oh, Oh,” says Jesus, “you want something more?”

“Yes, I want something more.”

And then who was the one? Jesus was sad.

Now, attendance at meetings is indispensable, but it’s not required. There are many reasons for missing meetings: sickness, work, family obligations that are really more important. I have often said that when you get to the throne of judgment, God is going to ask you first about your family and then he’s going to ask you, maybe, about being a Carmelite. And when I get to the throne of heaven, he’s going to ask me about my Carmelite obligations because I don’t have family. I sure don’t work!

With regard to what your obligations are, sure there are things, because of family and come to you because of work, that interfere with your responsibility to attend meetings. But it is responsible to attend meetings. The longer you do not attend meetings, the more difficult it is for you to stay in the middle course. This is why the Mother who was here yesterday, the prioress of the Carmel, and we friars, we live in community and this is why you have to make community in order to guarantee that Carmelite life is taking place for you as individuals. OK?

— *Fr. Aloysius Deeney ocd, gen. delg. ocds*

Appendix C: Fr. Gen. Saverio Cannistrà's March 6, 2019, Letter to the OCDS

CASA GENERALIZIA CARMELITANI SCALZI
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To my very dear Brothers and Sisters of the OCDS

In Christ Jesus and his Holy Spirit, greetings of peace and communion!

1. For some years I have been meeting with you through the letter to the OCDS. By this means, I want to exercise part of my service of "spiritual and pastoral care of the OCDS", as well as "guaranteeing the fidelity of the OCDS to the charism of the Discalced Carmelite Order, unity... and communion with the Church" (*Pastoral Care of the Secular Order*:1; 3:2; cfr. 6-7).

In this regard, I would like to reflect with you on some issues related to the *Councils of the Secular Order communities*. I would like to help you in the service of guiding communities, of which you are "the immediate authority" (CC = OCDS Constitutions 46). At the same time, I think that these reflections can also shed light on the service provided by the Provincial Councils of the OCDS in promoting formation, apostolate and unity in the Provinces, even if they do not have a legal authority on par with that of the local councils (cf. CC 57-58).

2. From documents concerning the Secular Order emerge the *characteristics* and *duties* of the local Council.

This is composed of a President, three Councillors and the Director of formation who has made definitive promises (CC 52-53). Together with the General and the Provincial, the Council has the responsibility of guiding the Community "in discerning and accepting God's ways" (CC 15), as legitimate Superiors of the Secular Order (CC 48). With regard to matters arising that are outside the "competence of the Council, it is the obligation of the President to bring it to the attention of the Provincial" (CC 47g).

The "primary responsibility" of the local Council is taking care of the "formation and Christian and Carmelite maturing of the members of the community" (CC 46; cfr. *Ratio Institutionis of the Secular Order* n. 6, 10, 11, 28, 29, 30, 31, 34, 35). In order that this may come about, the Council must meet frequently "in reference to taking care of formation programs and the growth of their own community" (CC 47). Other duties in the formation field are: to exercise discernment in admitting candidates to formation (cfr. *Ratio OCDS* 59-93), to first promise and to definitive promise and to give its consent to admit those called to vows (CC 36 b, c, d; 39; 47 a). For just motives and with the consent of the Provincial, it may reduce the period of formation to the first promise (CC 47 b); lastly, it can receive a member transferring from another community (CC 47 f).

Another fundamental aspect of the mission of the Council is involving the Community, remembering that it has a responsibility in formation (cfr. *Ratio of the Secular Order*: 28). What benefits this greatly is *preserving fraternal communion* within the Community according to the style of St Teresa. This, its crucial role, appears in article 24 d of the Constitutions, to which I refer you.

Every three years the Council must convene the Community for the elections of the new Council (CC 47 c), according to the electoral process established in the Provincial Statutes. Once the members of the new Council are elected, they appoint a Secretary and a Treasurer (CC 50, 54-55) from whom to receive the minutes of the meetings and the half-yearly report of the accounts. For a serious reason, the Council may replace a member of the Council itself (CC 47 d).

After consultation with the Council, the OCD Provincial appoints a Spiritual Assistant for the Community (CC 43); the Assistant, although not part of the Council, may be invited to participate in its meetings and consulted on the ability of a candidate to assume the responsibility of a vocation to the OCDS (CC 44). Here, in thanking every Assistant for his dedication, I mention that he is the guarantor of the fidelity of the community to the charism (cf. CC 44; *Guide for Pastoral Care to the Secular Order*, 14-18) and in charge of its liturgical celebrations (ritual 13, 31, 51, 66). In addition, the Assistant plays the most important role of being a bond of fraternal communion between the community and the friars and the nuns of the Order, in whose name he fulfils this ministry of assistance.

Finally, it is up to the Council to take care of the processes of dismissal of members of the Community, as well as evaluating and discerning together with a member who, of his or her own accord, wants to leave the Community (CC 24 e; 47 e).

3. From these duties, we see that the Council carries out a fundamental role of accompanying and leading the Community in its mission. For this reason, it ought to walk together towards it, encouraging the *communal character of the Christian and Carmelite vocation* and look upon each of the members with God's eyes.

The Church, being a mystery of communion (cf. LG 2-4), formed of people created in the "image of divine communion" (*Evangelii Gaudium* = EG 178; cfr. Gen 1:26, 27), Christians must bear witness to a "captivating fraternity" (Final document of 2018 Synod: 1), the root of which is in the Most Holy Trinity. Communion in the Church leads to communion with Christ (cf. 1 Jn 1:3), which in turn builds communion between men and women. In fact, in this communion, all the baptized participate in the commonly held meaning (*sensus commune*) of the faith (cf. LG 12; EG 119-120) and are called to become actively engaged in evangelization (EG 120). Thus, they "make real the human person's call to live communion, which comes about through sincere self-giving, union with God and unity with our brothers and sisters in Christ." Then, "the whole community, in the free and rich diversity of its members, is called together to pray, listen, analyse, dialogue, discern and offer advice on taking pastoral decisions which correspond as closely as possible to God's will" (cf. International Theological Commission, *Synodality in the life and mission of the Church*, March 2, 2018 (= ITC) 43, 68).

4. The authority of the Council is shared among its 5 members by different functions. Firstly, I think that the warning of our Holy Mother to the Discalced friars is also useful for the Council, that is, that "their leaders be in accord" (Spiritual Testimonies 64). It should be an authority lived "with a mother's love" and with "discretion" (S. Teresa of Jesus, Constitutions 34, or cfr. Foundations 18:6-8). Its exercise requires *active co-responsibility*, both within the Council itself in the choices and decisions to be taken, and in arousing the active and responsible participation of each member of the community, in decisions concerning the good of the

community and in the exercise of the discernment of truth. Today more than ever, in the face of social and ecclesial reality, a solid formation is necessary that leads to the practice of discernment in community. The community is then the fertile sphere of this; it should lead each member to be co-responsible for the community, its formation and its mission (GE 175; cf. Final Document 2018 Synod, 119-124).

Lastly, its character as a *temporary shared authority*, renewed every three years, indicates that the Council receives an authority of mediation and delegation from the community that elects it. It must therefore lead it according to the spirit and charism of the Teresian Carmel, according to what is defined in the OCDS constitutions. By fulfilling this condition, it elicits and strengthens the identity and sense of belonging to the Order, and favours encounter with God and with the brethren, thus facilitating embodiment in each member. For this to happen, the members of the Council must know well the documents that govern the OCDS and let themselves be guided by them.

5. As an immediate authority, the Council serves as a support for the community's good; it must stand out *by its great esteem for the charism of the Teresian Carmel* and a *fraternal relationship* with the friars and nuns and the other members of the Teresian Carmel family. Its role, therefore, is to mediate between the Order and the members of the community, to which the Council lends a humble service (cf. CC 24d). To this end, they must cherish a love of the truths of Sacred Scripture, docility and submission to the teachings of the Magisterium of the Church and Order, avoiding radicalism and strange, fanatical or anachronistic conceptions about the Church or the Order (See Ratio 67). The community must not close in on itself, but feel itself in communion with other communities, since we are all branches of the one vine (cf. Jn 15:5-6).

To carry out this service, the members of the Council must look to Jesus, who came to serve and give his life for others (cf. Mk 10:43-45). This leads authority to be respectful towards the community, understanding it as a gift from above that must be guarded (cf. Benedict XVI *Caritas in Veritate*, 34) and as a place where the Risen One is present (GE 142; cfr. VC 42). It must seek the community's good and lead it to human, Christian and Carmelite growth, with the attitudes of the Good Shepherd (Jn 10:11-15), until all arrive at the final goal of Faith: eternal life (cf. 2 Cor 5:1).

6. Another very important quality in the exercise of the Council's service is the ability to live and promote *confident dialogue* at different levels: within the Council itself between the Council and the other members of the community; it must also foster dialogue with other communities, with the Provincial Council and other realities of the Order.

In the practical exercise of dialogue, on the one hand, all must have *the patience of listening*. It must be understood as "an encounter in freedom, which requires humility, patience, willingness to understand, and an effort to respond in new ways. Listening transforms the heart of those who do it, especially when it takes place with an inner disposition of harmony and docility to the Spirit" (Final Document of the 2018 Synod: 6). On the other hand, it also implies having *the courage to speak*. This must be done with frankness and openly, and refer to what one has prayed about and weighed up, in the silence of a heart at peace and in the light of God, having therefore perceived that it is in conformity with the truths of Scripture and the

Magisterium. So, it is not a question here of tenaciously defending one's ideas, but of seeking the truth together with others in humility.

It is also a dialogue respectful of others and of the diversity of opinions and experiences in the community. Only so can we develop, through dialogue, the acceptance of what is different from me in a unity that generates life, making possible a "communion amid disagreement, but this can only be achieved by those great persons who are willing to go beyond the surface of the conflict and to see others in their deepest dignity" (EG 228; cf. 226-230). In this form of dialogue, possible and eventual conflicts in the community that could fragment it (cf. *Way of Perfection* 7:10), are harmonized by the unity of the spirit.

7. In order that what has been said so far can come about, *humility* is essential. The Apostle Paul proposes in the letter to the Philippians (Phil 2:2-11) the example of the self-emptying (kenosis) of Christ. It implies first of all an attitude of service and considering others superior to oneself. All are called to be of the same mind, having the same love, being in full accord and of one mind.

Humility also requires having our eyes fixed on God, the true centre of each and every one, not considering oneself the centre of the world and of oneself. Thanks to this, the humble person recognizes that he or she needs others, to which our Holy Father John of the Cross has already drawn our attention: "[Humble people] do not dare deal with God independently, nor can they be completely satisfied without human counsel and direction. God wants this He draws near those who come together in an endeavour to know it [truth]" (St. John of the Cross, 2 *Ascent* 22:11). Only with humility and detachment from self can we overcome the temptations of factions, rivalries and vainglory in the community (cf. *Way of Perfection* 10:3-4).

8. Finally, so that there may be a co-responsible exercise of authority by the Council and all the members, there is a need for *training in communion* which helps to move from the selfish "I" of the old person to the "we" of the new person (cf. NMI 43; ITC 107-109). In the first place comes the common good, sought by all. Everyone must feel in search of the fulfillment of God's will, following in the footsteps of Jesus under the guidance of the Holy Spirit, at the service of the mission.

Since for each community attention is required to be given to the new generations, who appreciate a readiness and a capacity for working collaboratively, it should be remembered that "the skill required for working collaboratively involves cultivating specific relational virtues: the discipline of listening and the capacity to give the other person space, readiness to forgive and willingness to 'put oneself on the line', according to a genuine spirituality of communion" (*Final Document of 2018 Synod*: 103).

In this formation, the celebration of the Eucharist plays a primordial role. In fact, in the Eucharist that "source and paradigm of the spirituality of communion", there are the principles of communion among all, in the equal dignity received in Baptism.

Constituted into a Eucharistic assembly, with the invocation of the Most Holy Trinity and participating in the sacred action in a full, conscious, pious and active form (cf. SC 48.14), the members of the community, through their various gifts and charisms received from the Father of all, express and renew the commitment of each one to unity, promoted by the Holy Spirit. Thus, recognizing their own fragility and personal sins (*penitential act*), they are called to live

and to choose again the path of communion, by implementing reconciliation with God and with their brothers and sisters. Then, the common listening to the word of God recalls that learning to listen to God takes first place and leads to listening to others. The offering of gifts reminds us of the union with Christ in our daily activities and works which, lived in the faith and spirit of Christ in the liturgy, are now united to His unique offering (cf. SC 61). Communion with the body and blood of Christ, received by those present, in turn realizes the unity of the members in the one bread, creating and favouring communion with God and with the brothers and sisters. Finally, nourished by the Eucharist, they are led to mission, to be a community of faith “outgoing” towards all (cf. ITC 109). Thus, in the Eucharist “source and apex of the whole Christian Life” (LG 11), is formed and nourished in the members of the community a reciprocal affection that leads to walking together, which is a “constitutive dimension of the Church” (ITC 1.5.42.57,94,120).

9. My dear Secular Order members, what I have told you may seem an ideal difficult to achieve, in the face of the countless challenges you encounter in carrying out this task. Nevertheless, the important thing is to take steps in this direction, to start and to follow the processes of growth (cf. EG 222-225). I am sure that we are in an authentic time of grace. It is *now and here* that we are called to be prophetic, sensing in faith the way to go together, thus corresponding to God’s will. “God, however, does not make men holy and save them merely as individuals, without bond or link between one another. Rather has it pleased Him to bring men together as one people, a people which acknowledges Him in truth and serves Him in holiness” (LG 9; cfr. GS 32; GE 6). For this reason, we have the guarantee of the grace received in the consecration of Baptism and Confirmation. More concretely, with the call to the Teresian Carmel we have the guarantee of divine support in continuing to walk the path of holiness in community, with the virtues of “endurance, patience and meekness, joy and sense of humour, daring and fervour” (cf. GE 110-157). St. John of the Cross confirms this to us: “The Lord has always revealed to mortals the treasures of his wisdom and his spirit, but now that the face of evil bares itself more and more, so does the Lord bare his treasures more” (*Sayings* 1).

Dear brothers and sisters: May the Holy Spirit continue to shed light on your path. Following the example of Jesus and in fidelity to the Teresian charism, promote always the witness of the kingdom in the midst of the world and thus collaborate in the mission of the Church and the Order.

In thanking you for your fraternal affection so often shown, I offer dear and brotherly greeting to you, your families and communities. I wish you a fruitful Lenten time and a holy Easter of the Resurrection: Let it be the inexhaustible source of hope and joy for each one of you.

Imploring upon you the Lord’s blessing, I beg Our Lady of Mt. Carmel to guard you and gather you around her Son.

Faternally,

Fr. Saverio Cannistrà OCD
Superior General

Rome, 6th March 2019
Ash Wednesday

Appendix D: Fr. Gen. Saverio Cannistrà's May 24, 2021, Letter to the OCDS

SUPERIOR GENERAL OF DISCALCED CARMELITES

Corso d'Italia, 38

00198 Roma – Italia

*...Straining ahead for what is still to come, we are
racing for the future,
for the prize to which God calls us upwards
to receive in Christ Jesus
(Phil 3:13-14)*

My Dear Brothers and Sisters of the Secular Order,

We have come to the conclusion of the sexennium 2015-2021, six years marked by joys, tribulations and so much hope. Now, on the threshold of our General Chapter, I want to thank the Lord for everything He has allowed us to experience and achieve, but also to thank each of you as you supported us with your prayer and solidarity. At the same time, I would like this letter to express my prayerful and affectionate closeness to all those who are sick and who have lost family members and friends during the pandemic or are suffering from situations caused by it. May the Lord strengthen and support you with His grace and faithful love.

1. In my letters to you during the past six years I have sought to underline various aspects of your OCDS life that I consider essential. I recall some of them here to keep our memories alive and avoid a characteristic flaw of our times, which Pope Francis refers to as “a growing loss of the sense of history, which leads to even further breakup” (cf. *Fratelli tutti* [=FT] 13-14).

The OCDS letter in 2016 presented a report of the suggestions sent from the various Provinces as a contribution to the reflections of the 2015 General Chapter. They referred to the possibility of establishing an international Council of OCDS, further development in formation in the Teresian Carmelite charism and an improvement in communications between OCDS and the Friars and Nuns. These are still valid suggestions and continue as on-going projects for the future. In 2017, we reflected on the manifold possible expressions of the mission of Secular Carmelites. Mission is an essential factor in the OCDS vocation and is first and foremost the right and duty of every baptized and confirmed Christian. We note the necessity of a greater and more active collaboration of our secular members with the Friars and Nuns of the Order, where this is possible. According to his/her personal vocation, everyone is called to promote the spiritual life as friendship with the Lord and this is manifested in specific works for the good of others. Then in 2018, I dealt with some particular aspects of the identity of OCDS members. I made specific reference to the necessity of prayer and silence, being aware of the Lord dwelling within us (cf. *The Way of Perfection* 28, 8-10) and overcoming the temptation of being satisfied with a sterile superficiality, exposed to mundane conditioning. The following year I insisted on the role of local and provincial Councils. It is in these that the vitality of the community/province becomes evident, in regard to fraternal care, formation and missionary witness. Insofar as I have been able to ascertain during this period of the pandemic, many provincial Councils have organised congresses and meetings on formation and prayer online.

Despite their limitations, these have proved invaluable in supporting and accompanying the members of their communities.

Lastly, in 2020 I recalled the 50th anniversary of the Doctorate of our Holy Mother Teresa and the 20th anniversary of the II international Congress of OCDS, referring to certain achievements but also pointing out the challenges that had still to be confronted in various provinces. This was a year marked by the spread of the Covid 19 pandemic. The upsets we have had and are still going through have allowed us to experience our extreme impotence and fragility. Let us grasp it as a precious opportunity of learning to adopt an attitude of humble and trusting hope in God's infinite love, certain that "His mercy is everlasting" (Psalm 136).

2. With regard to the general situation of the Secular Order, I report the following statistics (updated to 6 May 2021). The total number of members with promises (temporary and definitive) is 28,824, present in 92 countries. There are 775 canonically erected communities with an additional 341 groups or communities of formation. 97 communities have been canonically erected during the past six years. These are very significant data, not only registering the numerical increase of OCDS, but even more importantly, underlining its vitality and effectiveness.

3. I also wish to refer to some worries and perplexities regarding certain attitudes that are surfacing here and there among some members of OCDS. Particularly I refer to the emergence of polarizations and radicalizations. It appears that some characteristics of today's world have begun to penetrate our ranks. Pope Francis called them particularisms, populisms and fundamentalisms. If these are fostered "ancient conflicts thought long buried break out anew... myopic, extremist, resentful and aggressive..." (FT 11). They are signs of selfish individualism, masked as zeal for some forms of apparent orthodoxy. In practice, these attitudes manifest themselves as support for polemical personalities in the Church, not fully in agreement with the Second Vatican Council, remaining doggedly attached to a Church that is definitively outdated. Unfortunately, such attitudes and conduct create conflict and useless divisions and become a counter-witness to the expressed will of Jesus that His disciples be united in love and truth (cf. John 15:17; 17:23). St. Teresa has already warned us of the risks of "indiscreet zeal" (1 *Mansions* 2,17) that damage communities so much and dampen and diminish charity. Today we are called to build communities that demonstrate the Good Samaritan's concern for the world, shown by gratuitousness (cf. FT 139), by tenderness (cf. FT 194) and by the art of encounter (cf. FT 215). True fraternal relationships bear the seal of respect and of behavioural traits such as "approaching, speaking, listening, looking at, coming to know and understand one another, and to find common ground: all these things are summed up in the one word 'dialogue'" (FT 198).

Another problem can arise from the harmful use of social networks if they diffuse disrespectful and false news about the Magisterium (Church and Bishops), or slander the good name of others. I ask myself if anyone behaving in this way can really be part of our Order and a true child of our Holy Mother Teresa. We must make use of these modern facilities with prudence and in an effort to build bridges. If there is need of discussion, let us do so in a search for truth, without ever being lacking in respect or love. We should be constantly mindful of St. Paul's lesson: "Do all you can to preserve the unity of the Spirit by the peace that binds you together" (Ep 4:3).

A further worry would be the tendency in some circumscriptions to revert to clericalism or passive submission of lay persons in the ranks of OCDS. The relationship that we want to establish between OCDS and our Religious is one of collaboration and mutual respect of their legitimate autonomies. With regard to the Secular Order, you must remember that you have autonomy for your government, for your formation and for the organization of your activities, in accordance with the norms approved by the competent authority. We must not take backward steps in time. This would mean not being attentive to what the Spirit is asking of us today. We are called to journey together (*syn-odos*) as pilgrim people of God in history, recognizing that we complement each other in our vocation in the service of the same charism. Your lay vocation implies a dedication to building up the Kingdom in the midst of the world (cf. LG 31-32; ChL. 15).

4. In conclusion, I would like to leave you with some thoughts for reflection on how you might persevere with dynamic fidelity on your journey in collaboration with the other branches of the Order and the Teresian Carmelite family. All of us, in fact, are called “to be mission” in a world that keeps changing and suffering, while garnering our strength from our relationship of friendship with the Lord. This will be possible if you confront your troubles and difficulties from within, finding light in that faith that never forgets God’s fidelity throughout the course of history. In this sense, “the believer is fundamentally one who remembers” (EG 13). We are immersed in a digital ambience where our inner selves are at constant risk of being inundated with waves of information and images that do not concern us and that only leave us with superficialities. Hence, our urgent need of rediscovering those spiritual dispositions outlined in our Rule. This is especially true in regard to meditation on the Word of God instructing us to safeguard our memory and keep our hope alive, constantly renewing our covenant with God in Christ.

This was the example set by Sts. Teresa of Jesus and John of the Cross during their lifetimes: although immersed in the current problems of the Church and of the Order, their hearts were always fixed on their Trinitarian fatherland. Like them, in a humble and trusting relationship with the Lord, we must seek to find the inspiration and strength to work in the service of the Church and our Order. Again, like them, we must journey and work together. Teresa sought allies among religious and lay people who would assist her progress in making foundations according to the charism she had received. In this way, it is essential that every member of our Order feels co-responsible for that area of the Church to which he/she belongs, as well as building up their own Carmelite community with active and mature involvement.

All this calls for an openness to and docile acceptance of formation. We must be trained especially with a view to achieving a theological perspective on life, in a concrete faith that is open to hope and to “expressing itself in love” (Gal 5:6), a faith like that of Mary and Joseph, centred on the Word of God becoming incarnate in our daily necessities. An integral part of such formation is an assimilation of the writings of our Saints from the point of view of a lay vocation.

May the light shining from the Risen Crucified illumine your lives and hearts so that you can live in its fullness your vocation and your mission in the Church and world of today. May you be

Appendix D

sustained especially by the intercession of Mary, Mother of the Church and by St. Joseph her spouse, Patron of the whole Church and the “most generous Protector” of our Order.

May the Lord bless and protect your families and your communities!

Faternally in Carmel,

Fr. Saverio Cannistrà, OCD

Superior General

Rome, May 24, 2021 - Feast of the Blessed Virgin Mary, Mother of the Church

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