

# Formation Handbook

Western America  
Capuchin Province of  
**Our Lady of Angels**

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(Supplements consist of helpful material from the various formation directors. This material is unofficial and, therefore, requires no approval by the Provincial Council for its addition or removal. Each supplement is paginated separately or not at all).

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## I. Overview of the Formation Process

### A. Preliminary Remarks

#### 1. Introduction

Realizing the need to set down certain guidelines and goals for the work of formation, we, the ministers of formation for the Province of Western America (under the patronage of Our Lady of Angels), propose the following as a handbook for initial formation in our province. What we herein propose are general guidelines and policies, which will be open to updating and change.

#### 2. Purpose

Formation is the development of the brothers and of fraternities in such a way that our life may daily more conform to the holy Gospel and the Capuchin Franciscan spirit according to the needs of the times and places. Integral formation concerns the whole person, especially in its psychological, religious, and cultural elements, as well as in professional and technical elements. All formation is first of all the work of the Holy Spirit, and demands the active cooperation of those being formed. Also, fraternal life in itself is always and everywhere a fundamental requirement of the formation process.

Although all the brothers have a formation role, it is necessary that some brothers be appointed to have greater responsibility for this duty. Besides the Provincial Minister and Guardians, there are certain qualified personnel who undertake this particular duty in the name of the fraternity. Those brothers who work in formation as their ministry should work as a team, coordinating their efforts and following consistent norms throughout the whole period of initial formation. They should receive the assistance of the entire provincial fraternity in fulfilling their role.

#### 3. Sources

We are guided in the work of formation by the Gospel of Jesus Christ, the life and teachings of St. Francis, the traditions of the Franciscan Order and the Capuchin Reform, and the principles proposed by the Church.

In particular, we follow the principles outlined in the Rule of the Friars Minor, our own constitutions, the documents of the Church on Religious Life and on Priestly Formation. We also follow the documents issued by Plenary Councils of the Order, especially PCO Four, "Formation for Our Way of Life" (Rome, 1984). These sources should be read constantly and reflected on as we develop and implement formation policies.

## B. Stages of Formation

The formation process for the Province of Western America includes the following stages:

1. Vocation Promotion and Development
2. Aspirancy

Aspirancy is a residential program for young men who are interested in a Capuchin vocation but for some good reason are not yet ready to enter the Provincial Postulancy Program.

3. Provincial Postulancy Program

During this time the postulants live with the friars at a house of formation and thus come to know the ideals and realities of Capuchin Franciscan Life, especially as it is realized in the Province of Western America. The fraternity on its part comes to know the candidates better and is able to help them discern their vocation.

4. Interprovincial Postulancy Program

After the completion of the Provincial Postulancy Program, the postulants of the Province of Western America participate in the Interprovincial Postulancy Program sponsored by NAPCC. Guidelines for the Interprovincial Postulancy Program can be found in the IPP manual approved by NAPCC.

The Interprovincial Postulancy Program (IPP) is a highly focused, two month, foundational experience of establishing an interprovincial fraternity living a common Capuchin life. It is designed for those (a) who have completed their formal period of Postulancy within any participating NAPCC (*North American and Pacific Capuchin Conference*) Province and (b) who have already been formally accepted to participate in the upcoming NAPCC Intercontinental Novitiate.

5. Interprovincial Novitiate

Novitiate is a period of more intense initiation and a deeper experience of Capuchin Franciscan life in its fundamental demands, and it presupposes a free and mature choice of the religious life. It is a time of more intense immersion in the various

aspects of our life, especially prayer, in order to build a firm foundation for the vocation of a friar minor.

The Province of Western America participates in the Interprovincial Novitiate sponsored by the NAPCC. Guidelines for the Interprovincial Novitiate can be found in its own manual approved by NAPCC.

#### 6. Post-Novitiate Formation

Post-novitiate formation is a period in which the brothers progress toward further maturity and prepare themselves for the definitive choice of our Gospel life through perpetual profession. This formation should always be adapted to the way of life and gradual maturing of the person involved.

#### 7. Post-Novitiate Studies

Post-novitiate studies take place concurrently with post-novitiate formation. Since each brother is trained according to his talents for the various tasks that have to be performed, special studies and training are encouraged. While the same religious formation is given to all the brothers, those who are called to sacred orders must also be trained according to the norms laid down by the Church and with consideration of the charism of our fraternity.

### C. Personnel

The Provincial Minister appoints all positions of formation, including members of the Admissions Council and Formation Council with the exception of the Student Representative, who is a non-voting member.

#### 1. Director of Vocations:

This friar has the responsibility of coordinating vocation contacts, conducting interviews, and encouraging those deemed fit to continue with the admissions process. In this work, however, he is aided by all the brothers of the province, especially those who work in various other stages of formation.

#### 2. Director of Aspirants

This friar works with those young interested in our life who are directed to this stage of preparation.

#### 3. Director of Postulants

This friar oversees the Postulants' formation, and proposes them for the novitiate (c.f., the section on Postulancy for a detailed description).

#### 4. Novitiate Liaison (c.f., Provincial Director of Initial Formation)

#### 5. Director of Post-Novitiate Formation

The Director of Post-Novitiate Formation oversees the brothers in their preparation for solemn profession as well as their post-novitiate studies.

#### 6. Assistants

Assistants are those friars who are specifically appointed to aid any of the above in their duties. An emphasis is given to team ministry as an expression of fraternity and mutual support, and as an aid in avoiding stress factors often encountered in formation ministry. Particular duties of these assistants are arranged between the individuals involved.

#### 7. Local Formators / Mentors

Local Formators are those friars who supervise the friars in formation during their summer or residency assignments. They work closely with the Director of Post-Novitiate Formation.

Mentors are those friars who assist and supervise student friars near the completion of their training for ministry or other professions. For example, a pastor may be asked to be a mentor for a newly ordained deacon. They work closely with the Director of Post-Novitiate Formation and Prefect of Studies.

#### 8. Prefect of Studies

This friar oversees the academic and professional formation of the friars in post-novitiate formation and studies. He may also be involved with programs for the postulants, etc. In regard to sacred orders, he sees that all canonical requirements for ordination are met.

#### 9. Provincial Director of Initial Formation

The Provincial Director of Initial Formation (PDIF) performs several important tasks:

- He coordinates the overall formation process of the province as the one who convokes and chairs the Formation Council and is the regular liaison between it and the Provincial Council.
- He convokes the Admissions Council.

- He acts as the novitiate liaison by maintaining contact with the novices of the Province Of Western America and the Master of Novices regarding the novices' progress and passes along all necessary information to the Provincial Minister. He visits the novices on different occasions during their program. Midway through the novitiate year, he, in consultation with the Master of Novices and the Prefect of Studies, contacts the novices to help them in the discernment of their vocational goals. (c.f section on Post-Novitiate Studies). He also assists the novices in the application process to schools for their studies in Post-Novitiate Formation and in their documentation for first profession of vows.
- He attends meetings with the other Provincial Directors of Initial Formation of NAPCC. If he is elected as chair, he also attends the Oversight Committee of Initial Formation (see NAPCC Inter-Novitiate Manual).

#### 10. Appointed Formation Council or Admission Council Members

These are friars, whose ministry is outside provincial formation work. They are appointed to sit on the Formation Council or the Admissions Council (or both councils). The term of appointment is for two years.

#### 11. Student Representative

He is elected by the other friars in post-novitiate formation or professional studies to be a non-voting representative at the Formation Council. The friar in post-novitiate studies may be either temporarily professed or perpetually professed. The representative serves a one-year term and may be re-elected to an additional, consecutive term.

#### 12. Guardians of Formation Communities

Guardians, as the ordinary animators and coordinators of the formation process of the brothers, play a vital role. No one is made guardian of a formation community without willingness to understand and take part in the formation process.

#### 13. Formation Communities

Not all the brothers in formation houses will be working in a specific formation role, and this is desirable so that those in formation have a better experience of fraternity. However, it is essential that anyone living in a formation community understand the process and be willing to cooperate as much as possible with the goals of formation. Formation communities must be constituted with the greatest care, and anyone who does not want to live in one is not to be so assigned.

## D. Structures

### 1. The Formation Council

The Formation Council meets to discuss and recommend general formation policy. It works to make a consistent formation program and helps the directors of different levels to collaborate together. It works to maintain a consistent evaluative process of candidates and to give a clear understanding to those who enter this ministry its policies, goals, and implementation.

#### a) Composition

The Formation Council is composed of:

- Provincial Director of Initial Formation (chair)
- Director of Vocations
- Director of Aspirants
- Director of Postulants
- Director of Post-Novitiate Formation
- Prefect of Studies
- Appointed friars
- Assistants \*
- Student Representative \*\*



\* Assistants are non-voting members of the Formation Council. However, if the member of the council whom they assist cannot be present, then they sit on the council as a full member, with voice and vote.

\*\* The Student Representative is a non-voting member of the Formation Council.

#### b) Meetings

The PDIF convokes and chairs the Formation Council. He seeks input in drawing up an agenda, which will be distributed to the friars before the meeting. One friar will act as secretary, and the minutes of each meeting will be sent to the Provincial Minister and a report to each of the friaries. The Formation Council normally meets at least twice yearly.

## 2. The Admissions Council

According to our Constitutions, it is the responsibility of the Provincial Minister to admit candidates to the Postulancy, Novitiate, and profession. However, they also stipulate that he should consult other brothers who have a special competence in this matter [C. 19:1-3]. The purpose of the Admissions Council is to advise him regarding these candidates to the Order.

#### a) Composition

The Council is composed of:

- Provincial Director of Initial Formation (chair)
- Director of Vocations
- Director of Aspirants
- Director of Postulants
- Director of Post-Novitiate Formation
- Prefect of Studies
- Appointed friars

#### b) Procedure

The PDIF, in consultation with the Director of Vocations who has candidates for admission to postulancy and/or with the Director of Postulancy who has postulants for admission to the novitiate, convokes the Admissions Council.

The council begins with the Director of Vocations proposing the candidates—one by one—for recommendation of admission to postulancy. After each candidate has been considered, he conducts a vote. Afterwards, Director of Vocations writes a

report with a summary of the discussion(s) and the results of the vote(s) and sends it as soon as possible to the Provincial Minister.

Once the candidates for admission to postulancy have been examined, the Director of Postulancy proposes the postulants—one by one—for recommendation of admission to the novitiate. After each candidate has been considered, he conducts a vote. Afterwards, Director of Vocations writes a report with a summary of the discussion(s) and the results of the vote(s) and sends it as soon as possible to the Provincial Minister.

The candidates and/or postulants are informed as soon as possible by their respective directors when the Provincial Minister or the Provincial Council has made a decision.

Each director consults his section of the handbook for other procedures in the evaluation and documentation of candidates.

The Admissions Council also may act as a forum for discussing suitability or other sensitive issues regarding the friars in formation. Former formation directors or other friars who have had a formation relationship with the friars in formation in question may be called to address the Council. If appropriate, the Director of Post-Novitiate Formation communicates the deliberations to the Provincial Minister.

The members of the Admissions Council regularly consult each other regarding the individuals entrusted to them in the formation process so that they may be informed when the council meets.

## II. Admission to Our Life

### A. Vocation and Promotion

The Director of Vocations coordinates efforts to introduce men to our life and help them discern God's calling. This is considered full-time ministry.

It is the responsibility of all the friars, however, to promote and nurture vocations. They shall aid interested men, whom they consider promising, in contacting the Director of Vocations and beginning the process of entering our life.

### B. Criteria for Admission to our life

- As criteria for admission to our life we look to those values and requirements outlined in our Constitutions [C.17], as well as relevant sections of Canon Law.
- In admitting candidates, the guidelines established by Praesidium are followed. A candidate who has committed an act of sexual abuse of a minor or who has had psychological or life events that would make him a high risk of such behavior is unacceptable for admittance to the order.
- No one is admitted who gives evidence of problems that require long-term or intensive counseling or other psychological help.
- Candidates are American citizens or have legal immigration status.
- Generally, candidates are free of debt before entering postulancy. However, the Provincial Council can approve on a case by case basis the repayment of a candidate's student loan.
- If someone previously has been in a seminary or a religious order, the Director of Vocations seeks a recommendation from that seminary or religious order before he is admitted into the order.
- Candidates who had been in formation in the province but left the Order may request readmission to it. The Director of Vocations follows the same procedures for admission as other candidates.
- In considering admission to our province, the friars shall keep in mind cultural differences and heritage of the candidates. It is their duty to be informed about pertinent cultural aspects.

### C. Process of Admission to Our Life

#### 1. Initial Contact and Interview

The Director of Vocations (or another delegated friar) conducts an interview with those interested in Capuchin life. This interview covers such areas as:

Family background, social life, work experience, educational level, religious training, involvement with the Church, self-image, prayer life, relationships, sexuality, discernment of initial call to religious life, especially Capuchin Franciscan life and values, and expectations.

The Director of Vocations carefully screens interested contacts for sexual abuse of minors. Counselors who perform psychological evaluations of candidates (below) may assist him in this task.

## 2. Further Contacts

Those interested and suitable are encouraged to look further into our life by means of official vocation retreats, informal visits to the friaries, etc. Visits to various formation houses are highly recommended.

Prospective candidates are encouraged to talk to all or most of the members of the Admissions Council.

## 3. Application

The Director of Vocations directs those whom he feels have a possible vocation to our life to undergo the application process to the province. For those who choose to apply, he obtains from/on each of them the following:

- a completed standard application form along with a recent photo.
- an autobiography, describing his life and his reason for applying to the Order.
- complete medical, dental, and vision reports.
- five letters of recommendation. The letters could cover the person's spirituality, intellectual capacity, physical capacity, ability to make a commitment, and ability to get along with others. At least three of the letters are to be from professional persons, such as the candidate's spiritual director, pastor, employer, etc. Two of the letters may be from a personal relationship, such as a close friend or co-worker.

The Director of Vocations makes a record and puts it into the candidate's file: (1) that five letters were received, (2) the names of the persons who wrote the letters of recommendation, and (3) the dates on which they were written.

- a recent copy, six months or less, of his baptismal certificate, and any other relevant documentation, i.e., marriage record of parents, transcripts from schools, military discharge papers, etc.
- a report on criminal and civil records.
- a report that identifies which friars interviewed the applicant, including those who sit on the Admissions Council.

- a psychological evaluation regarding his fitness to enter the Order. The Director of Vocations arranges for the evaluation of the candidate from a professional who is not in the order. Its results are highly confidential.

If the Director of Vocations judges that a candidate's application should not be submitted to the Admissions Council due to concerns raised in the psychological evaluation, he informs the Provincial Minister, who may at that time decline the application. The closed file is annotated as below.

The Director of Vocations is responsible for gathering all the above-mentioned documentation and distributing copies to the members of the Admissions Council in time for consideration before their meeting.

#### 4. The Admissions Council

During the Admissions Council, the Director of Vocations proposes the candidates—one by one—for recommendation of admission to postulancy. After each candidate has been considered, he conducts a vote.

When the Director of Vocations has finished proposing candidates, he collects all copies of the psychological evaluations and the letters of recommendation (except for the copy held by the Provincial Minister) and destroys them after the council meeting.

The Director of Vocations forwards the names of those the Council recommends as soon as possible to the Provincial Minister and his Provincial Council.

Once the Provincial Minister has made his decision regarding the candidates, he informs the results to the Director of Vocations; if candidates have been accepted into postulancy, he also informs the Director of Postulants.

The Director of Vocations informs the candidates as soon as possible of the decision of the Provincial Minister.

The Director of Postulants writes a letter to the future postulants advising them of the starting date of the program and other pertinent information.

## 5. Documentation

When a candidate is approved for admission to postulancy, the Provincial Minister keeps a copy of the psychological evaluation for one year. He is the only brother authorized to read it and share the information, if necessary. After one year from admission, he destroys the evaluation. No file labeled “psychological evaluation” is to be kept permanently.

When the Provincial Minister declines a candidate’s application, either before or after the Admissions Council has met, the Director of Vocations destroys the psychological evaluation and the letters of recommendation and annotates the closed file stating, “The Provincial Minister does not believe that this applicant has a vocation to our Order” and then signs and dates the annotation.

If a candidate inquires about issues revealed in the psychological evaluation, he is referred to the psychologist who conducted the exam and who is the only person capable of discussing those issues in a professional manner.

### III. Aspirancy

#### A. Purpose and Goals

*“To foster vocations it is helpful to offer young people some way of participating in our fraternal life.” [C. 16:3]*

Aspirancy is a residential program for young men who are interested in a Capuchin vocation but for some good reason are not yet ready to enter postulancy. The reasons for this include, but are not limited to, age, debt, personal growth issues, desire to complete college studies, etc. The main idea of the program is to give such men a chance to experience religious life and discern their vocation in a supportive atmosphere.

While not a formation program as such, Aspirancy aids the participants in growth in spiritual life and Christian values as well as introducing them to our Capuchin Franciscan way of life. This is accomplished through conferences with the Director, spiritual direction, special retreats, and daily interaction with the community. The aspirants are invited to take part in prayer and fraternity as is appropriate.

The program does not have a set length and may conceivably extend for a number of years. However, anyone who clearly does not seem to have a religious vocation is not encouraged to stay beyond a reasonable time.

#### B. Admission to the Program

Candidates for this program are first discerned by the Vocation Director. If he feels someone is suitable for the program, he consults the Director and other friars who, if possible, meet the candidate.

Candidates to the program are proposed by the Vocation Director and Program Director and are admitted with the permission of the Provincial Minister and the Guardian (if different from the Director).

While we do not require psychological or medical reports, five letters of reference attesting to their good character and suitability for common life that would give us an insight into the person's background on issues such as spirituality, intellectual ability, ability to make a commitment, physical capacity, and ability to get along with others. The letters should be especially from the candidate's spiritual director, pastor, close friend or co-worker. And at least three of them should be from a professional person. We should keep a record that five letters were received and the names of the persons who wrote them and the dates on which they were written.

Candidates are to be informed of the rent and other obligations they retain.

They should be informed that they might be asked to leave the friary at any time (they will be given reasonable notice unless conditions necessitate immediacy).

#### C. Roles

The Director of Aspirants will be in charge of the program.

He shall make sure the aspirants are given help in their discernment which may include individual conferences, classes, days of recollection, retreats and other appropriate activities. He may also organize apostolic activities to give the aspirants experience in ministry, especially among the poor and powerless, as an important element of our Capuchin Franciscan life. He shall also give the aspirants a chance to meet other friars in the Province.

The Director shall consult with the local community about the aspirants and take their comments seriously in considering their continuing in the program, being directed toward postulancy, etc.

The community for its part will aid the Director in his ministry and make suggestions as appropriate.

#### D. The Life of the Aspirants

The aspirants are expected to have an active spiritual life, living Christian values nourished by the Eucharist and other sacraments.

They are asked to have a spiritual director (other than the Director of Aspirants).

They will be invited to participate in all aspects of fraternal life as judged appropriate by the Director. Primary among these are community prayer, meals, household duties, etc.



The aspirants will normally be involved either in full time studies or in some other sort of gainful activity.

They are free to visit home, especially at the holidays, and make other trips. They should inform the Director of their schedule.

Normally the program will occur during the school year (i.e., August to May).

The aspirants will pay room and board at a rate set by the province. They are also responsible for any tuition, insurance, medical, phone, transportation, personal recreation and any other incidental costs.

Candidates will be accepted into the program while carrying student loan or other debts, with the understanding that they will be working to discharge those debts.

Admission to postulancy for those with debts will follow the guidelines set out in that section of this handbook.

#### E. Admission to Postulancy

Those aspirants who feel called to pursue a Capuchin Franciscan vocation will be put in contact with the Vocation Director and will follow the regular application procedure for the postulancy.

## IV. Provincial Postulancy Program

### A. Introduction

#### 1. Purpose

*“Initial formation into our life requires that candidates, under the guidance of formation personnel, gain the necessary experience and knowledge and gradually enter into the Franciscan Gospel way of life.” [C. 25:1]*

Postulancy is the initial stage of formation for candidates who have been accepted by the Provincial Minister for entrance into the Capuchin Franciscan Order. It begins when a postulant starts his residency at the postulancy house and ends when he either leaves the order or is formally admitted to the order as a novice at the rite of investiture.

The purpose of postulancy is to give postulants an experience of Capuchin Franciscan life by living, praying, working, and ministering with friars as they continue to discern their religious vocation. During this time the postulants are introduced to the ideals and realities of Capuchin Franciscan life, especially as it is realized in the Province of Western America. They continue their conversion by learning to love the brothers as Christ has loved them (c.f., John 16:12), by prayer, by penance, and by other aspects of the Capuchin Franciscan charism. The formation directors and other friars for their part guide the postulants in this new experience and assist them in their discernment process (c.f., C. 28:2).

#### 2. Guidelines for Postulancy

The program helps postulants to continually grow in their adult faith development: knowledge of faith, prayer, liturgical life, moral formation, communal life, and missionary spirit.

##### a. Prayer and Spiritual Life

The spiritual life takes on new importance in postulancy. The program helps the postulants to see spiritual life in relationship to God, to the community, and to all people. The beginnings of integration of prayer with the rest of life are sought. To this end, regular prayer, both communal and private, is encouraged. The postulants participate in the Divine Office, in the daily celebration of the Eucharist, and in the reception of other sacraments of the Church. They make at least one retreat and have days of recollection. They are also instructed in methods of prayer and are provided with books and other aids on the practice of prayer. They are also encouraged to develop their private prayer life.

##### b. Fraternal Life

Since our way of life is a Gospel Brotherhood, fraternity becomes one of the chief goals of postulancy. Postulants are urged to grow in altruistic concern and genuine devotion to the brothers. This is accomplished by having them share in the community life of the house, especially by common prayer, meals, housework, recreation, and other responsibilities.

It is important that postulants get to know the province. They are encouraged to meet the friars by visiting other fraternities, especially those in the vicinity of the postulancy house. They are also encouraged to attend more important provincial gatherings.

c. Affective Life

The postulants are to develop all aspects of their lives, including emotional maturity, ability to relate to others, and the ability to integrate sexuality positively into their lives.

The postulants are to be certified in the child safety program for the Capuchin Order (and for the local diocese if they undertake a diocesan ministry), to undergo extended instruction on sexuality and celibacy, to study the provincial misconduct policy, and to have some instruction on cultural diversity.

Friendships with people both inside and outside the order are to be promoted in a manner that avoids the extremes of over-socialization or social isolation. The family is also recognized as an important part of the postulants' emotional growth and formation, and they are encouraged to visit their families during vacation.

d. Poverty and Ascetical Life

According to the Capuchin Franciscan Constitutions, "*The Church recognizes the importance of voluntary poverty, especially in religious, as a sign of the following of Christ and proposes Saint Francis as a prophetic image of evangelical poverty*" [C. 59:3]. "*A spirit of penance in an austere life*" is also to be promoted [C. 101:5].

The postulants and the brothers of the community are expected to restrain their desire for comfort and pleasure, to take up a frugal and simple way of life in clothing, food, dwellings, conditions of environment, etc., and to devote themselves to works of penance. While specific guidelines in the postulancy house are made year-to-year at local chapters, typical decisions of the past include having simple dinners on Wednesdays and Fridays when abstinence from meat is encouraged, periods of solitude within the friary, simplicity in manner of clothing, food, and other possessions, avoidance of electronic equipment (computers, iPods, cell phones, etc.), sharing of vehicles, use of mass transportation, etc.

e. Manual Labor and Apostolic Life

Everyone in the postulancy house, brothers and postulants, participates in the manual work of the fraternity.

Since apostolic labor is part of the Capuchin Franciscan charism, postulants are to have "*an initial experience of apostolic work*" [C. 28:2]. Such work is to be proportionate to the individual's maturity and capabilities; it is also preferable that they work together in some apostolate(s). The Director of Postulants or others supervise them and give them feedback.

The postulants are encouraged to develop a healthy sense of responsibility in their manual labor and apostolic work. They contribute to the financial wellbeing of the house by their involvement in remunerative projects.

f. Academic and Franciscan Life

*"The formation of postulants aims primarily at completing their catechesis in the faith and includes an introduction to liturgy, methods of prayer, and Franciscan instruction" [C. 28:2].*

The postulants undertake a program of catechetical instruction following the common curriculum established by the North American Pacific Capuchin Conference (NAPCC), adjusted by the circumstances of postulancy for the Province of Western America. A common curriculum was worked out so that all the novices at the collaborative novitiate would have a similar preparation for the novitiate. The catechetical courses for postulancy include: Liturgy, The Creed (Christian Revelation), Sacraments, Life in Christ (Morality), Christian Prayer, the Social Teachings of the Church, an Introduction to the Vatican II Documents (Ecclesiology), and an Introduction to Scripture.

Since the postulants are coming to the order to be part of a Franciscan community, they are to be acquainted with the life and spirit of St. Francis. Hence, the beginnings of Franciscan studies are pursued during postulancy, which include an introduction to the writings, biographies, and spirituality of Francis, the Capuchin reform, a brief Capuchin history, Capuchin saints, and the study of the Rule and Capuchin Constitutions.

Postulants may take formal academic classes at their own expense at an adult school or local college, with the approval of the Director. The classes are not to interfere with the other goals of postulancy.

Postulants who speak English as a second language and who are not fluent in writing and speaking skills will be put into an ESL program, which should be in place at the beginning of postulancy.

B. Program Components and Guidelines

1. Personnel

a. Director of Postulants

The Director of Postulants has the responsibility for directing the overall formation process of postulancy. For this reason, the postulants must first seek permissions from him.

Postulancy formation is the most directed stage of formation because candidates in their first year of the Order are unfamiliar with its customs, and, more significantly, often require a significant break from their family and from societal codes of behavior that hinder the values of religious life. For this reason, postulants are to take less initiative in making their own

decisions and to seek permission from the Director regarding many activities of daily life. If a postulant is unsure on a course of action, it is prudent that he ask first.

The Director has regular (monthly) conferences with the postulants in order to help them in developing their spiritual life and general growth.

The Director encourages other friars to be involved in the program as he sees appropriate.

If the Director is absent from the community, postulants are to see permissions from either the Guardian or Director of Post-Novitiate Formation (if postulancy takes place at the house of studies). Upon his return, he is to be apprised of the decisions made during his absence.

The Director of Postulants, the Guardian, and the Director of Post-Novitiate Formation will collaborate as much as possible in areas of formation for the common good of the community.

b. Guardian

Typically the Guardian is the spiritual animator of a community. He convokes and directs local chapters and establishes the parameters of community life, such as the schedule for prayers and meals.

c. Director of Post-Novitiate Formation

When Postulancy takes place at the house of formation, the postulants would interact with the Director of Post-Novitiate Formation. He is responsible for directing the overall formation process of the friars in initial formation and ministerial preparation; the friars under his direction must first seek permissions from him.

d. Other Capuchin Friars

The professed friars of the community or in the vicinity of the postulancy house can be of great assistance to the postulants in advising or helping them during their formation, and the postulants are free to seek their help.

When a professed friar becomes aware of a deficiency in a postulant that may require correction, in most circumstances it is preferable that the friar inform the Director of Postulants of his concern who then handles it with the postulant.

## 2. Postulancy Program Duration

The provincial postulancy program typically begins in mid-August or early September and ends in early May of the following year.

After the candidates have settled in, a simple reception ceremony is recommended. The Provincial Minister or Director of Postulants presents them with the Tau cross and other resources for learning religious life.

A simple closing ceremony is also recommended at the end of the provincial postulancy program.

## 3. Pertinent Information for the Postulants

After the candidates have been notified of their acceptance into postulancy, the Director of Postulants writes them a letter advising them of pertinent information about the program, such as the starting and ending dates of postulancy, where postulancy takes place, vacation periods, what to bring or not bring, personal expenses, and so forth.

At the start of postulancy, it is recommended that the Director of Postulants provide the postulants a weekly schedule so as to give them an overview of the weekly rhythm of the program (see Appendix 1); if possible, he also provides them a postulancy course schedule for the courses laid out in sections 2:c and 2:f above (see Appendix 2). It is also helpful to give them written guidelines on various policies/practices of the postulancy program that have not been included in the notification letter. Such policies/practices may include use of the telephone and internet, use of electronic equipment, ascetical practices, etc.

## 4. Spiritual Direction

Each postulant shall have a spiritual director. They may choose any qualified person as long as he is not a member of the Admissions Council. In order to assist the postulants in their search, the Director of Postulants provides them a list of qualified spiritual directors at the beginning of postulancy.

## 5. Work

Each postulant is expected to maintain the cleanliness of his bedroom, bathroom, and corridor of his apartment. If others live in the same apartment, he is to work out a regular cleaning schedule of the common areas with his apartment-mate(s).

Postulants are expected to clean up or pick up for themselves when using communal areas of the friary (refectory, kitchen, parlors, libraries, community room, etc.).

As part of their manual work in the community, the postulants will be assigned house chores, work projects, and remunerative projects during postulancy.

a. House chores

House chores are those routine tasks that are necessary to keep the friary or other community property clean or in good running order or to perform ordinary tasks of community life. Such tasks include cleaning the kitchen, community room, basement, foyers and stairs, chapel; maintaining the automobiles or computer equipment; and performing the duties of guest-master, sacristan, gardener, and librarian.

b. Work Projects

Work projects are special tasks of maintenance (either cleaning or repair) of the friary that are not routine. Such projects include: shampooing rugs, waxing floors, sealing the exterior fire door staircase, painting, organizing garage sales, etc.

c. Remunerative Projects

Remunerative projects are undertakings that are intended to raise funds to help support the financial needs of the house or some other charitable need. Such projects include: making crucifixes or rosaries for resale, offering cleaning services for a donation, etc.

d. Supervision and Use of Time

The postulants are supervised and encouraged to make use of their time well. Their work is to be oriented for the common good of the fraternity and the whole Church.

## 6. Cooking

It is customary at the postulancy house that the brothers cook for themselves. Each brother takes care of his own breakfast and lunch and takes turns in preparing the common dinner meal.

According to the constitutions, "*Poverty demands a frugal and simple way of life in ...food*" [C. 60:4]. Generally, tastier dinners are made on Sundays, feast-days, and holidays, and simpler ones on weekdays and especially on days of fasting and/or abstinence.

Postulants who are unfamiliar with cooking are urged to seek assistance from the other brothers with respect to menu planning, quantity suggestions, food purchasing, cooking recipes and tips, etc.

## 7. Recreation

The postulants are to have regular periods of recreation in their weekly schedule. Typically, they have a daily, short period of recreation and one extended period of recreation per week.

The postulants are expected to participate in scheduled periods of communal recreation (c.f. weekly schedule of the postulants) whenever possible. If for a good reason a postulant cannot do so, he notifies the Director of Postulants.

## 8. Vacations

Typically, postulants have about two weeks of vacation at Christmas, and about three weeks between the end of the provincial postulancy program and the start of the Interprovincial Postulancy Program. Additional vacation time may be arranged with the Postulant Director.

Postulants are encouraged to visit their families, travel, or to make good use of their vacation time prior to the start of the Interprovincial Postulancy Program. If a postulant has nowhere else to go during the interim vacation, he may arrange to stay at the friary or some other friary with the permission of the Postulant Director until IPP begins. At the end of the Interprovincial Postulancy Program, the postulants immediately travel to the Collaborative Novitiate for their investiture as novices.

## 9. Financial Considerations

Postulants are expected to contribute financially for the support of the friary through communal service and remunerative projects.

Postulants are put on the health insurance paid by the province. They pay for their own auto insurance, if applicable, as well as their personal expenses and recreation.

Postulants may seek outside employment as long as it does not interfere with the other obligations of the program.



C. Moments of Discernment—Evaluations, Departures, Petitioning for the Novitiate—and Documentation

1. Evaluations

a. Evaluation of the Postulant

Twice a year, the Director of Postulants consults the professed friars who live with the postulants in order to help him evaluate their progress and make recommendations regarding their further formation. He also consults others who are in contact or work together with the postulants, especially those who supervise their apostolic work. From this material and his own observations, the Director of Postulants writes a biannual evaluation on each postulant, which a copy is given to him in a conference. The original evaluation is sent to the Provincial Minister.

b. Peer Evaluation

Near the end of the provincial postulancy program, the Director of Postulants conducts a peer evaluation of the postulants; this material may be included in the postulants' final evaluations.

c. Program Evaluation

At the end of the provincial postulancy program and after the completion of the postulant evaluations and the peer evaluations, the Director of Postulants conducts an anonymous program evaluation, which is then submitted to the Provincial minister.

2. Departures

A postulant is free to withdraw from postulancy at any time [*Code of Canon Law*, 653], but as a courtesy he informs the Director of Postulants beforehand. Such a decision is not to be made lightly; rather, he is urged to discern his decision wisely before it is made by discussing it with his Director, his spiritual director, and others, and, if necessary, taking a break from the postulancy house or by making a retreat. It is prudent that the postulant allow a sufficient time of discernment or wait until a vacation or an evaluation period before departing from postulancy.

The Director of Postulants may dismiss a postulant who is judged to be unfit from the program with the consent of the council of the friars at the postulancy house [C. 36:2].

If the postulant decides to leave postulancy or is dismissed, the Director of Postulants writes a brief report to the Provincial Minister and puts a copy of it into the postulant's file. Then, he sends the file to the Provincial Secretary.

### 3. Petitioning for the Novitiate

After the postulant has received his final evaluation and prior to the end of the postulancy program, the postulant notifies the Director of Postulants of his intention to petition for entrance into the novitiate or to leave the order. If he wishes to petition for entrance, he writes a letter of petition to the Provincial Minister, which is sent to him by the Director of Postulants.

At the Admissions Council, the Director of Postulants proposes the postulants who have petitioned for entrance into the novitiate and conducts a vote. Afterwards, he writes a report of the vote and sends it as soon as possible to the Provincial Minister.

Once the Provincial Minister has received the final evaluation of the postulant, his letter of petition, and the vote report of the Admissions Council, he consults the Provincial Council and makes his decision [C. 19:2; 27:1]; then, he notifies the Director of Postulants, who relates as soon as possible the results to the Director of Vocations and to the postulant.

### 4. Documentation

The Director of Postulants saves a copy of the postulant's admissions file and adds pertinent material to it (evaluations, peer evaluations, certification from Praesidium or the Diocesan child protection program, report of departure, etc.) during postulancy.

At the conclusion of postulancy, the Director of Postulants sends all pertinent information about the postulant (his autobiography, health history, written evaluations, etc.)—except the psychological evaluations—to the Director of IPP or the Master of Novices. The psychological evaluations, along with its brief summary and recommendations, are sent to the Provincial Director of Initial Formation.

## V. Interprovincial Novitiate

### A. Introduction

Novitiate is a period of more intense initiation and a deeper experience of Capuchin Franciscan life in its fundamental demands, and it presupposes a free and mature choice of the religious life. It is a time of more intense immersion in the various aspects of our life, especially prayer, in order to build a firm foundation for the vocation of a friar minor.

The Province of Western America participates in the Interprovincial Novitiate sponsored by the NAPCC. Guidelines for the Interprovincial Novitiate can be found in its own manual approved by NAPCC. The following guidelines apply only for the Province of Western America.

### B. Novitiate Liaison

The Provincial Director of Initial Formation acts as the novitiate liaison by maintaining contact with the novices of the Province of Western America and the Master of Novices regarding the novices' progress and passes along all necessary information to the Provincial Minister. He visits the novices on different occasions during their program. Midway through the novitiate year, he, in consultation with the Master of Novices and the Prefect of Studies, contacts the novices to help them in the discernment of their vocational goals. (c.f. section on Post-Novitiate Studies). He also assists the novices in the application process to schools for their studies in Post-Novitiate Formation and in their documentation for first profession of vows (below).

### C. Procedure of First Profession of Vows

Since the Interprovincial novitiate currently takes place at San Lorenzo Seminary, Santa Ynez, the novices of the Province of Western America at the end of the novitiate year typically make first profession of vows at the Old Mission Santa Inés, Solvang. First

profession of vows is made into the hands of the Provincial Minister or his delegate for a period of two (2) years, at the end of which time they are renewed in biennial (2 year) periods until perpetual profession of vows is made.

The Master of Novices sends the files of each novice to the Director of Post-Novitiate Formation near the end of the novitiate year.

The PDIF, with the assistance of the Provincial Secretary, arranges for the documents necessary for first profession of vows.

Before first profession, the novices sign:

- The Declaration of Freedom and Intent;
- Disposal of Income Use and Administration of Property During Temporary Vows
- Will of Testator.

After professing vows, the novices sign:

- Document of First Profession

All four documents are to be kept in the provincial files.

After profession, the newly-professed friars receive a vacation allowance and take a two-week vacation, to be arranged with the Director of Post-Novitiate Formation. They are transferred to the house of studies, St. Conrad Friary, Berkeley, California, to begin their post-novitiate formation.

## VI. Post-Novitiate Formation

### A. Introduction

#### 1. Purpose

*“Post novitiate formation is the period in which the brothers, progressing further in maturity, prepare themselves for the definitive choice of our Gospel life that is undertaken through perpetual profession” (C. 30:1)*

Conversion to Christ is the central task of formation. It requires a change of heart, a turning around of one’s vision to a new way of Gospel living. Post-novitiate formation provides the period and environment in which this conversion deepens and becomes interiorized.

The chief components of this process are evangelical brotherhood, prayer and contemplation, manual labor, apostolic service (especially to the poor), and the study of scripture, spiritual theology, and the history and spirituality of the order. Training for professional ministry or other professions also begins during post-novitiate formation; however, formation in our way of life takes absolute precedence over this goal (CPO IV, 22).

In post-novitiate formation, friars take more self-initiative in directing their personal, spiritual formation.

#### 2. Personnel

The Director of Post-Novitiate Formation (hereafter called the Director) has the overall responsibility for the formation of the friars during post-novitiate formation. He also has the responsibility for supervision of the perpetually professed friars during their initial formation.

#### 3. Periods of Post-Novitiate Formation

In the first period of formation, which begins immediately after first vows and vacation, a friar in formation moves to the house of studies in order to begin studies for ministry (clerical or lay), internal service, or other forms of service (c.f., section VII. Post-Novitiate Studies). In the second period of formation, residency, formal studies are interrupted so that he may be assigned to work in full-time apostolate at another friary. After residency, he begins his last period of formation by returning to the house of formation to complete his formation and training.

#### 4. General Guidelines for Post-Novitiate Formation

The following general guidelines are to be followed by all communities that have friars in post-novitiate formation. Specific guidelines for each period of formation will be stated separately.

a. Fraternal Life

*“Since the life of evangelical brotherhood holds the principal place in our vocation, priority should be given to it during the period of post-novitiate formation” (C. 30:2).*

The formation community provides an atmosphere that promotes mature relationships among the brothers and gives support for their vocation as Capuchin Franciscans.

Communities are to meet regularly for local chapter to discuss issues of our life as well as the practical details of the fraternity. Everyone is encouraged to participate and make his feelings known.

The friars in formation are encouraged to spend time together, and fraternal activities are supported and promoted. Interaction with other houses of the province, especially houses of formation, is encouraged, as well as interaction with other religious.

Friars in formation are to develop community life skills, including cleaning, cooking, and basic house and auto maintenance. All the friars in the house take part in the work of keeping the friary clean (C. 84:6).

It is the responsibility of the whole community to support the structures of the common life. Perpetually professed friars, whether in houses of formation or in active ministry friaries, are to remember that they cannot pursue their mission unless they are continually renewed in faithfulness to their own vocation as members of a fraternal and contemplative brotherhood (C. 154:2-4). Furthermore, the presence of a friar in formation in a community augments their responsibility to foster the common life.

b. Prayer and Spiritual Life

The friars in formation continue their formation in the spiritual life, especially in prayer and contemplation.

The community gathers for daily Eucharist. Although the extent to which the Liturgy of the Hours is celebrated communally will depend on whether the fraternity is a house of formation or an active ministry friary, all fraternities at least celebrate Morning Prayer and Evening Prayer in common (C. 50:2).

Friars in formation take time for mental prayer (i.e., at least two half-hour periods daily). They are reminded of the importance of spiritual reading; they are also strongly encouraged to find a local spiritual director.

Friars in formation participate in the provincial retreats as well as a retreat of their own (usually sometime in December or January).

Formation communities set aside days of communal recollection. Friars in formation have opportunities for individual days of prayer and reflection, and resources are made available to realize them (transportation, funds, etc.).

#### c. Poverty and Simplicity of Life

*“Poverty demands a frugal and simple way of life in clothing, food, dwellings, and a renunciation of every form of social, political, and ecclesiastical power. . . Brothers should use as a precise and practical criterion: the minimum necessary, not the maximum allowed.”* (C. 60:4; 67:3).

Friars in formation continue to deepen their appropriation of Gospel poverty. They are to do an honest and hard day’s work, which is to be oriented for the common good of the fraternity and the whole church (CPO 1, 49).

Communities with friars in formation, especially houses of formation, corporately strive to live poorly and simply via concrete means, as, for example, by sharing cars, using mass transportation, eating simply, modest means of recreation, etc. (CPO 1, 60).

#### d. Franciscan Life

It is very important for the friars in formation to continue to deepen their appreciation and knowledge of St. Francis and the Franciscan movement. Formation personnel ensure that all the friars receive a basic formation in Franciscan studies during their religious formation.

Each January (or another time if more convenient), all the friars in formation gather for a presentation on a theme of Franciscan History, Spirituality, or, on occasion, a more praxis-oriented experience of Franciscan apostolates. This usually lasts about a week and includes discussion, lectures, or theological reflection. Topics especially important are: the writings of Francis and Clare; the history of the Order, especially the Capuchin reform; Franciscan thought on issues of peace, justice, and ecology; Franciscan approaches to prayer; contemporary Franciscan reflection on the world, etc.

In addition, the friars are encouraged to take classes in Franciscan themes if they are available locally. A friar in perpetual vows may also petition to study for a summer at a Franciscan center of learning.

e. Affective Life

The friars in formation also pursue their continuing affective maturation. To this end, they receive input in the areas of affectivity, sexuality, communication, commitment, etc., and for this purpose people with knowledge in these areas are invited to give talks, workshops, etc. to them.

The friars are encouraged in their relationships, both inside and outside the fraternity, with men and women. However, they must truly integrate these relationships with the needs of fraternal life, as well as consecrated celibacy, remembering that their primary home is the fraternity.

Friars who have emotional difficulties or other maladaptive behaviors may be directed to seek counseling, if the need is expected to be short-term (i.e., up to one year). If however, the friar seems to need long-term counseling for a serious problem, he is advised to leave the community and take care of it. Friars with chronic emotional or physical health problems are deemed inappropriate candidates for perpetual vows.



The friars in formation stay in contact with their families and may go home after Christmas and during vacation. However, they spend the major holidays with the fraternity. If their families live locally, they may visit them and are encouraged to invite them to the friary for prayer and meals.

Formation communities are open to visitors and guests so that the friars learn hospitality. However, the need for an atmosphere of prayer and recollection, privacy, and the fraternal life is also respected.

The Director, along with the fraternity, discusses the proper use of the media in the friary. A mature attitude and also a realistic look at the need for recollection and temperance in the promotion of a true and healthy spiritual life, especially in regard to celibacy, is encouraged.

#### f. Apostolic Life

The friars continue their development in apostolic service and ministry.

During the academic year, as much as possible, the friars have an outside apostolic service or ministry. Depending on the period of formation, this may be done on an individual basis, through school, or at another friary. There is to be some form of supervision or feedback.

During the summer and in residency assignments, the friars in formation (as well as perpetually professed friars in professional studies) work full-time at some ministry, unless some other formation goal is assigned (CPE, ESL, Spanish immersion, etc.) to them. Normally this is done at one of the houses of the province, though, if there is good reason, this may be done elsewhere. They live at one of our friaries, however, except in unusual circumstances.

The Director consults the guardian or ministerial director (pastor, school president, etc.) of the communities considered as possible placement sites to work out a tentative accord regarding the job description and supervisory requirements of the friar in formation during his assignment. He then submits his recommendations to the Provincial Council. The Provincial Minister makes the assignments and also appoints a Local Formator for each friar in formation on assignment. The Director then puts the final accord in writing and gives a copy to the Local Formator. If the Director wishes the friar in formation to work on

particular formation goals during his assignment, they are conveyed to the Local Formator and the friar in formation, either verbally or in writing, at this time.

Placement of the friars and the selection of their apostolic and ministerial assignments are to be based on their formation needs and not on other criteria, such as personnel requirements.

The assigned friar is a regular member of the community in which he is assigned and shares fully in that community's life. He receives a regular day off.

The Local Formator supervises the ministry of the assigned friar or at least sees that the ministry is supervised. Upon completion of the assignment, he, in consultation with the local community and other appropriate ministers, completes a written evaluation of the friar and submits it to the Director. Evaluations from the friar's guardian, other friars, or other ministers, are also encouraged. It is vital that the evaluation be an honest appraisal of the strengths and weaknesses of the friar. In addition, the assigned friar himself provides the Director with an evaluation of his experience.

It is very important that the friars in formation receive some experience of direct ministry with the poor and marginalized.

g. Educational life

The friars continue their educational development in accordance with their appropriate period in formation.

Acquisition of a second, ministerially useful language and the understanding of its culture are highly desirable goals of formation. This is especially true in regard to the Hispanic cultures (c.f., Mission Statement, 1988).

h. Missionary Life

Some experience of missionary life is desirable for friars in formation. A visit to our friars in the Mexican Custody or some other similar experience is recommended.

B. Formation at the House of Studies

1. Purpose

After novitiate, a friar in formation is assigned to the house of studies to continue his growth as a person and as a Capuchin Franciscan. The constituent elements of this period of formation include: fraternity, prayer and contemplation, apostolic service (especially with the poor), manual labor, Franciscan studies, and studies for professional ministry, internal service, or other forms of service. The formation goal is to achieve a harmonious integration of academic training with the rest of his spiritual formation.

2. Guidelines for Formation at the House of Studies

The following guidelines apply to post-novitiate formation at the House of Studies and are to be adhered to, along with the general guidelines in Section VI. A. 4 above.

a. Prayer and Spiritual Life

The friars are still being formed in the spiritual life, especially prayer. This is a period when they learn to integrate their prayer life with the rest of their activities.

Friars in formation are given the opportunity to plan prayer and liturgy in the community. They are encouraged to develop their knowledge and creative skills within the Church's liturgical tradition. Special attention is paid to the liturgical seasons and the principle of progressive solemnity.

The friars in formation should be encouraged to participate, as much as possible, in the prayer and liturgical life of the local church.

b. Poverty and the Apostolic Life

*“As followers of the life and rule of St. Francis, our vocation as Capuchins implies our existential condition of being poor men. As such, it should be a witness and prophetic sign in itself. Therefore we should have a preferential option for the poor, the needy and the suffering in every state of life, in a spirit of sharing and participation, in the condition of minority proper to the Order“ (CPO 5, 29).*

Whenever possible, friars in formation choose ministries that work with and serve the poor.

In the first few years after the novitiate, service with and for the poor is particularly emphasized (CPO 5, 40). Typically such work includes serving in dining rooms for the poor, visiting the sick, the elderly, or those in prison, or other corporal works of mercy. Each friar will work with the Director to find an appropriate apostolate.

The friars in formation are encouraged to have a variety of ministerial experiences during their formation. They are urged to pursue them with creativity and to have ministerial experiences with minorities and women, teams, the underprivileged, and in the area of social justice.

The Director ensures that the friars have supervision in their ministries and theological reflection on their experiences in ministry. This is done either by himself or by field education personnel.

c. Educational Life

*“Let the brothers take care, therefore that, while becoming skillful with their hands and well equipped intellectually, at the same time they be proficient in the special grace of working and be holy” (C. 38:2).*

At the student house, a friar in formation integrates a program of studies with the rest of his spiritual formation as a Capuchin Franciscan.

Typically during this period a friar in formation engages in full-time studies; however, the Director has discretion to alter his program in order to effect a harmonious balance between studies and other goals of formation. For example, a newly-professed friar may take fewer classes the first year in order to pursue a more involved apostolate, or a friar in formation may be directed to take fewer evening classes so as to preserve fraternal life, etc.

The Post-Novitiate Studies section (VII.) of the handbook examines in greater detail the educational and professional training of friars in formation.

d. Allowances and Vacation

Friars in formation receive an annual vacation allowance and a monthly allowance for their own personal needs and entertainment, which are set by the Provincial Minister.

Friars in formation receive one week of vacation at Christmas (or at another time with the permission of the Director) and an additional two weeks of vacation a year, to be arranged in conjunction with the Director.

C. Formation during Residency

1. Purpose

After a friar in formation has spent at least two years at the house of studies, he is assigned to work in full-time ministry at another friary. The purpose of Residency is to allow him to develop a realistic expectation of the life and ministry of a Franciscan once initial formation and ministerial training have been completed. After Residency, he returns to the house of formation to complete his formation and training.

Residency generally lasts from September to May but may include the preceding and/or succeeding summer, or it may last for two or more years. When Residency lasts longer, the

friar may have multiple assignment placements. Duration and placement considerations depend on the formation needs of the friar in formation.

## 2. Guidelines for Residency

The following guidelines apply to post-novitiate formation during residency and are to be adhered to, along with the general guidelines in Section VI. A. 4 above.

### a. Prayer and Spiritual Life

The friar in formation joins the community in its communal celebration of the Liturgy of the Hours (C. 50:2). He also participates in daily Eucharist.

### b. Franciscan Life

The friars in Residency gather with the other friars in formation when the course in Franciscan studies is held.

### c. Apostolic Life

The Director works out the ministerial job description and supervisory requirements for the friar in formation in the manner described in Section VI. A. 4. f.

### d. Educational Life

Friars may do a limited amount of academic work during Residency, keeping in mind that work, ministry, and prayer take precedence over academic studies. Field Ed credit for the M.Div. may be earned for ministerial work done during Residency. (See section VII. C. 1. b or 2. b. or the DSPT Student Handbook).

### e. Allowances and Vacation

Friars receive a regular day off and the prescribed monthly stipend of that community. They also receive three weeks of vacation, to be arranged in conjunction with the guardian, Local Formator, and the Director.

## D. Competency Goals for Friars in Post-Novitiate Formation

All friars need to demonstrate the possession of certain competencies in order to be able to live as Capuchin Franciscans. Below is a list of such competencies; it has the twofold purpose of acting as goals as well as evaluative criteria of the friars in formation.

The list of competencies is divided into four categories: personal life, community life, Catholic/Ecclesial life, and spiritual/Capuchin life.

## 1. Personal Life

The friar in formation:

- is able to be flexible and to handle changes, inconsistencies, or problems;
- demonstrates healthy self-care behaviors (physical exercise, recreation, nutrition, etc.);
- is relatively free of addictive or compulsive behaviors: perfectionism, drugs, alcohol, food, sex, work, television, ministry, exercise, study, etc.
- knows the weaknesses and drawbacks inherent in his personality and how they may unintentionally affect others in community and in ministry;
- understands his sexuality (including his sexual orientation) and has learned to integrate it with a public, committed lifestyle;
- develops and deepens relationships inside and outside the community; his outside relationships appear to be healthy and balanced as opposed to ones that appear to be “needy;”
- has initiative, drive and other skills (such as time management) which enables him to undertake a life of work and to meet his personal needs as well as his communal or ministerial obligations;
- shows a consistent, positive attitude of contentment;
- has a healthy spirit of generosity;
- demonstrates stability that indicates an ability to make a life-long commitment; for example, he is reasonably even tempered (i.e., not prone to depression, excitability, irritability, hyperactivity, etc.).
- reveals in his actions and speech that he has a depth and sincerity in his character as opposed to someone who is shallow and insincere.

## 2. Community Life

The friar in formation:

- is able to adapt without undue stress to a new, broader community beyond that of one’s peers;
- shows responsibility and initiative as evidenced in his care and upkeep of the local community, his work in the apostolate, in studies, etc.; he pulls his “fair share” of the daily tasks of community living;
- is hospitable toward others and shares in the tasks of providing hospitality;
- has good social and communication skills and able to resolve interpersonal conflicts;
- is relatively straight-forward in his self-expression; he is able to take appropriate risks in self-disclosure;
- expresses his anger in an appropriate manner;
- achieves an understanding of others that allows him to live sensitively and compassionately for others; appreciates and values the differences of others; he is considerate;

- has an attitude of appreciation and support toward those in authority; he is neither overly deferential nor overly negative and critical toward those in authority;
- learns how to work collaboratively and cooperatively with others, both as a leader and as a follower;
- is able to balance his personal need for autonomy with his public commitment to community;
- has respect for women and minorities in the Church and in society;

### 3. Catholic/Ecclesial Life

The friar in formation:

- experiences himself in a role of public witness to Catholic Christianity;
- acquires further learning regarding the celebration of the liturgy and its preparation, and develops an appropriate sense of leadership;
- knows at least the general outlines of Catholic theology in the conciliar and post-conciliar church regarding scriptural studies, Christology, ecclesiology, systematic theology, moral theology, sacramental theology, and pastoral service so as to serve the faithful as a potential member of a Capuchin pastoral team;
- demonstrates an appreciation and a love for the pluriformity of the Roman Catholic Church, specifically avoiding positions or behaviors which intend to harm the unity of faith; he practices a tolerance without surrendering fundamental principles;
- demonstrates a mature respect for the authority structure of the Roman Catholic Church and a willingness to follow their directives, showing neither a demeaning nor an excessively rigid attitude toward the hierarchy;
- demonstrates respect and support for the dignity of the laity;
- demonstrates a respect for fellow Christians not of the Roman Catholic communion and an ability to encounter them without confusion over Catholic positions regarding faith and its practice;

### 4. Spiritual/Capuchin Life

The friar in formation:

- demonstrates a desire for continued personal conversion, shown by giving and receiving fraternal correction, by practicing reconciliation sacramentally and fraternally; etc.
- demonstrates at communal prayer and meditation periods and in his dedication to personal prayer an authentic commitment to prayer, contemplation, and the spiritual life;
- fosters a genuine love for the poor of the Church and society, especially those present to us in our places of residence and work, and is willing to live this out through apostolic service;
- has incorporated and integrated the value of “minority” into his lifestyle, witnessed by an identification with the marginalized of society;

- demonstrates in his lifestyle a desire to live in a simple manner as befitting our Franciscan vow of poverty;
- demonstrates a capacity to live the vow of consecrated celibacy by abstaining from genital sexual activity and renouncing family life.

E. Moments of Discernment—Evaluations, Departures, Assessment for Profession of Vows, and Procedure for Profession of Perpetual Vows

1. Evaluations

a. Ongoing Evaluation at the House of Studies

At the beginning of the academic year, the Director meets with each friar in formation to draw up a series of goals and action steps for implementing the goals (see section D: “Competency Goals for Friars in Post-Novitiate Formation”). The Director puts the goals into writing to be reviewed mid-year and again at the end of the year when the annual evaluation is written.

The Director conducts a conference with each friar in formation at least once a month. He also supervises the apostolates of each friar or at least arranges for his supervision with some other qualified person in order to receive feedback. He also regularly consults the perpetually professed friars in the community regarding his formation.

At the middle and the end of the academic year, the Director meets with each friar in formation to review the extent of progress he has made in accomplishing the goals that have been set. The Director also meets formally with the perpetually professed friars of the community to consult them. He also consults those who have had a supervisory role or have worked with each friar. At the end of the year, the Director prepares a written evaluation on each friar in formation, which is signed by him and the Director, and then the evaluation is sent to the Provincial Minister.

At the end of the year, the Director solicits evaluations of each friar in formation by his peers and then gives the tenor of the feedback to each friar.

b. Ongoing Evaluation during Residency

At the beginning of Residency, the friar in formation, in conjunction with the Director and the Local Formator, draw up a series of goals and action steps for implementing the goals (see previous section D.). The Local Formator puts the goals into writing to be reviewed mid-year and again at the end of the year when the annual evaluation is written.

The Local Formator meets formally with the friar in formation at least once a month. He supervises his ministry or at least arranges for his supervision with some other qualified person in order to receive feedback. He also regularly consults the perpetually professed friars in the community regarding his formation.



At regular intervals the Director visits the friar in formation.

At the middle and the end of Residency, the Local Formator, along with the Director if possible, meets with the friar in formation to review the extent of progress he has made in accomplishing the goals that have been set. The Local Formator also meets formally with the perpetually professed friars of the community to consult them. He also consults those who have had a supervisory role or have worked with the friar. At the end of the year, the Local Formator prepares a written evaluation on the friar in formation, which is signed by him and the Local Formator, and then the evaluation is sent to the Provincial Minister and a copy is sent to the Director. Final evaluations from the friar's guardian, other friars, or other ministers, are also encouraged.

When Residency lasts longer than one year, the friar in formation revises his goals and action steps annually.

At the end of Residency, the friar in formation provides the Director with a written evaluation of his experience.

## 2. Departures of Friars in Temporary Vows

When a friar in temporary vows wishes to leave the order, he advises the Director (and the Local Formator if he is on a summer or residency assignment); the Director then advises the Provincial Minister.

A friar in formation whose vows are about to expire is free to leave the Order, whereas one whose vows do not soon expire is obligated to remain unless a dispensation of vows from Rome is granted to him. In either case, a decision to leave the Order is not to be made lightly; rather, he is urged to discern his decision wisely before it is made by discussing it with his Director, his spiritual director, and others, and, if necessary, by taking a break from the house of formation or by making a retreat. It is prudent that the friar in formation allow a sufficient time of discernment or wait until a vacation or an evaluative period before departing the Order.

The Provincial Minister may, at his discretion, grant the friar permission to live outside a religious house until a dispensation is granted or the friar's vows expire.

The province assists the brother in the transition back to secular life according to the circumstances of the individual. The Provincial Minister determines the amount and kind of material assistance the province gives in each case. Normally, insurance benefits cease upon

expiration or dispensation of vows. COBRAS or other such programs are the responsibility of the individual.

### 3. Assessment for Profession of Vows

Since the friars' conversion to Christ requires a transformation on many levels—intellectual, psychological, cultural, religious, professional—it is important that the process of assessment for profession of vows be broad and inclusive of several sources so that the discernment of the candidates' suitability is thorough. Final judgment of suitability rests on the Provincial Council.

#### a. Assessment for Profession of Temporary Vows

The friars in formation should consider temporary vows as a time of preparation for their final, definitive commitment as Capuchin Franciscans. However, at all times in their formation they are to be treated with respect as members of our fraternity.

In a timely manner prior to expiration of temporary vows, a friar in formation notifies the Director of his intention to renew vows or leave the Order. The Director solicits evaluations of the friar by his peers and also schedules a meeting of the perpetually professed friars who have lived in the community at least four months. When they gather together to evaluate the friar in formation, the Director provides them with whatever evaluative material is necessary to judge the friar's suitability. He then conducts a vote and writes a report, which includes the salient points of the discussion and the vote tally, and sends it to the Provincial Minister. The Director also gives the friar in formation the tenor of the feedback from the perpetually professed friars, his peers, and other sources. If he wishes to renew his vows, he writes a letter of petition to the Provincial Minister.

If a friar in Residency petitions for renewal of temporary vows, the local formator conducts the meeting with the perpetually professed in lieu of the Director (as in the preceding par.). He then conducts a vote and writes a report, which includes the salient points of the discussion and the vote tally, and sends it to the Provincial Minister. He also sends a copy of the report to the Director. The Local Formator also gives the friar in formation the tenor of the feedback from the perpetually professed friars, his peers (if applicable), and other sources. If the friar in formation wishes to renew his vows, he writes a letter of petition to the Provincial Minister.

If, during Residency, there is a question concerning the suitability of the friar in formation, the Director attends the meeting of the perpetually professed friars and conducts it (as in par. two, above), though he does not vote at the meeting.

The Formation Council recommends that temporary vows be taken in biennial (2 year) periods.

#### b. Assessment for Profession of Perpetual Vows

A friar in formation should not be rushed into making perpetual vows, which may be made up to nine years after first profession. However, if the reason for delaying perpetual profession is such that does not seem to be changing, the question of the person's suitability to our way of life must be addressed.

After a friar in formation has completed Residency and has returned to the house of studies for at least four months, he may petition for perpetual profession of vows. He makes known his desire to the Director, who then begins the process of approval.

The Director conducts an assessment of the friar in formation as in the manner for profession of temporary vows above (E. 3. a. par. 2). Any doubts regarding his suitability for perpetual profession are addressed before an official petition is made. If the friar in formation wishes to make profession of perpetual vows, he writes a letter of petition to the Provincial Minister. Before doing so, he may wish to make a (non-canonically required) retreat.

#### 4. Procedure for Profession of Perpetual Vows

##### a. Preparation

The Provincial Minister determines the location for the profession of perpetual vows after receiving input from the candidate. Profession takes place at one of the houses of the province unless there is good reason to do otherwise.

The friar makes an intense spiritual preparation for perpetual profession, which includes a retreat of at least eight (8) consecutive days, and some other time for reflection and prayer. A thirty-day guided retreat is recommended but not obligatory.

The Director, with the Formation Council, develops some sort of program or workshop or sends him to the Perpetual Profession Preparation Program (PPPP) in Rome to help him prepare for perpetual vows.

The province bears the cost of the profession and reception, although help from families, parishes, and others is accepted. Lavish parties are considered inappropriate for the occasion being celebrated and our way of life.

The candidate is cautioned to be more attentive to his spiritual preparation than to the details of the profession and receptions. He should have others take care of the details as much as possible.

##### b. Documentation

Proper documentation for perpetual profession is the responsibility of the Director. He sees that they are properly signed and witnessed (or notarized) and included in the friar's file. The documentation includes the following:

To be signed before the profession:

- Declaration of Freedom and Intent
- Disposition of Property
- Last Will and Testament

To be signed during the profession:

- Document of Solemn Profession

To be filled and sent after the profession:

- Notification of Perpetual Religious Profession

## VII. Post-Novitiate Studies

### A. Introduction:

The Prefect of Studies supervises all academic and professional programs of the friars in formation and the perpetually professed friars who are still in ministerial or professional studies. He works in conjunction with the Provincial Director of Initial Formation (PDIF) and the Director of Post-Novitiate Formation.

Studies are undertaken for the sake of the friar's personal growth and development, and as a preparation for service to the Church, to the fraternity, or to the welfare of the world. Every friar in formation will have a plan for studies approved by the Prefect of Studies. A plan of studies is formulated taking into consideration the friar's previous education and experience and his vocational goals as a friar.

Inasmuch as a friar's work may change frequently in the course of his lifetime, it is recommended that he attain a thorough preparation. As a general principle, an undergraduate education is open to every friar capable of it. Structured programs of study that confer degrees are preferable to those that confer certificates, and degrees or certificates are preferable to a scattered collection of courses.

A structured ESL program should be in place from the beginning of formation for friars who do not speak English as a first language.

Before a friar in formation registers for classes or other training programs, the Prefect of Studies reviews them to ensure that they meet the specifications of his plan of studies.

The Prefect of Studies identifies candidates for higher studies that will be useful to the province and presents them to the Provincial Minister.

### B. Process of Discernment for Special Formation:

*"It is the responsibility of the Order to help every brother to develop his own grace of working. Each brother according to his gifts should be formed for the various tasks that must be performed. Therefore some may learn skills and technical trades, while others may engage in pastoral or scientific studies, especially those of a sacred character" (C. 37: 3a; 4).*

Special Formation involves all those things, especially academic studies, which prepare a friar for his ministry and/or work as a Capuchin friar. This formation is directed toward one of four possible work or ministerial, vocational goals: clerical studies in preparation for ordination as a Roman Catholic priest, theological and/or professional studies for external lay ministry, studies for internal service to the Order, or studies for other forms of service.

#### 1. Criteria for Discernment of a Ministerial or Work Expression:

The following criteria are considered in the discernment of a work or ministerial, vocational goal of a friar petitioning for a program of special formation:

- Age
- Health
- Present level of educational attainment
- Intellectual ability
- Ministerial abilities (relational, generative, collaborative, etc.)
- Special skills or talents
- Language ability in the friar's target ministerial population as well as English
- Costs
- Culture
- Personal desires and goals

## 2. Process:

The vocational and professional discernment undertaken during postulancy is further made concrete during the novitiate. At the end of that time, the friar will be prepared to initiate a structured program of religious, academic and/or professional studies.

The process by which a friar initiates a program of studies is as follows.

- 1) Midway through the novitiate year, the PDIF, in consultation with the Director of Postulants, the Master of Novices, and the Prefect of Studies, contacts the novice to help him in the discernment of his vocational goals as a friar.
- 2) The novice proposes in writing a program for studies to the Prefect of Studies.
- 3) The Prefect of Studies confers with Director of Postulants and the PDIF, who then reach a consensus on a program of special formation for the novice. The Prefect of Studies then presents his recommendation in writing to the Provincial Minister, along with the novice's own proposal.
- 4) The Provincial Minister, in consultation with the Provincial Council, makes a decision on the program of special formation for the novice; he then informs the Prefect of Studies of it in writing, which becomes part of the friar's permanent file (with a copy to the Director).
- 5) The Prefect of Studies notifies the novice of the Provincial Minister's decision. The novice then begins the application process. If he is to begin studies at DSPT in the fall semester, he must complete the application by the first of July. The PDIF supervises his progress in the application process.

C. Programs of Special Formation:

1. Program of Preparation for Clerical Ministry:

Friars who will engage in clerical ministry are expected to have professional educational training and meet professional standards.

Friars who petition and are accepted for clerical studies by the Provincial Minister follow the guidelines set out in the current edition of the USCCB *Program for Priestly Formation*.

a) Undergraduate College Studies:

A baccalaureate degree is required before beginning graduate theological studies. Undergraduate college studies take place at community colleges and/or four-year universities near the house of formation.

During their undergraduate studies it is recommended that the clerical friars in formation take most, if not all, the prerequisites of humanities for professional ministerial formation stipulated in the *Program for Priestly Formation*. Otherwise, they must take them prior to or concurrently with their graduate theological studies.

During college studies, the following areas are to be considered:

- Development of written and oral communication skills is necessary.
- Friars in formation will be computer literate at least to the level of being able to use word processing programs. Skill with desktop publishing and spreadsheet programs is desirable.
- A ministerially useful, second language is highly desirable. The goal for clerical friars is to achieve a fluency so as to be able to celebrate the sacraments and to preach.
- Accounting and administrative skills are desirable.

b) Graduate Theological Studies:

The friars in formation pursue the four-year Master of Divinity program at the Dominican School of Philosophy and Theology (DSPT).

It is desirable that those friars with the capacity pursue a concurrent M.A. in theology with their M.Div. program.

In regard to electives, it is recommended that the friars in formation take:

- Courses in oral and written communication skills. Clerical friars also take additional courses in preaching, since it is a crucial part of our Franciscan vision;
- Professional ethics;
- Courses in the human sciences, which will help the friar develop pastoral sensitivity and counseling skills;

- Courses in Franciscan spirituality, history, writings, etc.

Friars take a basic quarter of CPE or its equivalent as part of the program for professional ministry. Alternately, they may substitute a year of supervised ministry accomplished during residency for the second year of field education (see DPST *Student Handbook*).

c) Mentoring:

Since formation as a priest involves not only academic study, the Director helps the friars to gain necessary practices and skills. If the Director is a lay friar, he petitions the Provincial Minister to appoint a priest friar to serve as mentor for the friar(s) in priestly formation. Ideally, this friar lives at the formation house, but he may be from another community if necessary.

2. Program of Preparation for Lay Ministry:

Lay friars who will engage in ministry are expected to have professional, educational training and meet professional standards.

a) Undergraduate College Studies:

Lay friars in formation who intend to complete a baccalaureate degree follow the same guidelines as in 1: a) above, except that they are not obligated to follow the requirements in the USCCB *Program for Priestly Formation*.

b) Graduate Theological Studies:

A full theological program for the Master of Divinity or the Master of Arts in Theology is open to all lay friars in formation. This typically takes place at DSPT. Those who intend to complete a master degree follow the same guidelines as in 1:b above.

3. Program of Preparation for Internal Service to the Order:

Those friars whose work will be largely internal service to the Order will pursue a structured plan that will qualify them to serve the needs of the province. Internal service may be oriented toward the trades and crafts (e.g., auto repair, carpentry, cooking, sewing, etc.) or it may be professional in nature (e.g., business manager, formation director, etc.). Thus, a friar's program of preparation will vary according to his goal.

Trade and craft studies and/or undergraduate college studies take place at trade schools, community colleges and/or four-year universities near the house of formation. Normally such a program covers three years.

Theological study at an adult level covering basic areas of scripture, doctrine and morality is part of every friar's post-novitiate training. The proposal for studies includes the means by which the friar proposes to do this study.



#### 4. Program of Preparation for Other Forms of Service:

Those friars who will work in other forms of service to contribute to the welfare of the world will pursue a structured plan that will qualify them in their field of work.

Trade and craft studies and/or undergraduate college studies take place at trade schools, community colleges and/or four-year universities near the house of formation. Normally such a program covers three years.

Theological study at an adult level covering basic areas of scripture, doctrine and morality is part of every friar's post-novitiate training. The proposal for studies includes the means by which the friar proposes to do this study.

#### D. Installation in Lay Ministries:

Installation in the lay ministries of reader and acolyte is open to all who have the capacity and required of those seeking ordination. Installation typically takes place at the post-novitiate house of formation.

Installation in the ministry of reader generally takes place during the second year of studies. Candidates for this ministry should have completed some introductory study of Scripture.

Installation in the ministry of acolyte generally takes place during the third year of studies. Candidates for this ministry should have completed some study of liturgy.

#### E. Orders:

Only those friars who have taken perpetual vows are admitted to the Sacrament of Ordination. Ordination to the diaconate normally takes place in the second semester of the third year of theological studies, or about one year before the completion of theological studies. Ordination to the presbyterate takes place after the completion of theological studies.

##### 1. Diaconal Ordination

With respect to the process of evaluation and approval for orders, approval for diaconate is fundamental since it implies that approval for ordination to the presbyterate will follow in due course.

About six months prior to diaconal ordination, the candidate presents a petition for ordination to his Director who forwards it to the Provincial Minister.

The Director arranges for the following:

- A consultation of the DSPT Faculty and the DSPT Director of Field Education;
- A self-evaluation by the candidate;
- A peer evaluation;
- A consultation of formation personnel. These will include the Prefect of Studies, the PDIF, the candidate's Formation Directors, and the candidate's current guardian.

When these consultations are complete, the Director reports the results to the Provincial Minister.

The Director also arranges for an Orders examination. The examination board will include at least one non-Capuchin faculty member and one Capuchin formation person. Approval for ordination is contingent upon successful completion of the Orders examination. After the examination, the Director prepares a document attesting to the names of the members of the board, the date of the examination, and the results.

Normally, ordination to the diaconate takes place in conjunction with other groups (religious orders, diocese).

The Provincial Minister writes dimissorial letters, permissions and related documents. A record of the ordination is kept in the friar's file and a copy given to the friar himself.

The Director obtains the required profession of faith from the candidate.

## 2. Presbyteral Ordination

About nine months prior to presbyteral ordination, the candidate presents a petition for ordination to his Director who forwards it to the Provincial Minister.

The Director arranges for the following:

- A consultation of the DSPT Faculty and the DSPT Director of Field Education;
- A self-evaluation by the candidate;
- A peer evaluation;
- A consultation of formation personnel. These will include the Prefect of Studies, the PDIF, the candidate's Formation Directors, and the candidate's current guardian.

When these consultations are complete, the Director reports the results to the Provincial Minister.

The Director also arranges for an Orders and Faculties examination. The examination board will include at least one non-Capuchin faculty member and one Capuchin formation person. Approval for ordination and granting of faculties are contingent upon successful completion of the Orders and Faculties examination. After the examination, the Director prepares a document attesting to the names of the members of the board, the date of the examination, and the results.

Presbyteral ordination normally takes place in one of our houses unless other arrangements seem better to the Provincial Minister.

The Provincial Minister contacts the bishop to make arrangements and writes or arranges for all dimissorial letters, permissions, and related documents. A record of the ordination is kept in the friar's file and a copy given to the friar himself.

The ordination and reception afterward are normally the financial responsibility of the province. The reception and other festivities surrounding the first Mass are normally the financial responsibility of the friar's family or others. All these should be arranged in accord with our vocation as Friars Minor.

## VIII. Appendices

### A. Non-Capuchin Franciscans in Formation

- Requests from other communities to send their students to us will be handled one at a time with an agreement on an individual basis.
- Our own needs for space in the future must be considered.
- We will contract and specify who has responsibility for the practical details of the arrangement. The interested jurisdiction will work out the contract with our Provincial Minister, Provincial Director of Initial Formation, and Director of Post-Novitiate Formation.
- The individual will follow the full program at the house of formation.
- The formation council has reservations regarding of non-Capuchin Franciscans in a house of formation. The formators hold that it is not a good arrangement for the other group(s) involved.

### B. Economic Policy on Students from Other Circumscriptions or Religious Orders

#### 1. Introduction

In the past, friars in initial formation or ministerial preparation from other circumscriptions of the Capuchin Franciscan Order or from other religious orders have come to the Province of Our Lady of Angels for studies. The Formation Council has established policies governing their expenditures for the purpose of having (1) a uniform financial standard for all students and (2) a method of recording and reporting transactions so as to ensure good financial stewardship.

#### 2. Guidelines

- The students of other circumscriptions or religious orders receive the same monthly allowance commensurate to their stage of formation as the friars of Our Lady of Angels province. The Provincial Minister and Provincial Council of Our Lady of Angels Province set this policy.
- All the same permissions for the use of money, cars, etc., are needed for the students from other circumscriptions or religious orders as for the students of our province.
- The Director arranges with the guardian and these students a method for recording their financial transactions and reporting them to their major superiors and/or respective formation directors. The accounting method will vary depending on the circumstances. In some cases, the guardian may record and report these transactions; in other cases, it may be the responsibility of the student or, if there are several students from the same circumscription or religious order, the responsibility of a student administrator (see below).

- The Director may make changes to the above policies for the adherence of formation or accounting standards.

3. Procedure when there are Multiple Students from the Same Circumscription or Religious Order

The Vice Province of Guam frequently has sent multiple friars for studies to Our Lady of Angels Province. The two provinces have set up the following system for handling the financial transactions of its students:

- The Vice Provincial Minister of Guam appoints one of his students, usually the most senior, to be administrator of the finances of the Guam students during their studies in our province.
- The administrator maintains a separate checking account to pay for their bills: room and board, private uses of cars, telephone, internet, books, etc. There should be other local signatures on the account (i.e., Director and assistant).
- The administrator also maintains a petty cash fund for the personal needs of the Guam students in the house of formation.
- If Guam students reside at more than one formation house, then the guardian maintains a separate petty cash fund at those houses where the administrator does not reside. The guardian also gives a financial reconciliation of the petty cash fund to the administrator for the preparation of his financial reports.
- The administrator prepares regular financial reports on the checking account and the petty cash fund(s) and gives copies of them to the Vice Provincial Minister and the Director.