

FORMATION MANUAL

2017

CAPUCHIN PROVINCE

OF ST. CONRAD

(MID-AMERICA)

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INTRODUCTION

“Formation is a work of art.”

These words of Pope Francis to the Union of Superiors General in November 2013 are an apt introduction to this Manual of Initial Formation for the Capuchin Province of Mid-America. God is the Artist. He calls young men to this life, transforms them in Christ and conforms them to the life of the Gospel in the Capuchin-Franciscan charism. We brothers in the province and especially in the ministry of formation share in the artistic work of God. We co-operate with the “Spirit of God and His holy operation” when we help our young men hear the call of Jesus, discern their Capuchin vocation and surrender themselves to the Spirit’s transformative work in their lives.

Formators must be careful and comprehensive artists. This manual describes and guides our accompaniment and our formation of each brother in his entire journey of initiation with us:

- -candidacy, vocational discernment and acceptance into the community;
- -initiation into the Order through the stages of postulancy, novitiate and post-novitiate preparation for Perpetual Profession;
- -formation for work and ministry as lay brothers or priests;
- -mentoring for each brother as he begins his specific ministry in the Order and Church.

The program at each level of the formation process utilizes certain goals, methods to achieve those goals, and means to evaluate their achievement. At the end of the manual are summaries of policies and procedures for each program and appendixes of documents related to the programs.

PART ONE: PHILOSOPHY

A. FORMATION RESOURCES

1. The Gospel.

Jesus is the model and teacher. He called those who would be his apostles to be disciples first of all. He established a close friendship with them and taught them by word and deed the love of God and the life of the Kingdom. Then he sent them out on mission, reminding them to remain always united to Him in their life and ministry.

Initial formation helps the young men whom God calls to our life to be good disciples, learning the mind and heart of Jesus and growing in a personal friendship with Him. Equally, it prepares the young friars to be good and responsible servants of the Gospel in their life and ministry as Capuchin brothers and priests.

2. St. Francis.

Francis was inspired by the Spirit of the Lord to a new vision and life of the Gospel. His vocation was nurtured and formed by intense prayer, by the Word of God, by the life of the Church, and by the poor people among whom he lived and served. When brothers joined him, Francis himself became for them the "*forma minorum*," both by teaching them and showing them the contents and dimensions of his charism.

As our "*forma minorum*," St. Francis provides us with three experiences of his conversion, discernment, vocational development to guide our formation programs also. These experiences are summarized and symbolized as the leper, the cave and the church.

+In Francis' encounter with the leper he embraced in one and the same gesture himself, the leper and the Lord Jesus, all poor and broken. After this encounter he embarked on a "life of penance" and began to order his whole existence to the way of Jesus poor and suffering.

+In Francis' time in the cave, through Scripture and prayer, he came to an intimate knowledge of his Lord and Spouse. This passionate love of Jesus impelled Francis to commit his life to the Lord and seek concrete ways to share this Love with others in the church and society.

+In Francis' re-building of the church and finding therein the Crucifix of San Damiano, he understood his call to follow Christ Crucified and build His Kingdom. Others joined him in this mission as "lesser brothers" in prayer, penance, preaching and apostolic love.

At the levels of postulancy, novitiate and post-novitiate, our initial formation programs offer to our brothers entering the Order today some parallel experiences of the leper, the cave and the church. Through reflection on their experiences and through the instruction and witness of the formative community, these brothers come to know and commit themselves to a life of prayer, penance, fraternity and minority in their service of the Order and the Church.

3. Capuchin Reform

The first brothers of the Capuchin Order had a clear sense of their call to a strict life of penance, austerity and contemplation, which bore fruit in their care for the poor and the infirm people of their day. These brothers "of the eremitical observance," especially through the Constitutions of 1536, adopted concrete exterior forms of prayer and poverty to guide and support their interior formation.

Our Constitutions of 2013 follow the tradition of the Capuchin Reform and the lives of the holy men and women of our history, who teach and strengthen our identity and charism in the world and Church. The Capuchin Province of Mid America, through integrated formation programs and experiences, guides our new brothers to know the Capuchin charism, to assume it as a personal identity, and to make a generous commitment to live it in prayer, fraternity, minority and service.

4. Documents of the Order

The most important document of the Order guiding our initial formation is the Capuchin Constitutions of 2013, most specifically Chapter II, **The Vocation to Our Life and The Formation of The Brothers** (#16-40). The section on "On-going Formation" (#41-44) guides this manual's contents for the period of time immediately following perpetual vows and priestly ordination.

Other Capuchin documents that help us to review and update our Manual of Initial Formation and our ministry of formation are the *Ratio Formationis* of the Order, Plenary Councils, letters from the General Minister, and other international or regional gatherings concerning the service of formation. Plenary Council VIII in 2015, on "*The Grace of Working*" is an important interpretive resource for understanding and implementing the Constitutions on "Formation for Work and Ministry" (*Constitutions* 37-40).

5. Documents of the Church

As we form brothers to be faithful to our charism in the Church and to be good and fruitful servants of the People of God, we are guided especially by these ecclesial documents:

- the *Catechism of the Catholic Church*, along with its supportive history, theology and spirituality in the *Documents of Vatican II*
- the *Code of Canon Law*, in particular the sections that treat of the Consecrated Life and the Priesthood
- the *Program for Priestly Formation* which guides our discernment and formation of brothers called to priestly ordination

In addition, we accept and study as ecclesial guidelines the current documents from the Holy Father and the Bishops of the United States, especially those relative to our life and ministry in Church. "*Gaudium Evangelii*" and "*Laudato Si*" of Pope Francis are clear examples of such papal documents.

B. THE PRESENT MILIEU OF FORMATION

1. The "Signs of the Times"

The present situation of the Church and Order in the world, especially in the United States of America, affects and guides our Capuchin formation of brothers and ministers **in** and **for** this social and ecclesial reality. The following are some of these signs of the times, the challenges they present, and the opportunities they offer for Capuchin-Franciscan formation:

- a. Secularism vs. Christian Faith. In a society that increasingly forgets God and constructs its life independent of Christian belief and practice, we are called to a constant re-evangelization of our Church and a new evangelization of our world, through word and witness. Our Franciscan Trinitarian and Christocentric theology, as well as our Capuchin prayer and penance, are most valuable contributions to a spiritual renewal in the Church and world.
- b. Individualism vs. Community. In a culture that proclaims the rights of the individual above the common good, we are called to invite everyone into Trinitarian community and fraternal union, especially those who are alone, isolated and vulnerable. Capuchin fraternity is a powerful witness and a practical tool for building community in the local and global life of the Church and world.
- c. Domination vs. Service. In a world where wealth, power and violence characterize economic and political relationships, Franciscan solidarity and service in minority are important correctives to this human interaction. The Capuchin tradition of "going where others don't" and moving to the margins of society makes our particular charism a precious gift to our times.
- d. Disrespect for Life vs. "Imago Dei". Contemporary society at all levels increasingly loses respect for life and disregards care for the earth. In a culture of death with a throw-away ethic, Capuchin-Franciscan reverence and respect for the human person as the very image of God, and for all creatures that inhabit the earth, our common home, makes the world more human and divine.

2. The Candidates

The vocations that God sends us influence and nuance our formation programs. Three characteristics of the candidates in the present milieu are important to note.

- a. Age and Relationship to the Church. In recent years, the candidates are younger once again, most of them in their 20's. They are more flexible and adaptable in the formation process than are candidates in their 30's and 40's. Even so, many of them are "returning Catholics" after some time away from the regular practice of their faith. They need time to work through and

integrate the recent experiences of life and the choices they made during their exile, in order to become solidly Catholic in their intellectual understanding and their regular practice of their faith.

- b. Race, Ethnicity and Culture. Candidates are increasingly non-white and non-European in background, color and culture. That means they are increasingly different from the majority of the community they are entering and of the formators who accompany them. This requires an awareness and honesty of the challenges on both sides, and the ability on the part of the province and formators to appreciate and affirm the positive qualities and gifts of the candidates.

The Hispanic candidates are the fastest-growing ethnic group, especially in the under-20 year age group in the Church. In their culture and language, they are a positive, life-giving resource and gift for the Order and for the Church. Many of them are younger than the average candidate, more closely connected to their families, and practice more regularly their Catholic faith. Visiting and working closely with their families is a necessary aspect of vocation ministry with most Hispanic candidates.

- c. "Evangelical Catholics." A growing group of Catholics in the United States, sociologically recognized as "Evangelical Catholics," account also for a growing number of our candidates. These young men are generally quite confident and assertive in their practice of the Catholic faith and in their sharing of the faith in various forms of evangelization. They also freely and happily promote vocations to the religious life. Evangelical Catholics' understanding of the Catholic faith and the Church's relationship to the world can be narrow or shallow. Their formation must include a solid understanding of the history and tradition of the Church. They also need the ability to respect and dialogue with other people outside of their own ecclesial experience and perspective.

The above profiles are helpful, but formation is about a person and his story, not about a label. It is necessary for vocation directors and initial formators to be open to and capable of working with the history of all our candidates. At the same time initial formation must carefully guard the Capuchin-Franciscan charism and identity as we accompany the candidates, help their discernment and form them in our way of life. This work of art must respect the grace of vocation in each candidate and not be hasty in the formation process.

C. PRINCIPLES OF FORMATION

As we work with the candidates in their existential reality and as we utilize the formation resources available to us – especially the Capuchin Constitutions – we follow these general principles of formation. These twelve principles are based in the formation philosophy presented in the *Constitutions #24*.

1. God is the source of formation. He calls each brother into the community of the Trinity and conforms him to Jesus in the Spirit through experience and reflection, event and word, action and prayer.
2. The Holy Spirit is the principal formation director for the brother. He is present and active in the brother as well as in the formation communities and personnel, all of whom co-operate with the Spirit of the Lord and His holy operation.
3. The brother is “the principal author of his own growth” and is primarily responsible for his own formation. In freedom he listens, responds and cooperates with the Lord through daily life and the various formation resources and structures available to him.
4. The main formation resources, in addition to the brother’s own life and prayer, are the Gospels, the life and writings of Francis, the Capuchin reform and Constitutions, the life of the Church and the signs of the times in the world.
5. Formation is an ecclesial task. The brother is formed by the liturgical life of the Church, by the Word of God as preached, by the people whom we serve and with whom we share life, especially those who are poor and live on the margins.
6. Formation is a charismatic task. Our brotherhood, called to cultivate and live our own identity in the Church, has the right and responsibility to form new members in conformity with our Capuchin-Franciscan charism.
7. Formation is a community task. The province is the context of the brother’s discernment of the Capuchin life and the affirmation of his vocation. The local community is the fraternal and practical expression of the charism for the brother (see Appendix A).

8. Formation is facilitated by designated personnel. The formation director who makes this his first duty, the staff or team who assist him, and the spiritual director of each brother are essential guides and companions in the formation process.
9. Formation is holistic. It works through the total history of the brother, bases itself on the principle of "grace builds on nature," and nurtures growth and development on the levels of human, Christian, Catholic and Capuchin life.
10. Formation is behavior-based. It utilizes external practices of virtue and self-denial as means to internal discipline and generosity, and it evaluates the brother's progress in formation by behaviors that are coherent and consistent with his stated values.
11. Formation is realistic. It balances the various polarities in our communal and personal lives: the ideal and the real, the Constitutions and the lived experience, the community and the individual.
12. Formation is graduated. As growth proceeds toward goals and the interiorization of values, external structures of formation are increasingly relaxed while personal responsibility and accountability in community are increasingly emphasized.

PART TWO: FORMATION PROGRAMS AT VARIOUS LEVELS

"Those who are admitted to the Order must be initiated and progressively introduced into the Franciscan gospel life. In order that this journey of initiation may unfold, candidates, guided by the formation personnel, shall be given the necessary experiences and knowledge.

During the time of initiation the formation of the candidates, harmoniously blending the human element with the spiritual, shall be sound, all embracing and adapted to the needs of times and places" (Constitutions 26:1-2). (See Constitutions 26-32.)

A. VOCATION OFFICE, DIRECTOR AND MINISTRY

“Concern for vocation arises above all from the awareness that we ourselves are living and offering to others a way of life rich in human and Gospel values, which, while offering genuine service to God and people, fosters personal growth.

Let us actively work together to foster new vocations, moved by the desire to carry out God’s plan according to our charism” (Constitutions, 17).

1. Vocation Office.

The first responsibility of the vocation office and director is to sensitize the brothers of the Province to foster vocations, and to coordinate all the vocation efforts of the province. The office prepares and directs the electronic communications as well as printed vocational literature. It sponsors or organizes vocation retreats and other events, and generally encourages and aids the brothers in their local vocation activities. The vocation team also cooperates with other religious and ecclesial vocation offices and directors in their efforts to promote vocations to Church ministries in all forms.

The second area of responsibility of the vocation office is the work of direct contact with prospective or actual candidates. Through the media, vocation programs, school talks, retreat experiences and other means, the team gives information and direction to the men who are considering our life. They keep contact with interested candidates through electronic means, phone calls and visits, and by gathering candidates together periodically for weekend retreats in one of the friaries. Where possible, the vocation team puts candidates in contact with the brothers in the local friaries, especially those assigned to be area contact friars.

The third major duty of the vocation team is to accompany prospective candidates as they discern the Capuchin life, prepare for it in whatever practical and spiritual ways are necessary, and finally make application to the Province. The members of the team do this accompaniment either directly in personal guidance of the candidates, or indirectly through local contact friars who accompany the candidates. This accompaniment introduces the candidates to the life of prayer, fraternity and ministry of the brothers. The candidates come to know more clearly the Capuchin charism as well as their own response to the Capuchin life, discovering more deeply both their call and their gifts and ability to respond to the call.

Several programs of the vocation office, as explained below, are available to help the candidate address his practical and spiritual needs in preparation for Capuchin life and ministry. In each program, the vocation office and team directly guide the candidate’s process of applying to the postulancy program.

2. Candidate Programs

College Seminary Program. A college seminary program is designed to give college students or prospective candidates of a similar age the support of a peer group, as well as appropriate education and formation, as they seek to grow spiritually and discern their vocation. There is no presumption that a candidate has already made a firm commitment to the Province, or the Province to him. He must, however, be willing to fulfill the conditions of the program and demonstrate an increasingly serious interest in preparing for initiation into the Capuchin life and ministry.

The Province provides official sponsorship for the seminary student and entrusts his spiritual, emotional, academic and apostolic formation to the seminary staff, according to the guidelines of the United States Bishops for seminary formation. (See *Program for Priestly Formation*.)

Candidates for the college seminary program must be high school graduates or of equivalent age or older. They must have the personal moral strengths befitting serious candidates for the Capuchin life. Admission requirements for the program are these:

- 1) The documents required by the college seminary,
- 2) Two letters of recommendation, one from the candidate's pastor,
- 3) Acceptance by the Vocation Director.

Once a candidate is accepted, the Vocation Director should inform the Provincial Minister, the Director of Initial Formation and the Province communications office.

The candidate pays for his own tuition and college costs. The candidate may also apply for seminary scholarship funds from the province. Once a candidate enters postulancy, the Province makes payments on his loans while the brother is in initial formation. The Province pays off the entire loan once the brother makes perpetual profession. But if the brother leaves the community during initial formation, he assumes the obligation for the rest of the loan and reimburses the Province for whatever part of the loan it paid. (See Appendix B: Loan Contract with Province.)

The Vocation Director keeps in regular contact with the seminary staff, receives the candidate's grades and evaluations, and consults with the appropriate seminary staff members about his formation needs and concerns. The Vocation Director abides by the decisions of the seminary staff regarding the candidate's formation and his continuation in the program.

If a candidate leaves the seminary, he must wait at least one semester before reapplying to a candidacy program of the province. If he is dismissed, he must wait two years.

The candidate usually makes application to postulancy during the final year or semester of his seminary program. He writes a letter of request to the Provincial Minister. The application process is coordinated by the Vocation Director.

Resident Candidate Program. A resident candidate lives in a friary, with the permission of the Provincial Minister and in consultation with the local community. He shares community life with the friars (and other candidates) while he deepens his discernment and prepares for the postulancy. This program is designed for a candidate who wishes to apply for the postulancy in the near future but needs some time to pay off some debts, wants to finish a college or academic program, or needs to attend to some other proximate preparation for the postulancy. A resident program is especially helpful for a candidate who otherwise would live at a great distance from the friars. Living with the friars allows for a better mutual discernment of the candidate's vocation.

Those entering this program must be high-school graduates. They should have the personal and moral strengths necessary for serious candidates for Capuchin life. After a period of contact and acquaintance, the Vocation Director presents the candidate for acceptance into the local friary. The Guardian accepts the candidate into the friary with the permission of the Provincial Minister and in consultation with the local community.

Admission requirements for the Resident Candidacy Program are these:

- 1) A letter of request
- 2) A letter of acceptance from the Vocation Director
- 3) Two letters of recommendation, including one from the candidate's pastor
- 4) A letter from the seminary rector (if applicable)
- 5) An in-depth Behavioral Assessment interview report.

Once a candidate is accepted, the Vocation Director informs the Provincial Minister, the Director of Initial Formation and the Province communications office.

The Resident Candidacy Program is typically from six months to a year in length, though it can be extended in certain circumstances. The candidates participate in the prayer, activities, and schedule of the house where they reside while continuing their employment, education, and/or ministry. The Vocation Director assigned as the Resident Candidacy Program Director is the director of the candidates living either in the candidacy house or the friary.

The Candidate Director meets regularly (e.g. bi-weekly) with the candidate to review his spiritual and community life, fulfillment of the tasks and goals of the program, and his discernment and preparation for the Capuchin life. The Director and other members of the resident community give to the vocation office a regular (e.g. bi-monthly) evaluation of the candidate, based on the goals of the Candidacy Program listed below.

The Vocation Director and the Guardian, in consultation with the Provincial Minister, can dismiss the candidate from this program at any time.

The candidate usually makes application to the postulancy during the spring semester of his residency program, through a letter of request to the Provincial Minister. The application process is coordinated by the Vocation Director.

Non-Resident Candidate Program (Contract). The contract program is designed to give spiritual help and guidance to the non-resident candidate who commits himself to a more serious preparation for the Capuchin life, while he continues his work, school, etc. in the context of his own home. The contract program, directed by the Vocation Director, uses a spiritual agreement or “contract” to develop the candidate’s personal formation plan. This contract is also used in evaluating his progress of growth in view of his applying to the postulancy. The contract is signed by the candidate and by the Vocation Director, or by another brother the Vocation Director appoints to be a local director. (See Appendix C: Spiritual Agreement for Non-Resident Candidate.)

In addition to a close relationship with the provincial Vocation Director and his local director or contact, the candidate spends as much time as possible with the friars and fraternities of the province.

A candidate may enter the non-resident program at any time he is judged ready by the Vocation Director. He must generally be in the program at least three to four months before entrance into postulancy. Candidates for the non-resident program must be high school graduates. They must have the personal and moral strengths necessary for serious candidates for the Capuchin life.

Admission requirements for the non-resident program are these:

- 1) A letter of request and acceptance by the Vocation Director,
- 2) Two letters of recommendation, one from the candidate’s pastor,
- 3) A contract worked out between the candidate, Vocation Director and local director.

Once the Vocation Director accepts a candidate into the non-resident program, he should inform the Director of Initial Formation for the Province and the provincial communications office.

There is nothing legally or morally binding about the contract used in this program. However, the candidate’s faithfulness to the contract is one of the important measures used to evaluate his preparedness to apply for postulancy. The Vocation Director, together with the other brothers involved in the candidate’s formation, evaluates him and his contract on a regular basis.

The Vocation Director, in consultation with the candidate’s local director, can dismiss the candidate from the program at any time with good reason, in which case he informs the Director of Initial Formation and the Province communications office. If a candidate leaves the program, he must wait at least six months before applying again; if he is dismissed, he must wait at least two years.

If it seems advisable to the Vocation Director, the non-resident candidate can also move to the college seminary or the resident candidacy program, having fulfilled the requirements for those programs.

After at least three or four months, the candidate makes application to postulancy any time he, his local director and the Vocation Director agree that he is ready. He applies to the postulancy through a letter to the Provincial Minister and through a process directed by the Vocation Director. The local director submits a letter of recommendation to the Postulancy Admission Board.

3. Candidate Goals for Admission to Postulancy

“For this reason, since the brotherhood must constantly grow in virtue, in the perfection of love, and in the spirit of the Gospel rather than in number, those who wish to embrace our life must be thoroughly examined and accompanied with care in the discernment of their vocation” (Constitutions, 18).

For acceptance into Postulancy, the candidates must be able to fulfill the requirements presented by the Constitutions #18 for admission to the Order. This list incorporates Francis’ directive to the Order in *RB2 (Rule of the Lesser Brothers, chapter 2)* and the requirements of Canon Law #219-220.

1. Candidates must be temperamentally suited for the living of our Gospel life in brotherly communion.
2. It is to be ascertained that they enjoy the physical and mental health necessary to lead our way of life.
3. Candidates are to show by their lives that they firmly believe what holy Mother Church believes and holds to be true and that they possess a Catholic instinct.
4. It must be evident that they enjoy a good reputation especially among those who know them well.
5. They are to be endowed with the required human maturity, particularly affective and relational, and with a generous will. In addition, it must be ascertained that they enter the Order with the sole purpose of sincerely serving God and for the salvation of people, according to the *Rule*, the form of life of Saint Francis, and our *Constitutions*.
6. They are to be educated according to the standards of their own region and show promise of being able to carry out their future duties effectively.
7. All useful information shall be collected about their previous life, especially in the case of older candidates or of those who have already had some experience of religious life.

8. For the admission of diocesan clergy, or those coming from another institute of consecrated life, a society of apostolic life or a seminary, or for the re-admission of our own candidates, the prescriptions of the universal law are to be observed.

Many of these requirements will be more clearly discerned and fulfilled as the postulancy and novitiate progress, before the actual admission of the candidates to the profession of our life. Yet even as the candidate enters postulancy, these criteria must be used to discern whether he has a good chance of fulfilling these requirements. The following goals take their content from this overall goal of immediate preparation for the postulancy and overall preparation for the Capuchin life.

a) Candidate goal 1: The candidate should grow in personal maturity and the freedom to make a personal choice.

Means:

-regular interaction with program director, staff and local community, personal responsibility for life (e.g., education, job), regular physical exercise and bodily care,
-interaction with the broader social community (women, other cultures, races, religions, social-economic groups).

Questions for evaluation:

Does the candidate have normal health, hygiene and etiquette?

Can he speak openly about his emotions?

Does he seem to get along well with others, i.e., is he at ease versus distant, edgy, etc.?

What is his understanding of "celibate chastity" in relation to his particular life situation?

Has he a healthy attitude in relationship to authority, i.e., does he seem comfortable in discussing relationships with authority figures and indicate a willingness to approach those in authority?

Does he recognize any dependence on externals (materialism, consumerism, status)?

Are there any signs or concerns about possible addictions (drugs, alcohol, sex/pornography)?

How has he used social media and are there any indications of disrespect, bullying abuse or sexual addiction in his social media history?

How does he speak about his fidelity to chosen commitments (jobs, education, apostolate)?

Methods of measurement:

-behavioral assessment interview,

-face-to-face interviews with more than one representative of the Order,

- psychological testing,
- health reports,
- review of candidate's publicly accessible content of social media,
- observation, interviews, and evaluation by director,
- observation by Vocation Director and local community of friars, reports and recommendations from past employers, especially church-related employment.

NOTE: The province's accrediting agency Praesidium's standard #1.R.2.e requires "a review of publically accessible content on all the social media, personal blog sites, and web sites associated with accounts controlled by the Candidate." (See Appendix D: Form for Candidate Social Media Survey.)

b) **Candidate goal 2: The candidate should develop knowledge and skills in using his personal gifts and talents for the church and the world.**

Means:

- college and other educational facilities,
- cultural and educational opportunities outside the academic institution, work experience, internships and on-the-job training, ministry experiences.

NB: For students planning to enter priesthood studies later on, the seminary program requires at least 30 hours of specified philosophy and a strong background in theology and the humanities, as required by the U.S. Bishops for seminary education (see *Program of Priestly Formation*). In addition, for freshman entering the college program, our Province requires 12 hours in Spanish for the sake of ministry to the Hispanic people in our Province (see Appendix E: Academic Requirements for Priesthood Candidates).

Questions for evaluation:

What high school diploma or G.E.D. and university degrees does the candidate possess? What is his GPA?

In what outside educational and cultural activities does he participate?

How well does he perform in work and apostolic experiences, i.e., is he considered punctual, consistent, hard-working?

How would you describe his attitude toward work and/or education? How does he show interest in world and ecclesial affairs?

Methods of measurement:

- transcripts and achievement tests scores (e.g., SAT, ACT, GRE),
- observation and evaluation by director and/or supervisors.

c) **Candidate goal 3: The candidate should develop an awareness of the presence of God in his life, an understanding of the Church and a sense of being called by the Lord.**

Means:

- study and living of the Catholic faith and Christian life, spiritual reading and study, spiritual direction,
- daily prayer and meditation,
- the Eucharist and other community prayer experiences, recollection days, retreats and renewal experiences,
- apostolic service to the local church.

Questions for evaluation:

- How does the candidate describe his experience of God and prayer?
- Does he show initiative in participating in prayer and worship?
- Does he regularly visit his spiritual director?
- How does he describe his experience of spiritual direction?
- Has he the ability to talk about his Catholic faith and experience?
- Is he faithful to a chosen apostolate?

Methods of measurement:

- community observation,
- feedback from people inside and outside the community, observation, interviews,
- evaluation by director.

d) Candidate goal 4: Does the candidate have a general knowledge of Capuchin life and desire to live it?

Means:

- contact with the friars,
- literature and other information about St. Francis, our Order and life,
- weekends and other "live-in" experiences in our friaries or other gatherings of candidates,
- direction by program director,
- visit to the postulancy house.

Questions for evaluation:

- What has the candidate done to increase his knowledge about Capuchin life?
- What are signs of his growth in embracing the Capuchin charism?
- How does he participate in candidates' gatherings?
- How well has he applied himself to his personal formation program?

Methods of measurement:

- observation, interviews, and evaluation by director,
- written essay and/or scrutiny by the director and two other friars,
- evaluation by local community.

4. Process and Requirements for Admission to Postulancy

The candidate for postulancy, upon the approval and recommendation of the Vocation Director, writes a letter to the Provincial Minister requesting admission to the Postulancy Program. The vocation office assists the candidate in preparing his application packet, including the required documents below (see Appendix F, Checklist for Application to Postulancy Program).

The Director of Initial Formation schedules and convenes the meeting(s) of the Postulancy Admissions Board, set up by the Provincial Minister, presides at that meeting, and passes on the recommendation of the Board to the Provincial Minister. Two dates are set up annually for the meetings of the Admissions Board, one in mid-April and the other in mid-May. (See Appendix F-1: Procedures for Postulancy Admissions Board.)

The vocation office provides the application packets for the Admission Board at least one week before the meeting, and the vocation director presents the candidate to the Board.

Once the Minister Provincial accepts the postulant, he informs him of his acceptance and communicates the decision to the Province communications office. The postulant director then writes to the postulant a letter of information about the postulancy year and things to consider in preparation for it.

The admissions requirements for the Postulancy are these:

1. A written letter of request from the candidate to the Provincial Minister,
2. A completed application form, including a face-to-face interviews with the vocation director and another representative of the Province.
3. A spiritual autobiography,
4. A behavioral assessment report.
5. A report from any past seminary the candidate attended or religious community to which he belonged, if only in initial formation,
6. Five letters of recommendation (at minimum, three personal, two professional):
 - a. -one from the director of the seminary, the resident candidacy program or the contract program (if applicable)
 - b. -one from the pastor where the candidate resides
 - c. -one from a family member

- d. -two or more from a priest, former teacher, supervisor, or someone who knows the applicant well
7. A psychological evaluation by a competent psychologist,
8. A background questionnaire concerning sexual misconduct,
9. A signed consent to release privileged information,
10. A medical examination report, including a drug screen and HIV test reports*,
11. A dental examination report,
12. Academic data from previous schools, at least high school and any college courses,
13. Sacramental certificates of Baptism and Confirmation with any notations,
14. Civil documents as needed, e.g. military status or valid immigration status,
15. A criminal background check covering the last 7 years,
16. A written report on the review of the candidate's social media content.

***Special note must be made of these medical and psychological conditions:**

- a) A candidate with a physical handicap may be admitted to postulancy if his handicap does not hinder his living out the essential elements of our charism, if the community can make the necessary adjustments to the handicap, and if the handicapped person's presence in the community would not result in financial difficulty for the community now or in the foreseeable future,
- b) A candidate who requires medication in order to maintain psychological stability will generally not be considered for acceptance into postulancy,
- c) A candidate who tests positively for drugs would not be considered for postulancy at that time, and he would generally have to wait two years before applying again,
- d) A candidate with an addiction to or a regular practice of alcohol, pornography or sexual relations (heterosexual or homosexual) would generally have to be free of those addictions and practices for two years before applying,
- e) A candidate who tests positively for HIV would not be considered a candidate for the Order.

(The method of testing for HIV is this. The Vocation Director informs the candidate that an HIV test is a required part of the medical report; the candidate receives the medical report from the testing physician or medical institution; the candidate submits the medical report to the Vocation Director as part of his

application file, or he may choose not to, thus keeping the information to himself and ending his application process.)

B. POSTULANCY PROGRAM

“The Lord gave me, Brother Francis, thus to begin doing penance in this way: for when I was in sin, it seemed too bitter for me to see lepers. The Lord Himself led me among them, and I showed a heart full of mercy to them. When I left them, what had seemed bitter to me was changed into sweetness of soul and body. Afterwards I tarried a little and left the world” (Testament of St. Francis).

The **leper** is an important symbol of initial formation at the level of postulancy.

Francis consciously responded to God’s call when he risked kissing and embracing the leper. Similarly, the postulant commits himself to enter into a new environment where he encounters the pain and brokenness of a sinful world. As he seeks the meaning and purpose of his life, he faces his own inner sins, fears, inadequacies and imperfections.

The Spirit speaks to him in these moments of conversion, moving him, like Francis, to respond with his whole heart and soul in an act of faith. Like Francis in the presence of the leper, the postulant’s response to grace will be accompanied by hesitation and struggle. In facing his human limitations, he finds strength and encouragement with the help of the community and his directors. Through fraternal companionship, he is led in prayer to a deeper union with the living God, whose power makes all things possible.

Making the decision to “leave the world” was a difficult one for Francis and did not happen quickly. Jesus’ call to “reform your life” (Mark 1:15) and Paul’s invitation to be “transformed by the renewal of your mind” (Rom. 12:2) required for Francis a radical and painful re-ordering of values and priorities in his life. So it is for the postulant. Through making difficult personal choices and embracing new experiences in ministry and fraternity, he opens himself up to the inner grace of spiritual transformation.

“This is what I want with all my heart,” Francis exclaimed when he understood his call to a four-fold embrace: his own broken and graced life, the fraternity of brothers, his brothers the lepers, and his Lord Jesus in the service of the Church (I Celano 22). Joy, peace and generosity will be the key signs that the postulant has discerned clearly his vocation and is ready to enter the novitiate.

1. Program

¹*The postulancy is the first period of initiation when one makes the choice to adopt our life.*

²*During this period, the postulant comes to know our life and makes a further and more careful discernment of his vocation. For its part, the fraternity comes to know the postulant better and ascertains the growth of his human maturity, especially affective maturity, and his ability to discern his life and the*

signs of the times according to the Gospel.

³The postulant, therefore, must be helped in particular to deepen his life of faith. To this end, the formation of the postulants is chiefly aimed at completing their catechesis in the faith, introducing them to the liturgical life, to the methods and experience of prayer, the study of our Franciscan heritage, to life in brotherhood, and to an initial experience of apostolic work (Constitutions 30).

The postulant program is the beginning of “initial formation,” according to the Constitutions, and is designed to prepare postulants for the novitiate. The postulancy program lasts one year, with the possibility of being extended to a second year if necessary and recommended.

(The last two months of the postulancy are spent in the IPP program of the NAPCC, as explained below.)

In the first days of the postulancy, or as early as possible in the year, the Vocation Director visits and meets with the Postulant Director to present to them the new postulants. This meeting provides for a formation transition from candidacy to postulancy and facilitates a continuity of growth in human and spiritual areas of the postulant’s life.

The postulancy begins with a pilgrimage retreat, followed by a reception ceremony. Each postulant is given a tau cross as the sign of postulancy. During the rite a document of entrance into initial formation is signed, which is then placed in the provincial files. (See Appendix G: Document of Entrance into Postulancy).

Once the candidate is accepted into postulancy, two separate files are begun on him. One is the official file, kept in the provincial office, containing official and ecclesiastical documents, documents of profession, Last Will and Testament, and annual evaluations during the time of initial formation. The other file is a “passing” formation file containing the candidate’s history, psychological and medical and academic reports, and the evaluations at each stage of formation. This passing file is for the use of the formation directors only. It is passed from one level of formation to the next as the candidate progresses. Once its formation purpose has been served, the “passing” file is sent to the provincial office where it will be destroyed after relevant documents are transferred to the permanent file.

The psychological testing reports required for admission to the postulant program are used for the candidate’s formation during postulancy, novitiate and period of temporary vows. Accordingly, he signs a permission statement (see Appendix H: Release Form for use of Psychological Test Results) for its use. At the time of perpetual vows, the

psychological testing report and other psychological reports generated during initial formation are to be destroyed by the Formation Director.

At that time, the Formation Director shall draw up a statement, to be placed in his official file in the provincial office, attesting to the removal and destruction of the psychological test report and other psychological reports. This statement includes the name of the friar, the type of document removed (i.e. psychological test report), the original date of the document being removed, the reason for the generation of the document (i.e. admissions and initial formation), the reason for removing the document (i.e. admissions and initial formation being completed) and the date on which the document is being removed. The statement will also include one of the following paragraphs:

(1) 'Nothing in this report about <name> provided any sign of addictive behavior regarding alcohol or drugs, nor misconduct in relationship with members of his own sex or the opposite sex, nor with minor children and adolescents.'

(2) 'Nothing in this report about <name> indicated that he had an untreated alcohol or substance abuse problem at the time the report was generated. Nothing in this report provided any sign of misconduct in relationship with members of his own sex or the opposite sex, nor with minor children and adolescents.'

The statement is signed and dated by the Formation Director removing and destroying the psychological test report and other documents from the file (Appendix N).

Prior to entering postulancy, the candidate is to have paid, or has sufficient funds to pay, all his outstanding debts: legal, medical, dental or personal. The Province does not assume responsibility for these financial obligations. Payments on student education loans, however, will be covered by the Province as they come due, provided that the debt does not exceed more than \$50,000, and the candidate, in a signed document, agrees to reimburse the Province for all such payments should he decide to leave the brotherhood (Appendix B).

Ordinary expenses during postulancy will be paid by the Province. The provincial office pays for the postulant's insurance (if he is not covered by another policy), and the local fraternity provides for all his ordinary needs of housing, food, clothing and recreation. On his part, the postulant assists the brotherhood by his work in the community and by contributing whatever he earns or whatever he receives in small gifts to the fraternity. Larger gifts or things like an inheritance he deposits in his own savings account. These financial understandings are written and agreed to by a signed contract between the postulant and his director. (See Appendix I: Postulancy Financial Agreement.)

Within the first month of the program the postulants undergo a safe environment introduction training, which includes studying the Province's *Provincial Policy for Protecting Children – Safe Environment in our Ministries and Communities*. Upon

completion of the training the postulant signs the Province's Acknowledge of Receipt form (see Appendix I-1), which is sent to the Provincial Office for the brother's permanent file along with letter from the Postulant Director attesting to the date, length of time and content of the training. A copy of the Acknowledge of Receipt form is placed in the postulant's passing file.

The director and staff evaluate the Postulant three times a year, in the months of October, January and April. The year-end evaluation is written and put in the passing file, with a copy sent to the Provincial Minister for his review. The Provincial Minister alone, according to the *Constitutions* #36, or in extreme circumstances the Postulant Director, has the authority to dismiss a candidate from postulancy. When a postulant decides to leave the program, he is to submit this request in writing to the Provincial Minister. When a postulant leaves or is dismissed, the Postulant Director should inform the Provincial Minister, the Director of Initial Formation and the Provincial communications office. If he wishes at a future date to re-enter the brotherhood, he must wait at least one year before re-applying. If he has been dismissed, he must wait at least two years. In both cases, his re-admission process will take into account his initial admissions and the subsequent evaluations and reasons for leaving or dismissal.

Upon his completion of the postulancy, the postulant will make application to the novitiate through a letter of request to the Provincial Minister no later than April 15 so that he can be accepted by May 1 by the Provincial with his Council. If accepted for the novitiate, he will take a vacation of two weeks before the beginning of the NAPCC common pre-novitiate [Inter-Provincial Postulancy] program beginning the end of May.

The postulant will keep his baptismal name upon entering into the novitiate, according to the norm of the Constitutions (see Ordinances 2:12). If he wishes for a serious and considered reason to change or augment his baptismal name, he must include this in his letter to the Provincial Minister requesting acceptance into the novitiate.

2. Postulancy Goals, Means and Methods of Measurement

a) Postulancy goal 1: The postulant learns to reflect critically on his life, disconnects from the dominant culture's values and priorities, continues his Gospel conversion, and begins to convert to Capuchin values.

Means:

- a physical move to a new community and a distance from family and friends,
- limitations on the use of mass media and secular recreation,
- tranquil environment and recollection, silence, and hermitage time,
- work and ministry with people in minority situations, in "powerlessness" as little brothers,

- experiences enabling the postulant to leave his comfort zones and question his outlook on life, his attitudes and behavior patterns,
- group reflection and dialogue,
- selected readings and study, especially saints and heroes,
- meetings with the program director and a spiritual director,
- use of autobiography or life story.

Questions for evaluation:

- How does the postulant evaluate his personal values and life style?
- How does he handle the separation from family and friends?
- What choices does he make relative to mass media and recreation?
- How does he handle silence, solitude, and times of not being "productive"?
- Can he honestly face and talk about his compulsions and struggles with emptiness and loneliness, discouragement and disappointment?
- What are examples of his choosing a simpler life-style and recreation?
- How does he demonstrate flexibility, with a capacity for change?
- How does he communicate compassion for the poor?
- How does he speak about the past, deal with the present, and envision continued conversion and growth?
- What is the quality of his self-disclosure?
- Does he positively choose quiet and prayer?

Methods of measurement:

- observation and feedback from the fraternity and ministry,
- self-evaluation and reflection papers,
- evaluation by director, staff and peers,
- review of monthly credit card and other expenditures
- group and faith sharing.

b) Postulancy goal 2: The postulant begins socialization in the Capuchin community, participates in fraternal life and service, continues vocational discernment, and grows in his identity with the Province and Order.

Means:

- living the daily life of the brotherhood,
- fraternity service and the responsibility for "home",
- fraternal colloquy and recreation,
- visits to other friaries and participation in provincial activities,
- reflections and workshops on community life, communication skills and strategies, fraternal correction and reconciliation,

- safe environment training with an emphasis on professional behavior and use of means of communications,
- studying the Constitutions,
- reading the lives of St. Francis and Capuchin saints,
- house chapters,
- communal penance service,
- evaluation sessions and feedback,
- spiritual direction,
- collaborative formation experiences with other provinces.

Questions for evaluation:

- Does he demonstrate positive motives for joining religious life?
- Does the postulant participate fully and positively in fraternal activities?
- Does he show and express sensitivity to friary and community needs?
- How does the postulant deal with issues of assertiveness, i.e., is he able to avoid both passive aggressive and aggressive behaviors?
- Do you notice signs of his being either overly compliant or rebellious in relation to authority?
- In relating to other members of the community does he tend to be overly dominant or overly dependent?
- Does he participate fully and transparently in house chapters and other community meetings?
- Is he beginning to identify with the community as "we"?
- Can he identify himself publicly as a member of the Capuchin community?
- Has he met regularly with a spiritual director, and how does he evaluate this experience?

Methods of measurement:

- observation and feedback from the local fraternity, ministries and social contacts
- evaluation by director, staff, and self,
- reflection papers and class work,
- fraternal group sharing.

c) Postulancy goal 3: The postulant deepens knowledge and practice of the Catholic faith, learns to think with the Church, and acquires basic skills for spiritual growth and personal and liturgical prayer.

Means:

- study, formal input, classes and workshops,
- group discussions,
- workshop and seminars,
- recollection days, retreats and renewal experiences,
- daily community liturgy, common prayer, confession, private meditation daily,
- modeling various prayer forms,

- participation in faith sharing,
- interaction with various groups, movements and activities in the church,
- experience of other religious and spiritual traditions.

Questions for evaluation:

Can the postulant articulate a basic knowledge and familiarity with the Catholic tradition?

Can he "think with the church" in relationship to the signs of the times?

Can he reflect on and dialogue positively with all dimensions, groups, and types of spirituality in the church?

How did he perform in the course of instruction given in postulancy?

Is he present, on time, and attentive at community prayer?

How does he employ Scripture, the Psalms and spiritual reading?

Does he manifest interest and leadership in liturgical prayer?

Does he report regular use of the Sacrament of Penance and spiritual direction?

Methods of measurement:

- studies, classes, workshops, exams, written reflections,
- observation, feedback and evaluation by community, staff, director,
- feedback from other brothers, fraternities, church groups and ministries.

d) Postulancy goal 4: The postulant grows in personal psychological maturity, takes initiative and responsibility for his formation, and practices the fraternal skills of correction, reconciliation and conflict resolution.

Means:

- personal responsibility for postulant program, work and ministry ,
- life in the fraternity and social group,
- interaction with people "different" from himself socially, politically and religiously,
- house chapters and other fraternity meetings,
- reflections and workshops on personality styles, communications, community life, fraternal correction, reconciliation, and conflict resolution,
- the three evaluation times and processes within the postulancy year,
- exploration of issues raised in psychological evaluation,
- discussion of such issues in spiritual direction and psychological counseling as necessary,
- dialogue with director, staff and community.

Questions for evaluation:

How well does he know himself and does he desire to grow in self-knowledge?

Is the postulant free of the need for long-term psychological counseling, indicating no serious mental, emotional or personality disorders?

Is he positive and peaceful in life?
Does he have difficulties with any impulsive behaviors, e.g., sex, substance use, anger?
How consistent is his behavior?
How faithful is he to commitments?
Does he achieve according to his potential?
Is there a correspondence between behavior and stated values and ideals?
Does he have an ability to own and express emotions and inner yearnings?
How does he function under stress, tension, and anxiety?
Can he make decisions and accept responsibility for those decisions?
Has he shown increasing initiative for his personal growth?
Is he open and flexible in his own world-view?
Can he respect and dialogue with others, with other points of view?
Does he take reasonable care of his health?
Does he interact with members of the fraternity with honesty, transparency, comfort and skill?
Does he take responsibility for the community as "we" and make choices to build up the community?

Methods of measurement:

- evaluation and report by counselor when necessary,
- observation and evaluation by community, director, staff, peers and self,
- review of postulant's use of social media communications
- reflections papers and class work.

e) Postulancy goal 5: The postulant learns the Christian and Franciscan traditions and practices of meditation and contemplation, chooses silence and interiority, and dedicates himself to contemplative prayer.

Means:

- a course in the theology of Catholic spirituality and prayer,
- a course in Franciscan and affective methods of spirituality and contemplation,
- greater emphasis on silence during the day,
- communal modeling of various forms of prayer,
- written reflection concerning prayer experiences (such as a prayer journal),
- participate in faith sharing,
- opportunities to verbally share ones spiritual journey,
- study of scripture and its use in prayer, especially the Psalms and Wisdom literature,
- longer periods of contemplation prayer, hermitage time.

Questions for evaluation:

Does the postulant report a deepening affective connection with the person of Christ in prayer (as opposed to merely engaging more skillfully in a technique or a pious practice)?

Can the postulant reflect on the tradition and methods of Franciscan contemplation, especially on the poor and humble Christ?

Can the postulant identify the "fruits" of his prayer, such as the changes that he sees or that he feels challenged to make in his own behavior as a result of his prayer?

Does his practice of prayer make him less self-focused and more aware of the Christ in others, especially his brothers and the poor?

Methods of measurement:

- observation,
- reflection papers and class work,
- group sharing,
- evaluation by self, director and staff.

f) Postulancy goal 6: The postulant understands and expresses the service dimension of his evangelical vocation, living in greater simplicity and solidarity with the poor among whom he lives and works.

Means:

- fraternal and volunteer service in the fraternity, community, church,
- shared ministry with the poor during the week,
- counter-cultural, trans-cultural and trans-lingual experiences,
- longer experiences with the poor,
- life-style consistent with austerity and poverty,
- ecological awareness and practice,
- discussion on poverty, simplicity, austerity and the use of money,
- house chapters on our life of poverty,
- reflections on a Biblical and Franciscan approach to poverty.

Questions for evaluation:

Is he faithful and responsible in his apostolic and fraternal service?

Does he consider the friary his home and thus care for it?

Does he demonstrate both poverty and minority in his relationship to others?

Does he approach the poor and marginalized as his brothers and teachers?

Does he serve the needy with an attitude of dignity and respect (as opposed to an attitude that reflects superiority toward those he serves)?

Does he manifest any difficulties with keeping boundaries in relationships with those he serves or with whom he serves?

Does the postulant demonstrate a growing ability to "let go" of reliance on things?

Is he able to distinguish between what he truly needs and what he wants (and the motives driving both needs and wants)?

Does he have an action plan to challenge his desires?

Does he take responsibility for the challenges of poverty (rather than blame others and leave the decisions to them)?

Does he exhibit integration through well-reasoned and value-based choices in leisure?

Methods of measurement:

-observation and feedback from people and communities served

-reflection papers and self-evaluation

-group sharing of ministerial experiences

-evaluation and feedback from ministry supervisors

-peer assessment and evaluation by director and staff.

3. Postulancy Program of Studies

I. Human Formation

A. Virtus/Praesidium workshop and training (fall)

B. Communication skills workshop (fall)

C. Transitions workshop (fall)

C. Health education, includes substance abuse (fall)

D. Family systems workshop

E. Personality workshops

F. Intimacy workshop (spring) includes: sexuality, intimacy, loneliness, relationships

II. Spiritual Formation

A. Liturgy workshop (Fall semester) includes:

1. Introduction to Liturgy (with *Sacrosanctum Concilium* and G.I.R.M.)

2. Liturgy of the Hours (structure, roles, planning and music)

3. Liturgy of the Eucharist (structure, roles, planning and music)

4. Lector training (initial and ongoing)

B. Introduction to Prayer and Meditation

1. *Catechism of the Catholic Church*, part IV: "Christian Prayer."

2. "Lectio Divina" and the traditions of Catholic Prayer

C. Introduction to Spiritual Direction (Fall semester)

III. Theological Formation

A. Catechesis of basic doctrine/dogma of faith (includes):

1. Faith, religion, theology, belief, Scripture (read *Dei Verbum*)
 2. The human condition: nature and grace, sin and redemption, human destiny
 3. God: Father (creation), Jesus Christ (read a life), Holy Spirit (spirituality)
 4. The Church (overview, *Lumen Gentium*, Consecrated Life in the Church)
 5. The sacraments (particular emphasis on Initiation and the Eucharist)
 6. Mary and the Church
- B. Faith Reflection on Experience

IV. Franciscan Formation

- A. Franciscan Lives of Saints (St. Francis, St. Clare, Capuchin Saints)
- B. Sources (critical-historical introduction) for the Life and Writings of St. Francis
- C. Introduction to Franciscan and Capuchin History
- D. Introduction to the Capuchin Constitutions
- E. History of the Province

4. Formation Gatherings

The directors of the various levels of initial formation will plan a yearly gathering of all the young men in initial formation, from postulancy through perpetual profession, in one or several settings as geography and circumstances dictate. The gathering will include dimensions of prayer, reflection, education, recreation and fraternal activities. The purpose of this time together is fraternal bonding, support and growth in brotherhood, vision and mission as the new generation of Capuchins in the Province.

C. NORTH AMERICAN PACIFIC CAPUCHIN CONFERENCE (NAPCC) PROGRAMS

1. Inter-provincial Postulancy Program (IPP)

As a preparation for the inter-provincial novitiate program of the NAPCC, the postulants participate in an 8-week inter-provincial postulancy program (IPP). The goal of this program is to form a bond of community among the postulants before they begin their common novitiate, so as to be able to enter more quickly, fully and peacefully into the life and rhythm of the novitiate. The director and staff of the IPP are chosen by the NAPCC provincial ministers. The IPP staff prepares and directs the program in close policy and program coordination with the novitiate staff.

At the beginning of the IPP program, the postulant director sends to the IPP staff a copy of the postulant's Behavioral Assessment Interview report, his spiritual autobiography, and his evaluations during the postulancy. These documents are then passed from the IPP staff to the novitiate staff. The IPP and novitiate staffs welcome specific comments and suggestions along with the postulancy evaluations to help them continue the formation begun in the postulancy.

2. NAPCC Common Novitiate

¹The novitiate is a period of more intense initiation and more profound experience of the Capuchin Franciscan gospel life in its fundamental demands. It requires a free and mature decision to try out our form of religious life.

²On the opening day of the novitiate, a rite shall be celebrated asking for the help of God so that the aims of this period may be achieved. It is fitting that the novices receive "the clothes of probation" on this occasion. This rite shall be carried out in the religious fraternity. A document is to be drawn up as a record of the beginning of the novitiate, which is the beginning of life in the Order.

³The process of initiation during the novitiate is based on the values of our consecrated life as known and lived in the light of the example of Christ, the gospel insights of Saint Francis, and the sound traditions of the Order.

⁴The rhythm of the novitiate shall be in harmony with the primary aspects of our religious life, particularly through a special experience of faith, contemplative prayer, life in brotherhood, contact with the poor, and hard work.

⁵The direction of the novices, under the authority of the ministers, is reserved to the novice master alone, who must be a professed brother of the Order in perpetual vows.

⁶In order to be valid, the novitiate must comprise twelve months spent in the novitiate community itself. The minister, with the consent of his council, determines when it begins and how it is conducted (Constitutions 31).

The Capuchin Province of Mid-American participates in the common novitiate of the NAPCC. This program is established by the NAPCC provincials and funded by the participating provinces. The provincials set the policies of the novitiate and choose the Novice Director and staff. The Novice Director and team develop the procedures for the novitiate and direct the program. Participating provinces accept their own novices to

send to the novitiate as well as approve their own applicants for temporary profession, based on the evaluations of the novitiate staff.

Individual provinces have a voice in the conduct of the IPP and Novitiate through their provincial minister, through their Provincial Director of Initial Formation, and through the NAPCC Oversight Committee for Initial Formation.

The Capuchin Province of Mid-America bases its understanding of and preparation for the novitiate on the above Capuchin *Constitutions*, well as on the cave experience of St. Francis, where he fell deeply in love with Christ and prepared to commit his entire life to Him

While the postulant is in the novitiate, his passing file is kept by the Provincial Director of Initial Formation. At the time of the novice's first profession, this file is passed on to the Post-Novitiate Director.

As soon as he is appointed, the formation advisor of the new novice facilitates a conversation (at the novitiate, by skype or some other means) between himself, the novice and his postulant director. This meeting or conversation provides for an important transition between the levels of formation, and helps the novice and his formation advisor to continue the human, spiritual and Capuchin growth that were important in the postulancy.

The Provincial Director of Initial Formation is the official liaison between the novitiate and the province for sending documents, receiving evaluations, or approving extraordinary novice's expenses. Serious problems that arise with a particular novice in the course of the year are brought to the attention of his Provincial Minister. If an immediate intervention or decision is necessary, the Novice Director is authorized to intervene and decide. Otherwise decisions in the case are made by the Provincial Minister.

Once a novice has been accepted by the Provincial Minister for the profession of temporary vows, with the consent of the Provincial Council, the brother himself, the Post-Novitiate Director and the Provincial Minister schedule the date and place of profession and plan the ceremony and the liturgy. The Rite of Temporary Profession is normally celebrated either within the Liturgy of the Eucharist or in conjunction with the Liturgy of the Hours (See Appendices J through M, related to temporary profession: Document of Temporary Profession, Freedom to Profess, Trust Agreement and General Durable Power of Attorney.)

[The IPP and Novitiate documents and programs of the NPACC can be found on the website at: napcc.net]

D. POST-NOVITIATE FORMATION

“After the Lord gave me some brothers, no one showed me what I had to do, but the Most High Himself revealed to me that I should live according to the pattern of the Holy Gospel” (Testament of St. Francis).

¹The post-novitiate, which begins with temporary profession and concludes with perpetual profession, is the third stage of initiation. During this period the brothers progress further in maturity and prepare themselves to make a definitive choice of the gospel life in our Order.

²Because of its essential reference to religious consecration and to perpetual profession, the journey of formation undertaken in the post-novitiate must be the same for all the brothers. Since the gospel life in brotherhood holds the primary place in our vocation, it must also be given priority during this period.

³The brothers are to be led into a living relationship with Christ, to be ever more conformed to Him, and to find their identity in Him. According to each one’s gifts of nature and grace, let them be introduced to a more profound study of Sacred Scripture, spiritual theology, liturgy, and the history and spirituality of the Order. Let them be initiated into the exercise of various forms of the apostolate and of work, including domestic work. As this process of initiation unfolds, their life and growth to maturity as persons shall always be taken into account (Constitutions 32).

Francis’ dream and desire of living and announcing the Gospel found expression in his response to the invitation of Jesus from the cross at San Damiano, “Francis, go, repair my house....” At first, Francis set out to physically repair churches, but in time he came to see these words had broader significance for him and his brothers. When he heard the Gospel read at the Church of the Portiuncula, calling him to go out to preach the Kingdom of God, taking nothing for his journey, Francis responded: “This is what I want, with all my heart!” and he committed himself to carry out this call to the fullest.

In the same way, Francis’ brother in post-novitiate formation clarifies and shapes his call to work and ministry within the Franciscan Gospel life. In prayer and reflection, in his experience of service and work, and through obedient dialogue with his directors and the provincial community, he discerns his personal call to serve the Order and the Church as a lay or priest brother. Accordingly, he commits himself to the development of his gifts of fraternal and apostolic service. In this last period of initial formation he both deepens his daily Capuchin life and prepares himself for his particular work or ministry.

The brother’s Capuchin formation, which is the same for all in the period of temporary vows, follows Francis’ pattern of leaving his father and the enticements of the world in order to embrace more deeply his heavenly Father and the gift of the brotherhood. Like the early brothers of Francis, the brothers in post-novitiate formation develop and

internalize the habits and virtues of community life and charity, supported by penance and the practices of the spiritual life. They integrate their prayer, their vowed life and various kinds of work and ministry in a fraternal Gospel life.

The desire to “rebuild my Church” impels the post-novices to train their minds and hearts and skills in the best way possible, according to the needs and requirements of the Province and Church, both before and continuing after their perpetual profession. They study and engage in ministry and work in the context of fraternity and in such a way as to “not extinguish the Spirit of prayer and devotion.”

This post-novitiate formation, therefore, prepares the brothers to witness to the love of God in fraternal communion and go out to “preach penance and peace” in deed and word, as lay friars and as priest friars, living the Gospel and building the Church of Jesus Christ.

1. Program

Post-novitiate formation for our life is divided into two dimensions in the *Capuchin Constitutions*. One is “Initiation into Our Life” (*Constitutions* 26-36) whose goal is full integration into the Capuchin life and the perpetual profession of vows. The other is “Formation for Work and Ministry” (*Constitutions* 37-40) whose goal is preparation and training for service and ministry in the Order and the Church. Both of these dimensions are part of “initial formation,” that period of time in which a brother is incorporated fully in the Order and prepares himself for his initial work and ministry assignment in the Order and Church. *

[“Ongoing Formation” in the *Constitutions* (41-44), the time after initial formation, is the continual conversion for every brother and his continual learning of ministerial skills for the entirety of the Capuchin life.]

The post-novitiate period of temporary vows lasts from three to six years, according to the *Constitutions* (34:2), or up to nine years by exception. “Formation for Work and Ministry” begins while a brother is in temporary vows and continues until his program of ministerial formation is complete, often after his perpetual profession of vows for lay brothers and always after perpetual profession for ordained brothers.

Post-novitiate formation in the Province is set up to meet both the individual and the group needs of the brothers in their years after novitiate. This includes growth in their Capuchin life, preparation for perpetual profession, discernment of their work and ministry, and preparation to serve the Order and Church.

***NOTE on the phrase “Formation for Work and Ministry.” “Work” and “the grace of working” in the Capuchin Constitutions refer to all the fraternal services and apostolic activities that express the brothers’ individual gifts and build up the fraternity and the Church, including the services of local, provincial and general “ministers.” However in Chapter II of the Constitutions and in this section of the Manual, “ministry” refers to the ministry of Orders, while “work” refers to various works that do not require clerical ordination: manual, educational, social, ecclesial, etc. Lay services in the Church are called “apostolic” work in the Constitutions.**

a. Initiation into Our Life.

” Those brothers to whom the Lord has given the grace of working may work faithfully and devotedly so that, while avoiding idleness, the enemy of the soul, they do not extinguish the Spirit of holy prayer and devotion, to which all temporal things must contribute” (1223 Rule, V).

The first period of post-novitiate formation, that of temporary vows, begins with a process of transition from the novitiate experience of formation to the post-novitiate community life and formation. Previous to temporary profession, after the novice’s second evaluation, the Post-Novitiate Director has met with the novice and his formation advisor to assess his continuing formation needs and his readiness to begin some studies and ministerial formation in the first year of temporary vows. The post-novitiate director meets with the brothers again, upon their arrival from the novitiate to the post-novitiate community, to plan or finalize the plans for profession and to begin the process of transition to and preparation for the post-novitiate year.

Full initiation into our life at perpetual profession is the principal goal of all the brothers in temporary vows. This formation for the consecrated life and Capuchin life is the same for all the brothers, whether they have chosen the lay brotherhood or the clerical state, and in whatever post-novitiate house of formation they live.

In the first year of temporary profession, the brothers generally live together in the same post-novitiate residence, for the sake of fraternal solidarity and group formation activities; but exceptions can be made in individual circumstances.

All brothers in temporary vows must fulfill a required program of studies, classes and apostolic experiences before perpetual profession. Some of these requirements are fulfilled in common, others individually. Common formation activities, besides classes and workshops, include regular prayer and community life, recollection days, and group reflections on Capuchin life, work and ministry. The brothers may fulfill their individual requirements in different manners and locations, including in connection with their preparation for work and ministry. (See “Program of Studies” at the end of this Post-Novitiate section.)

Two key elements of initiation into our life in **the first year of temporary vows** are the internalization and integration of Capuchin values within the daily routine of prayer and fraternity and work (academic, apostolic, fraternal, volunteer, etc.), and the discernment of and preparation for future work and ministry in the province, the Order and the Church.

Indeed growth in the Capuchin life is the work of all formation, initial and ongoing. But the first year after the novitiate is a critical time to find equilibrium among the various dimensions of the life and to establish patterns and choices that are foundational for one’s entire consecrated life.

If a brother has reached a reflected initial discernment of his call to brotherhood or priesthood, in dialogue with his Post-Novitiate Formation Director and the Provincial Minister, he may begin studies for his work and ministry in the first year of vows, including full-time studies. If however he needs more time for a solid discernment of work and ministry, he may study only part-time in the first year, or focus on those courses required for everyone in temporary vows, or choose studies and activities for his personal growth and discernment.

The discernment of work and ministry in the Province is based on three elements:

- a) The brother's sense of his own call to priesthood or lay brotherhood;
- b) His desires, experiences, gifts and abilities;
- c) The particular needs of the province.

Guided by these elements, the possibilities of work for the lay brother are initially broad and varied. His work can be fraternal service in the friary, province, or Order. His apostolic activities can be public or ecclesial activities of administration or education or social services. He can work in a skill or profession that he was proficient in before he came into the Order, or one that he learns within his initial formation program.

In an effort to match the gifts of the brother with the needs of the province, creativity and responsible dialogue on the part of both are necessary in the discernment process. Likewise the choices of educational and technical programs for the lay brother's preparation for work and apostolic services require open, honest and careful reflection.

The possibilities of ministry for the ordained brother are also guided by the above elements of discernment, but in addition by the nature of the priesthood. He must be capable and prepared to teach and preach, to direct community prayer and celebrate the Sacraments, to exercise public leadership in the community and Church.

The general formation for priestly ministry is determined by the Church's requirements for Orders, which guide the educational institutions and programs the Province uses for priesthood preparation. The Province can establish additional ministry preparation requirements for priesthood candidates, according to its desire for particular ministerial designations or specializations.

The work and ministry discernment process for all brothers includes reflection on work and ministry from an ecclesial and Capuchin perspective, as well as reflection

on the brother's work and ministry experiences and goals. (See Appendix P: Work and Ministry Training Discernment Process.)

At the end of the first year of temporary vows, all the brothers engage in an intentional discernment, or a confirmation of an earlier discernment, of their preparation for work and ministry. Along with the Post-Novitiate Director and Provincial Minister, they plan and choose programs of academic and technical preparation according to their work and ministry plan for the following years.

Those brothers who are pursuing work and apostolic service as lay brothers choose schools or institutes according to their program; those who are pursuing priestly ministry will study philosophy and theology at the schools used by the province. Priesthood students will generally study philosophy at St. John Vianney seminary in Denver, CO and theology at the Oblate School of Theology in San Antonio, TX.

Summer assignments for brothers both in temporary vows and in perpetual vows are work and ministry placements in the friaries, apostolates and ministries of the province, or further academic studies, work and ministry formation. These formation programs enhance the brother's area of concentration or specialization or allow him to prepare in important areas of life, work and ministry in the Province. Summer programs include a Spanish program, a Clinical Pastoral Experience, Franciscan Studies, or some other apostolic and ministerial training, for example spiritual direction.

Those brothers studying for the priesthood will fulfill some of their program's ministerial preparation requirements during the summers. To decide on his summer program, the brother meets and discusses his program with his Post-Novitiate Director who in turn presents the brother's request to the Provincial Minister for approval. (See Appendix Q: Summer Programs for Preparation for Work and Ministry.)

During the time of "initiation into our life" and "formation for our work and ministry," a brother usually remains in a post-novitiate fraternity. In given cases a brother can spend part of that time in another friary of the province, doing full-time work or ministry or continuing his work and ministry preparation under the direction of a local friar. In this case his formation program and process is to be developed and made explicit in the form of a contract (See Appendix R).

In all cases, the brother must spend his first year after novitiate in a post-novitiate fraternity.

Brothers in temporary vows live as full members of the community with all the rights and privileges except those of office and voting. They do not make their Last Will and Testament until perpetual profession and do not dispose of any personal property or savings until that time. During the period of temporary vows they do not

use any of those possessions, but follow the same financial processes and practices as all the brothers in the fraternity.

Evaluations are held twice a year during the time of temporary vows. The perpetually professed community evaluates the brothers in temporary vows. At appropriate times, the brothers' peers should be consulted and appropriate comments are to be included in their evaluations. The Post-Novitiate Director will share evaluations with each brother. A copy of the year-end evaluation is placed in both the official (provincial) and passing file.

A brother may not be dismissed or dispensed from temporary vows except by the General Minister and his council, according to the Capuchin Constitutions #36.

b. Profession of Our Life

“Through this consecration, in order to gather more abundant fruit from the grace of baptism, we bind ourselves to live out the gospel counsels in accordance with the Rule and Constitutions” (Constitutions 33:3).

When a brother is prepared to apply for perpetual profession, after a minimum of three years of temporary vows, he follows this process:

1. The Post-Novitiate Director meets with the brother in the fall of his third year of post-novitiate training to review his growth and his evaluations since the novitiate and to determine where the friar is relative to his profession of perpetual vows.
2. The brother begins at that time an extended period of discernment and preparation for perpetual profession, according to a plan coordinated with the Director.
3. After consulting with the Director, the brother, three months before his requested date of profession, writes a letter of petition to the Provincial Minister.
4. Shortly after that, the local community meets to evaluate the brother, in the presence of the Provincial Minister when possible, and gives its recommendation and consultative vote to the Provincial Minister.
5. The Provincial Minister meets with his council, reviews the formation evaluations and the recommendations of the brother's fraternity, and decides with the Council's consent upon the brother's request. The Provincial Minister then informs the brother as to whether or not he is accepted, and communicates his decision to the Post-Novitiate Director.

6. If the brother is not approved for perpetual profession, he can, according to his desire and the judgement of the Provincial Minister, either renew his temporary vows for a year while continuing his preparation for perpetual vows, or leave the Order when his temporary vows expire.

7. If the brother **is** accepted for perpetual profession, he arranges with the Post-Novitiate Director a program of spiritual preparation within these three months before his perpetual profession. This should include a formal retreat of at least one week.

The celebration of perpetual profession is planned in consultation with the Provincial Minister, who presides at the liturgy according to the prescribed ritual. Before the profession, the brother signs his Last Will and Testament. Within the rite of profession, in the presence of the Provincial Minister and two witnesses, he signs the profession document. These documents are filed in the provincial archives along with formation evaluations leading up to perpetual profession (See Appendices S and T). The book of the Gospel is the symbol used and given to the brother at perpetual profession.

“Initiation into Our Life,” according to the Constitutions, is finished at perpetual profession. “Initial Formation,” however, continues until clerical ordination for priests and the completion of their program of education and training for lay brothers. According to our principle of graduation in initial formation, Capuchin life for the brothers in solemn vows reflects more individual freedom and individual fraternal responsibilities than for brothers in temporary vows. Brothers in solemn vows exercise the fullest participation in House Chapters and community life and fulfill all the requirements of the *Constitutions* for brothers in perpetual vows.

Priesthood candidates, and lay brothers still in their work and apostolic preparation programs, remain in a post-novitiate formation house and under the supervision of a Formation Director. Priesthood candidates must have a priest for their spiritual director.

c. Formation for Work and Ministry

“Formation for work and ministry shall be planned in such a way that the brothers, in accordance with their talents and vocation, are sufficiently prepared for the duties and offices they will have to fulfill. Therefore some may learn skills and technical trades, while others engage in pastoral or technical studies, especially those of a sacred character. The greatest care shall be given to ensure that preparations for work and the apostolate is conducted in a true spirit of service, compatible with religious consecration, and in harmony with the journey of initiation, ensuring the primacy of life in brotherhood” (Constitutions 37:5-6).

Formation for work and ministry can take place in one of several friaries designated for post-novitiate formation. The residence of this phase of formation is largely determined by the location of the work and ministry preparation programs. The Post-Novitiate Director in each post-novitiate community directs the work and ministry formation programs for all the brothers in that house.

The course of studies and the training program for work and ministry formation is decided between the brother and the Post-Novitiate Director, in dialogue with the Provincial Minister, according to the work and ministry for which the brother is preparing.

1) Lay Track for Work Formation

Lay brothers in temporary or perpetual vows who are pursuing academic or vocational programs meet with the Post-Novitiate Director twice a year, and more often if necessary, to review and evaluate their program, and make any necessary changes and adjustments. They likewise decide with the Director, and have approved by the Provincial Minister, any province-based internships or summer placements within their work training program. (See Appendix Q: Summer Programs for Work and Ministry Preparation.)

The review and evaluation of their work and apostolic formation programs take into consideration the following factors:

- a) The fulfillment of the requirements of their program, both academic and practical;
- b) An evaluation of their training program by the director(s) of both the educational and the service components;
- c) Evaluative comments and feedback, where possible, from the people served in their work and apostolic training.

Other evaluative elements of the brother's program are his joy in work and apostolic services, his integration of his work and his fraternity life, and his ability to continue to grow in the Capuchin charism.

Changes to be made in the lay brother's work training program can be initiated both by the brother and by the Province (Post-Novitiate Director or Provincial Minister). For the lay brother in temporary vows, the Province requires that all the requirements for initiation into our life and perpetual profession are able to be fulfilled within his preparation for work and the apostolate (See Program of Studies at the end of this Post-Novitiate Formation section).

Once its formation purpose has been served, the “passing” file is sent to the provincial office where it will be destroyed after relevant documents are transferred to the permanent file. -

It is desirable for the brother and the Province to celebrate the brother’s graduation or completion of his program in a fraternal and suitable way.

2) Orders Track for Ministry Formation

Brothers pursuing Orders, in temporary or perpetual vows, must complete their preparation for the priesthood according to the guidelines and requirements for ordination set by the bishops of the United States. (See the *Program of Priestly Formation, or PPF.*) These brothers are also encouraged to take personal responsibility and initiative in choosing their studies and experiences in fulfilling those requirements. They are particularly encouraged to acquire greater skills in Spanish language, culture and ministry during their years of preparation. Their course of studies is worked out between the candidate for Orders, the Post-Novitiate Director, and the institution involved. (See Appendix U: Checklist for Theology Studies, Capuchin Province of Mid-America.)

The Post-Novitiate Directors guides and oversees the candidate for Holy Orders in requesting, fulfilling the requirements and preparing for the Ministries of Lector and Acolyte. The Province appoints a Commission on Ministries, including the Provincial Minister *ex officio*, the Post-Novitiate Director and at least one diocesan priest from the diocese where the candidates do their theology and ministry formation. This Commission assists the Province in a scrutiny of suitability and preparedness before each of the liturgical levels of Order and Ministries. The recommendations of the Commission are not binding on the Minister Provincial, but should be taken seriously by him.

The candidate requests the Ministries in writing to the Provincial Minister. The candidate and the Post-Novitiate Director then gather the documents required for the scrutiny of the given Ministry. (See Appendix V: Process, Requirements and Celebration for Ministries). The Post Novitiate Director convokes the Commission to review the documents and the candidate’s readiness for said Ministry, after which the Commission makes its recommendation to the Minister Provincial to proceed with the liturgical celebration.

The candidate helps plan the celebration of the Ministries. The Ministries are celebrated in a simple fraternal setting, such as at the annual retreat or assembly, or at the local friary or parish where the friar is living or working. A report of the each scrutiny and a document of the institution of Ministries are kept in the brother’s provincial file (Appendix V).

When the brother is ready to request the Order of Deacon, the following process is followed:

1. Having finished his program of theological and ministerial training according to the particular institution and in fulfillment of the requirements set by the United States Bishops (Appendix U), the brother makes known his request to the Post-Novitiate Director and writes a letter of request to the Provincial Minister, asking for ordination to the diaconate. (See Appendix W: Process of Admission to Diaconate, and Appendix X: Guidelines for Reports for Promotions to Orders.)
2. The Post-Novitiate Director presents to the Provincial Minister the pertinent documents, evaluations, and recommendations in these areas:
 - a) Intellectual Formation: academic reports from the brother's theology program, the results of an examination for priesthood or other proofs of academic readiness for priesthood required by the theology school, and any other pertinent information about the brother's intellectual formation.
 - b) Spiritual Formation: Evaluations from the brother's Formation Directors and the local communities where he lived during his theological and ministerial training, with information about his practice of prayer, spiritual observance, and life of virtue.
 - c) Pastoral Formation: ministry reports and evaluations from supervisors, peers, colleagues, and the people he has served in the ministries he has served during his pastoral and ministerial formation, as well as proofs for ministerial readiness for priesthood required by the theology school.
3. The Province's Commission for Orders and Ministries meets to review the above materials and the required documentation for Orders, and makes a recommendation of the brother for diaconate ordination, or some other recommendation, to the Provincial Minister (see Appendix W).
4. The Provincial Minister meets with the brother, reviews the reports and documentation and recommendation of the Commission of Orders and Ministries, and with the consent of his Provincial Council decides on the request.

5. The Provincial Minister, the brother and the Post-Novitiate Director together plan the diaconate ordination, along with the ordaining bishop.

If a brother is refused ordination by the Provincial Minister because of substantial weaknesses in his preparedness, he may re-apply again in one year, presuming he has addressed the reasons for his delay.

When the brother is ready to request the Order of Priesthood, the following process is followed:

1. Having successfully completed his diaconate program, the brother writes a letter of request to the Provincial Minister asking for ordination to the priesthood, and makes known his request to the Post-Novitiate Director.
2. The Post-Novitiate Director reviews the brother's diaconate experience, the evaluations from his ministry and supervisor, and any other pertinent information from his academic studies and ministerial experiences during his diaconate, and presents these reports to the Provincial Minister. These should include information as to his intellectual formation, spiritual formation, and pastoral formation as was required as part of his diaconate discernment.
3. The Province's Commission for Orders and Ministries meets to review the above materials and the required documentation for Orders, and makes a recommendation of the brother for priesthood ordination, or some other recommendation, to the Provincial Minister (see Appendix X).
4. The Provincial Minister meets with the brother to review his diaconate experience and his evaluations and reports and the recommendation of the Commission of Orders and Ministries. After obtaining the necessary documentation for priesthood ordination, he should obtain the consent of the Provincial Council relative to the brother's request for priesthood ordination. (see Appendix Y: Process of Admission to Priesthood).
5. The brother, the Post-Novitiate Director, and the Provincial Minister, along with the ordaining bishop, plan the priesthood ordination ceremony.

If a brother is refused ordination by the Provincial Minister because of substantial weaknesses in his preparedness, he may re-apply again in one year, presuming he has addressed the reasons for his delay.

Any evaluation reports and scrutinies generated for preparation for the Ministries, diaconate or priesthood are retained upon the brother's ordination in the permanent file. The scrutiny report should include the actual vote count and a brief summary of the discussion. Documents of ordination as well as documents with reasons supporting the refusal of ordination request are kept in the Provincial personnel file.

d. Work and Ministry Placement

When the brothers, lay and cleric alike, approach the completion of their work and ministry formation, the Provincial Minister and Post-Novitiate Director engage in a process of choosing a work or ministry placement for them as they begin full-time service in the province and Church. Three points of focus for this process are:

1. Choosing a healthy placement for the new worker or minister
2. Establishing a positive working relationship between the brother and his supervisor
3. Finding a good mentor for the worker or minister.

The Provincial Minister meets with the local fraternities and work or ministry supervisors that are being considered for the brother's placement to discuss the necessary support and supervision needed by the brother. The brother in turn is asked to consider a mentor from among the possibilities in the geographical area of his assignment.

Once the assignment has been made, the new worker or minister, in dialogue with the Post- Novitiate Director, chooses a qualified mentor and begins the mentor relationship that is to last at least one year. The Post-Novitiate Director assists the mentor and new worker or minister in their relationship and program. (See Appendix Z: Work and Ministry Placement and Mentor.)

2. Post-novitiate goals, means, methods of measurement

a) Post-novitiate Goal 1: The brother should deepen his spiritual life as he prepares for perpetual profession.

During this period the brothers progress further in maturity and prepare themselves to make a definitive choice of the gospel life in our Order (Constitutions 32:1).

Means:

- daily personal prayer, communal liturgy and prayer,
- retreats, renewal experiences, hermitage days, spiritual direction,
- daily life in the friary and province,
- group reflections on life,
- group discussions on Franciscan and Capuchin spirituality,
- directed reading, study on religious and vowed life,
- regular meetings with formation director,
- Sacrament of Penance.

Criteria for evaluation:

Describe his attitude toward personal and communal prayer, liturgy.
 Does he personally choose to use and create solitude and hermitage time?
 Does he explore serious concerns and discernment with his spiritual director?
 What is the quality of his participation in discussions and reflections on life?
 How does he communicate his needs to his brothers and respond to their needs?
 What are your perceptions of his approach to intimacy in relationships?
 How does he negotiate the demands of obedience with brothers and ministers?
 How does he handle money and make personal choices in keeping with the vow of poverty?
 Does he regularly take advantage of the Sacrament of Penance.?

Methods of measurement:

- evaluation by director, community, peers, self,
- class work and reflective papers,
- dialogue with brother about use of money and use of social media
- informal feedback from broader community.

b) **Post-novitiate Goal 2: The brother should assume ownership of personal, spiritual, Capuchin-Franciscan, and ministerial growth within community.**

¹Called as we are to the gospel life by one and the same religious vocation, all of us, in imitation of Saint Francis and following Capuchin tradition, are bound to express the apostolic nature of our vocation by the witness of our life in all the assignments we undertake in obedience and brotherly communion.

³Indeed, it is difficult to do any work properly without special and suitable formation.

⁴It is the duty of the Order to help every brother to develop his own "grace of working," because it is by working that the brothers support one another in their vocation and strengthen the harmony of their life in brotherhood (Constitutions 37:1-4).

Means:

- discernment, with director and community, of gifts and talents as they relate to his future,
- setting personal goals, in dialogue with director and community,
- individualized programs, with greater personal involvement and initiative,
- individual contracts,
- regular spiritual direction,
- increased personal responsibility and decreased dependence on formation director in later years of post-novitiate formation,
- a period of time during temporary profession living outside a formation house.

Criteria for evaluation:

Describe the quality of his self-confidence.

How effectively does he express his ideas, thoughts, feelings, and needs?

Give examples of how he exercises personal responsibility and prudence.

Is he overly dependent upon or independent from the community in personal choices and actions?

How would you describe the quality of his relationships inside and outside the fraternity? What are signs that his values are consistent and internalized?

How accurately and realistically does he articulate personal goals?

How does he critique himself and learn from personal experience? Does he regularly achieve according to his ability?

Methods of measurement:

- evaluations: self, director, fraternity, peers,
- discernment programs for work and ministry,
- work and ministry supervisors' evaluation.

c) Post-novitiate Goal 3: The brother should develop and use personal gifts and talents in the service of fraternity and Church.

⁵Formation for work and ministry shall be planned in such a way that the brothers, in accordance with their talents and vocation, are sufficiently prepared for the duties and offices they will have to fulfill. Therefore some may learn skills and technical trades, while others engage in pastoral or technical studies, especially those of a sacred character.

⁶The greatest care shall be taken to ensure that preparation for work and the apostolate is conducted in a true spirit of service, compatible with religious consecration, and in harmony with the journey of initiation, ensuring the primacy of life in brotherhood (Constitutions 37:5-6).

Means:

- classes in theology of work and ministry,
- participation in ministry preparation programs according to the ministry being undertaken,
- supervised work and ministries, internal and external, clinical pastoral education,
- group reflection on the theology of ministry and personal ministry experiences,
- regular ministry and fraternal service during initial formation,
- time spent within Province ministries,
- input by members of the Province on their ministry.

Criteria for evaluation:

What evidence does the brother give of skills for fruitful work and ministry?

What would indicate that he uses and develops gifts and talents to his potential?

Has he successfully completed or is he completing his education or training program?

What are some indications that he can relate to people in a responsible, warm, human way?

How does he articulate a personal theology of work and ministry consistent with the Order and Church?

Has he completed the academic and ministerial requirements and given evidence of the ability to function effectively in work and ministry?

In what ways does he offer his personal talents and use his unique gifts in fraternal service?

Methods of measurement:

- evaluations: self, peers, community, director, and ministry supervisors,
- successful completion of a course or work for a program,
- recommendation from work and ministry training program,
- acceptance for work assignment, ministry assignment, Orders.

d) Post-novitiate Goal 4: The brother should integrate work and ministry and work and ministry preparation into the life of gospel brotherhood.

Because of its essential reference to religious consecration and to perpetual profession, the journey of formation undertaken in the post-novitiate must be the same for all the brothers. Since the gospel life in brotherhood holds the primary place in our vocation, it must also be given priority during this period (Constitutions 32:2).

Means:

- daily life of fraternity vis-à-vis the work and ministry or work and ministry preparation,

- group reflection on Franciscan living in varying contexts,
- group reflections on tensions between life and work and ministry,
- fraternal service.

Criteria for evaluation:

How does the brother demonstrate by choices the priority of Capuchin life as he ministers or prepares for work and ministry?

How does he engage in dialogue with others and articulate tensions?

How does he maintain his prayer life in balance with work and ministry?

What are signs that he takes responsibility for fraternal services?

What are some indications that he ministers with a sense of poverty and personal minority?

Methods of measurement:

- evaluation by self, peers, community, director, and work or ministry or academic supervisors,
- community feedback and observation.

3. Post-Novitiate Program of Studies

A) Requirements within Initial Formation

All brothers, lay and clerical, must complete courses or studies in the following areas by the end of their initial formation.

- INTRODUCTION TO SACRED SCRIPTURE
- General Introduction to Theology
- ECCLESIOLOGY
- CHRISTOLOGY
- MORAL THEOLOGY
- Theology of the Eucharist
- Pastoral Theology
- Spanish Studies (as necessary): 2 semesters/classes and a summer Spanish immersion program

When possible, the courses in CAPITAL letters should be taken before the profession of perpetual vows. Brothers in the Orders Track for Ministry Formation will generally take these required classes, except Spanish, within the normal program of their theological institute. Brothers in the Lay Track for Work

Formation must include these classes within their program of studies. The amount of study in these classes should be equivalent to a 3 credit undergraduate course. These may be taken for credit or audited in schools or institutes, and they may also be fulfilled through online and independent studies, as arranged for and/or approved by the Post-Novitiate Director.

B) Other Courses and Studies in Post-Novitiate Formation

Other requirements for studies in Post-Novitiate Formation, both for the Capuchin Life and for Work and Ministry, are fulfilled either through classes and studies in the educational institutions or through in-house courses, seminars, etc. These studies are divided into four areas, with the first area being most important in the first year of temporary vows and the other materials to be covered throughout the period of initial formation. Some in-house courses or seminars can be taught on a three-year cycle structure, so that all the brothers could get the same material over the period of their temporary vows. This is particularly true for Franciscan studies, which typically will not be available at institutions except in summer programs.

I) Formation for Discernment and Decision-Making

- Spiritual direction, self-knowledge, discernment
- Virtues of a balanced Capuchin life: priorities, prudence, peace
- Dimensions of celibacy and intimacy in fraternity and ministry
- Theology of Work and Ministry

II) Formation for Liturgical Leadership

- Principles and requirements of good liturgical prayer
- Practice of liturgical leadership in fraternity and ministries
- “Music practice” for good liturgy

III) Formation for Evangelization and Social Justice

- Social media and evangelization
- Social encyclicals of the Church
- Multi-cultural dynamics of fraternity and ministry
- Spanish Studies (required within initial formation – see above)

IV) Formation in Franciscanism

- Capuchin-Franciscan approaches to work and ministry

- The Secular Franciscan Order (knowledge and fraternal interactions)
- Contemporary themes in Franciscanism
- Franciscan Capuchin authors/writings (e.g. Bonaventure, Lawrence)

PART THREE: SUMMARY OF POLICIES AND PROCEDURES

I. Admissions.

A. College Seminary Candidate Program.

Preliminary requirements include the documents needed for the college (seminary), two letters of recommendation (one from the candidate's pastor), and acceptance by the Vocation Director. The candidate must be a high school graduate or of equivalent age, and he applies prior to the beginning of a semester.

B. Resident Candidate Program.

Preliminary requirements include a letter of request, two letters of recommendation (including one from Candidate's pastor), a letter from the seminary rector (if applicable), an in-depth Behavioral Assessment interview report, and a letter of request from the Vocation Director to the local Guardian.

C. Non-Resident (Contract) Candidate Program

Preliminary requirements include a letter of request from the candidate, two letters of recommendation (one from his pastor), and a contract between the candidate, his director, and the Vocation Director. The candidate may apply at any time if he is a high school graduate or of equivalent age. The Vocation Director admits the candidate into the program.

D. Postulant Program.

Preliminary requirements include a letter of request from the candidate to the provincial minister, a written recommendation from his program director in consultation with the local fraternity or the recommendation from the seminary staff, completion of three months of candidacy, ecclesiastical documents, and medical, academic and psychological reports, including a background questionnaire concerning sexual misconduct and a review of the candidate's social media use. A criminal background check is also required. Evidence of an inclination to sexual activity with a minor disqualifies an applicant. With regard to same-sex experiences and/or inclinations the guidance of the Constitutions and Canon Law are followed. The Province admission board is appointed by the Provincial Council. The Postulant Director and a non-formation director should be among the members. The board evaluates and recommends the candidate to the Provincial Minister, who alone accepts the candidate. Postulancy begins in mid-July; application must be made early enough to allow adequate time for the admission process.

E. Novitiate Program.

Preliminary requirements include the completion of postulancy and the requirements of the Constitutions #18 and Church law, a letter of request to the Provincial Minister, and an evaluation report from the postulant director and his community. The candidate applies in April, allowing enough time to be accepted by May 1 and prepare for the Inter-provincial Postulancy Program the end of May. The Provincial Minister in consultation with his Council admits the candidate to the novitiate.

F. Profession of Vows.

Preliminary requirements include the fulfillment of the novitiate (for temporary profession), or at least three years of temporary vows (for perpetual profession), and a letter of request for vows to the Provincial Minister. The candidate for perpetual profession should apply at least three months before his requested date of profession. The Provincial Minister with the consent of his council admits the candidate for vows.

G. Ministries and Ordination

Preliminary requirements for Ministries, Diaconate and Priesthood ordination include those of Church Law, of the U.S. Bishops, the educational institution, and the Province. The candidate must be at least twenty-five years old for priesthood ordination. The Post-Novitiate Director and local fraternity, or fraternities, present the candidate to the Commission on Orders and Ministries and to the Provincial Minister and his council, who in turn present him to the bishop.

II. Finances

A. College Seminary Candidate Program.

The student pays his own tuition and school costs. Loans are possible from the Province, and are managed by the Province during initial formation. If the candidate makes perpetual vows, the Province assumes the loans. If the candidate leaves before perpetual vows, he reimburses the Province in full. Some scholarship grants are also available for college seminary students.

B. Resident Candidate Program

Participants in the Resident Candidate are expected to acquire paying jobs to contribute to the costs of the house, as well as pay off any remaining non-educational, personal debts in preparation for their application to the postulancy. They remain on their parents' or some other medical insurance policy if possible; if not, they are placed on the Province's policy

C. Non-Resident Candidate Program.

Any costs of the program are included within the budget of the Vocation Director.

D. Postulant Program.

The Province agrees to make the payments on any education loans the postulant may have. All other loans are to be paid off by the end of postulancy. The postulants remain on their parents' or another medical insurance if possible; if not they are enrolled in the province's insurance program. All ordinary expenses are taken care of by the community, and the community receives a formation subsidy from the province. Any gifts, stipends or salaries earned by the postulants are contributed to the community for the costs of postulancy and the house.

E. Novitiate Program.

The Province continues to make payment on the education loans, and enrolls the novice in the provincial insurance program. Ordinary novitiate expenses are covered by the NAPCC common novitiate; extraordinary novices' expenses must be approved and are paid for by the province.

F. Post-Novitiate Formation.

The Province continues to make payment on the education loans, and provides all the living, medical and educational costs of the brothers. The province provides a subsidy to supplement the local community for the formation costs of those in post-novitiate formation.

III. Contracts

A. College Seminary Candidate Program.

An agreement to abide by the conditions of the Seminary program is considered an implicit contract. During the time of this program, a student loan may be contracted with the Province.

B. Resident Candidate Program.

The formation plan as agreed on between the candidate and the Vocation Director is an implicit contract and conditions for the residence of the candidate in the friary.

C. Non-Resident Candidate Program.

The candidate, his director and the Vocation Director work out a contract to cover the requirements of the program. This contract is considered a spiritual agreement.

D. Postulant Program.

The Province continues to make payment on the postulant's education loans. The postulant agrees to reimburse the Province if he decides to leave or is dismissed.

E. Novitiate Program.

The Province continues to make payment on the novice's education loans. The novice agrees to reimburse the Province if he decides to leave or is dismissed.

F. Post-Novitiate Formation.

If the brother spends a period of time away from the post-novitiate friary, the brother, his local director and the Post-Novitiate Director draw up a contract spelling out his formation.

IV. Evaluations

A. College Seminary Candidate Program

An evaluation of the candidate is formally conducted once a semester by the Seminary staff. The Vocation Director discusses each evaluation with the candidate. He also writes a year-end evaluation, which is placed in the candidate's passing file along with the Seminary's evaluation reports.

B. Resident Candidate Program

The candidate is formally evaluated by the director and local friar community twice a year, in December and in April. Other evaluations are ongoing, including from people in the community who interact with the candidates or are served by them. The final evaluation is part of the candidate's application to postulancy.

C. Non-Resident Candidate Program.

The Vocation Director, in dialogue with the contact friar or director, regularly evaluates the candidate. This evaluation is made known to the candidate. The Vocation Director reports all evaluations and includes a written evaluation at the end of the program in the candidate's passing file.

C. Postulant Program

The Postulant Director and community formally conduct an evaluation of the postulant three times a year, and the director reports each evaluation to the postulant. A year-end evaluation is sent to the Provincial Minister and a copy is placed in the passing file.

D. Novitiate Program.

The NAPCC Novice Director and the local fraternity formally conduct an evaluation of the novice three times a year. The formation advisor reports each evaluation to the novice, and the written evaluation is sent to the Provincial and the Province Director of Initial Formation. The final evaluation is written for the provincial file and the passing file. The Provincial Minister informs the novice of the decision for profession.

E. Post-Novitiate Preparation for Vows.

The Post-Novitiate Director and local fraternity formally conduct an evaluation of the brother twice a year. The director reports each evaluation to the brother. The year-end evaluation each year is written for the provincial file and the passing file.

F. Post-Novitiate Preparation for Ministries and Orders

An evaluation is obtained from the ministry supervisor of each ministry the brother engages in. Prior to Ministries and Orders, the Post-Novitiate Director gathers and sends to the Provincial Minister and his council the various recommendations and evaluations from the local fraternities, ministry supervisors and educational institutions, including the priesthood exam and the recommendations of the Commission for Orders and Ministries.

V. Passages

At each level of transition from one formation program to another, the two directors meet (even long-distance "meetings") with the candidate to facilitate the transition, provide continuity in the personal development and growth of the candidate, and to lay a good foundation for formation at the next level. The directors and candidate in particular discuss his strengths, weaknesses, areas of growth, and ongoing formation needs from the previous level, as well as practical ways to meet those needs.

A. College Seminary Candidate Program.

Once the Vocation Director and Seminary staff accepts the candidate, he is a member of the program. There is no formal celebration of passage at this level.

B. Resident Candidate Program.

Once the Admissions Committee accepts the candidate to the residency program, he is a member of the house. There is no formal celebration of passage at this level.

C. Non-Resident Candidate Program.

Once the Vocation Director and Guardian accept the candidate, he is a member of the program. There is no formal celebration of passage at this level.

D. Postulant Program.

The Vocation Director coordinates the application process for postulancy. This includes all the required documentation needed for admissions to postulancy and a letter of request to the Provincial Minister. The immediate preparation includes a retreat or period of recollection. The liturgical ceremony is celebrated by the Provincial Minister and includes the signing of a document of entrance into postulancy, which is placed in the provincial file. The symbol for the rite and the year of postulancy is the Tau cross.

E. Novitiate Program.

The liturgy for investiture is planned by the NAPCC novitiate staff and presided by the Novice Director. The symbol of the investiture is the habit of probation. The Provincial Minister or his delegate participates in the liturgy and celebration.

F. Profession of Vows.

The novice before profession signs the documents of "freedom" and "use". The Provincial or his delegate, the Post-Novitiate Director and the novices plan the prescribed rite of profession. During the rite of profession the novice, Provincial Minister and witnesses sign the document of profession, to be filed in the provincial archives. The symbols of this rite are the profession habit and the Constitutions.

The brother requesting perpetual profession must state his intentions by March 1 of that year. In the spring or summer he makes a week's retreat in preparation for perpetual vows. The brother, the Post-Novitiate Director and the Provincial Minister plan the liturgical ceremony. The prescribed rite is presided over by the Provincial Minister. The symbol for the rite is the book of the gospels. A last will and testament is drawn up and a document of profession is signed, both filed in the provincial personnel file.

G. Completion and Celebration of Lay Brother's Formation for Work

When a lay brother has finished the academic, technical and experiential requirements of his program, he and the Post-Novitiate Director plan a celebration of his completion of his Formation for Work. This may include some kind of graduation from the educational institution, or a celebration of completing an apprenticeship or field experience. It should always include a fraternal celebration and recognition of the brother's achievement.

The Formation Director also decides which documents generated because of the brother's Formation for Work are to be destroyed, and which are to be passed on the brother's permanent provincial file.

H. Holy Orders

The candidate for Orders, in perpetual vows, requests the Ministries of Lector and Acolyte from the Provincial Minister. After a meeting of the Commission on Orders and Ministries, the Minister decides on the request. The Minister or his delegate presides over a simple liturgical service in a fraternal or local ministry setting.

The Post-Novitiate Director oversees the process of preparation for diaconate and priesthood ordination. This includes meeting the requirements of the U.S. Bishops; gathering the necessary academic documents, theology school evaluations and ministry recommendations, including an examination on the readiness of the brother for Orders; and a meeting of the Commission on Orders and Ministries. The Provincial Minister reviews all the reports, meets with the brother, and decides on his request. The brother, the Post-Novitiate Director, the Provincial Minister and the Bishop plan the ordination rite itself.

VI. Vacations and Family Visits

A. Candidacy

Candidates in a College Seminary Program follow the vacation and family visiting policy of the seminary. Candidates in the Resident Candidacy Program visit with their family or receive visitors according an agreement with their Director, and they do go home for Christmas. Vacation before the novitiate varies according to the circumstances of the candidate, but it is for at least two weeks.

B. Postulants

Postulants may have family visits once each semester, they go home for a week in early January, and they take a two-week vacation in May between the postulancy and the Inter-Provincial Postulancy Program (IPP). Home visits for baptisms, weddings and funerals are normally limited to members of the immediate family in postulancy and the IPP program.

C. Novices

Novices remain at the NAPCC common novitiate the whole year without home visits, except for weddings and funerals for immediate family members. Their families may visit them twice during the year, between October 31 and May 31. Novices may also attend Chapters and assemblies within their own jurisdiction. In Mid-America, the novices take a two-week vacation in August after their profession of temporary vows.

D. Post-Novices

Brothers in post-novitiate formation normally remain in the fraternity for Christmas and Easter, and usually take their annual vacation in the summer time,

according to a schedule worked out with their Formation Director and/or Guardian. Other visits with their families are worked out on an individual basis.

VII. Incidents of Sexual Abuse

A. Province Policy

All friars, employees and volunteers of the Capuchin Province of Mid-America – including all candidates, postulants, novices and friars affected by this Plan of Initial Formation – are required to accept and follow the *Provincial Policy for Protecting Children, Youth, and Vulnerable Adults and Addressing Any Misconduct with Adults*. This *Policy* directs the response of the formation programs and Province to any incidents of sexual abuse.

B. Admissions

A candidate who has a history of sexual misconduct with minors cannot be accepted to the postulancy. One who has an addiction or regular practice of pornography or sexual relations (homosexual or heterosexual) must be free of those addictions and practices for two years before applying

C. Dismissals

For dismissals because of sexual abuse or misconduct, see “VIII. Dismissals” below, section H.

VIII. Dismissals.

A. College Seminary Candidate Program.

The Seminary Rector in consultation with his staff may dismiss the candidate. The process involves a staff evaluation, talking with the candidate and informing the province Vocation Director, who in turns informs the Provincial Minister, who informs the Province.

B. Resident Candidate Program

The Guardian and Vocation Director of the resident candidate program, in consultation with the Provincial Minister, may dismiss candidates from the program for serious reason. The Provincial Minister then informs the Province.

C. Non-Resident Candidate Program.

The Vocation Director in consultation with the contact friar or personal director may dismiss the candidate. The Vocation Director then informs the Provincial Minister, who informs the Province.

D. Postulant Program.

For the dismissal of a postulant, the postulancy director presents the reasons and request to the Provincial Minister. The authority for dismissal rests with the Provincial Minister or, in extreme situations, others mentioned in the Constitutions 20 and 36. The Provincial Minister informs the Province of the dismissal.

E. Novitiate Program.

In the case of a serious reason or situation, the Novice Director of the NAPCC in consultation with his staff, requests the Provincial Minister of a particular novice to dismiss him. In case of serious scandal or physical danger, the Novice Director may have the novice removed from the novitiate. The authority for dismissal rests with the Provincial Minister or, in extreme situations, others mentioned in the Constitutions, 20 and 36. The Provincial Minister informs the Province of the dismissal

F. Post-Novitiate (Vows).

If just causes are present, when a brother's temporary profession has expired, the Provincial Minister can exclude him from making a subsequent profession after listening to his council (Canon 689). For a just cause, a brother in temporary vows may be dismissed according to Canons 694-704. The Provincial Minister informs the Province of the dismissal.

G. Post-Novitiate (Orders)

The Provincial minister with the consent of his council, after reviewing the recommendations and evaluations, can deny the brother's request for Orders. The Provincial Minister informs the Province whether the denial is temporary or final.

H. Incidents of Sexual Abuse for All Levels of Formation (refer to the Province Policy)

1. A Resident Candidate, Postulant, Novice or brother in temporary vows who abuses a minor cannot be permitted to continue and will be reported to the proper church and civil authorities.

2. A Resident Candidate, Postulant, Novice or brother in temporary vows who is unable to maintain appropriate boundaries with minors, despite clear guidelines and instruction, cannot be permitted to continue.

3. Concerning the issue of serious past offenses that come to light, a Resident Candidate, Postulant, Novice or brother in temporary vows who has abused a minor cannot be permitted to continue.

IX. Readmissions.

A. College Seminary Candidate Program.

The waiting period for readmission is one semester for one who voluntarily leaves the program and two years for one who is dismissed. The process for readmission is the same as the initial application process.

B. Resident Candidate Program

The waiting period for readmissions is one year for one who voluntarily leaves and two years for one who has been dismissed. In the case of a dismissal, readmission is dependent upon the candidate's successfully changing the behavior precipitating the dismissal.

C. Non-Resident Candidate Program.

The waiting period for readmissions is six months for one who voluntarily leaves the program and two years for one who is dismissed. The process for readmission is the same as the initial application process.

D. Postulant Program.

The waiting period for readmission is one year for one who voluntarily leaves the program and two years for one who is dismissed. The process for readmission is the same as the initial application process, with evaluations and reasons for leaving or dismissal taken into account.

E. Novitiate Program.

The waiting period for readmission is two years for one who voluntarily leaves the program and two years for one who is dismissed. The process for readmission is on an individual basis.

F. Temporary Vows.

The waiting period for readmission is two years for one who voluntarily leaves the program and two years for one who is dismissed. If a brother renews his temporary vows after three years, he may apply for perpetual vows in one year. A repeat of the novitiate is not required. A time of testing prior to again taking vows is determined for each individual situation, with permission of the General Minister.

G. Orders.

If the brother's request for Orders has been denied, he must wait one year to reapply. The evaluations of that year are taken into consideration when the brother again requests Orders

X. Severance Policies

1. Generally a man in formation who decides to leave or is asked to leave does so within three days. It is not recommended that he take up residence in another friary.
2. The one leaving is offered continuous medical insurance according to Provincial policy. Additionally, he is provided with enough financial aid for one month, including rent, food and other necessities. (The amount is not to exceed \$1,500, and for the individual who has sufficient means a stipend of \$500 is given).
3. Generally, one should leave with what he brought, and not be offered any community property. He should also take all his personal belongings, and not leave any of them in storage at the friary.
4. Changes and exceptions to these policies, for pastoral considerations, should be made in consultation with the Provincial Minister.

PART FOUR: FORMATION COUNCIL

I. ORGANIZATION, MEMBERSHIP AND MEETINGS

The Formation Council is an advisory body to the Provincial Council for proposing, planning, directing and evaluating the initial formation and ministerial training programs of the Capuchin Province of Mid-America. It advises and answers to the Provincial Council through its chair, the Director of Initial Formation.

The members of the Formation Council are the Director of Initial Formation (chair) and the directors of each of the levels of initial formation: the Vocation Director, the Postulant Director, and the Post-Novitiate Director(s). The Provincial Council usually appoints another friar from outside formation ministry to the council. The council may also include a friar from another province.

The Formation Council meets two or three times a year, for a period of 2-3 days, for the review and development of initial formation programs, and for the mutual support and growth of its members. Meetings include a discussion of the people and programs at various levels of formation, ongoing professional development of the members (with guest speakers, workshops, discussions of books/articles, etc.), and celebration together with prayer and meals.

Friars from the Province, including friars in initial formation, may be invited to be observers at council meetings. They may attend sessions of the meeting only after the review of each level of formation, to protect any confidential information shared about the men in formation.

The Council is also responsible for keeping the province as well informed as possible on formation programs, the entrances and exits and passages of candidates and friars in initial formation, and other matters of concern to the province membership. This communication is officially done at Provincial Chapters and other provincial assemblies, and may be prudently shared in other fraternal settings for the good of the brothers in formation and the formation programs.

II. DIRECTOR OF INITIAL FORMATION

The Provincial Council appoints the Province Formation Director at the beginning of each triennium. The following are the job responsibilities of the Province Formation Director:

- A. Initiates the meetings of the Province Formation Council, prepares an agenda for those meetings, and is chairperson for the Council,
- B. Reports to the Provincial Minister and the Provincial Council a summary of the business discussed by the Formation Council, especially items which need the attention and/or approval of the Provincial Council,
- C. Serves as ex officio member of the Admissions Board for the Province,
- D. Visits all those at each level of formation once a year,
- E. Meets with the Capuchin Formation Directors of the provinces of North America to discuss and plan business at that level,
- F. Prepares and submits a budget for all expenses incurred by the Formation Council and other activities which involve all levels of formation.

III. WORKING POLICIES OF THE FORMATION COUNCIL

- A. Recommendations for Replacement of Formation Personnel. These are policy ideals to be followed as closely as possible.
 - 1. The Provincial Council should consult the Formation Council about formation personnel assignments.

2. There should be a minimum of six months of preparation time for a friar assigned to be the director of the postulancy program, the novitiate program, or the post-novitiate program. Other formation personnel should also have adequate preparation time.

3. A friar should be assigned as director of a specific formation program for no more than six years.

4. There should be no more than one change among the directors of the postulancy program, novitiate program, and post-novitiate program in any given year.

B. Recommendations for Formation Communities

The Formation Council also makes recommendations to the Provincial Council concerning the makeup of the local formation communities. This is to help ensure a good working relationship among the brothers of the professed community and the right personnel to accompany the formandi. (See Appendix A: Requirements of Personal for a Formation Community.)

C. Spiritual Directors in Formation Programs

1. Criteria for Directors

- a. Be trained and sufficiently experienced in spiritual direction for men in religious formation. (The training should generally include a degree in theology, and preferably some study and experience in direction. A new director, without experience, should be under the supervision of a mentor.)
- b. For a first-time director with Province, meet with the formator for an orientation to the philosophy and goals of the program.
- c. Be committed to regular (i.e. monthly) meetings with the directee.
- d. Be willing to give a report to the formator on the directee's attendance at spiritual direction meetings.

2. Criteria for Directees

- a. Select a director from the approved list and discuss and arrange direction with him or her. (Lists may be specific to levels of formation, and directors not currently on the approved list would need to be approved by the provincial minister.)
- b. Meet regularly (i.e. monthly) with the director.

- c. Reflect with the formator on their practice of spiritual direction. (The directee is also encouraged to share and talk about his formation evaluations with his spiritual director).
- d. Offer a donation in gratitude to and support for the director and/or his or her institution.

3. Approved Lists

- a. The Formation Council will help compose present a list of spiritual directors for initial formation.
- b. This list can contain any priest, deacon, religious or lay person who fulfills the criteria above. (Spiritual directors for those in priestly formation must be priests, according to the document *Program for Priestly Formation*.)

APPENDIX A: QUALITIES OF A FORMATION COMMUNITY

Formation takes place in fraternity. This is true for us just as it was for Jesus and his disciples, for Francis and his brothers. The brothers of the local community enhance the formation of the young men by their good example of Capuchin life and by their positive support of the philosophy and activities of the formation programs. The local community can also detract from formation by their lack of support for it and by their bad example.

Brothers aren't perfect. Indeed sometimes the young men can be positively affected by the manner in which brothers and communities struggle with weaknesses and commit themselves to ongoing conversion. But those same brothers need to be committed to cooperate with the goals and processes of formation in the houses where they live.

This support and cooperation is necessary at all levels of formation, but it is particularly critical at the earliest stages, where the postulants and novices need good, strong examples of the Capuchin-Franciscan values they are trying to understand and appropriate.

Practically this means that the formation team – the director and his assistant(s) – must have a positive working relationship with all the brothers in the fraternity, and that the brothers upon being assigned to a formation house must agree to support the program, as directed by the formation team, in word and in deed.

Because the life of the fraternity is even more formative than the intellectual insights and ministerial experiences of the brothers, certain concrete practices must be observed by all the members of the community. These include

participation in the common prayer of the house, simplicity in furnishings and food and recreation, and openness to the Church and the poor in the neighborhood of the formation house.

There may be other practices required of those who are in formation but not of the entire community, e.g. restrictions on recreation, a more limited use of social media, and additional prayer activities in the house. These practices too, even if not required by all the fraternity, must be supported by all the brothers as required for the young men.

It is good when possible to have an older brother in the house, one who is retired or semi-retired, who can be a stable and regular presence of prayer and fraternity in the community, who can share his wisdom with the younger members of the community, and who can be a positive witness to aging with grace in the midst of limitations and infirmities.

APPENDIX B: LOAN CONTRACT WITH PROVINCE

To the Capuchin Province of Mid-America:

By this Memorandum of Understanding, I, the undersigned candidate, advise the Capuchin Province of Mid-America that, in order to finance my continuing education, I intend to borrow or may have already borrowed a certain sum of money from a lending institution.

It is my understanding that it is my obligation to repay any debt incurred or to be incurred by me as aforesaid, together with interest due thereon. It is my further understanding, however, that the Capuchin Province of Mid-America will assume the responsibility for any student loan payments, which come due from the date of my commencement of the postulancy on into the future. I, however, will continue to remain responsible for payment of these loans.

I understand also that should I, for any reason, leave the Capuchin Province of Mid-America before the time of my perpetual profession, I agree to reimburse the Capuchin Province of Mid-America for any amounts paid to the lending institution by the said province representing either interest accrued or the principal.

If, however, I should make my perpetual vows with the Capuchin Province of Mid-America, I understand that the Capuchin Province of Mid-America will immediately assume the responsibility for the payment of the entire debt, including all interest and principal.

(Signature of candidate)

(Signature of province)

DATE: _____

Amount of student loans at time of entry to postulancy

\$ _____

APPENDIX C: SPIRITUAL AGREEMENT (CONTRACT) FOR NON-RESIDENT CANDIDATE PROGRAM

Candidate: _____

Address: _____

Phone: _____

On this, the ____ day of _____, 20____, I,

am freely entering this spiritual agreement with the (Vocation Director/Local Contact Friar), with the intention of applying to the Postulancy Program of the Capuchin Province of Mid-America in the near future.

[The terms of this Spiritual Agreement should include those commitments and activities which will foster the candidate's growth toward preparedness for postulancy, e.g. prayer, spiritual reading, study, spiritual direction, sacramental life, apostolic service, sharing the life of the friars, and specific areas of human growth: physical, emotional, social, psychological. Any specific areas of weakness or needed human growth should be addressed in this agreement.]

I agree to these terms of the spiritual contract:

1. _____

2. _____

3. _____

4. _____

5. _____

etc. _____

(Candidate)

(Friar)

[Candidate and Local Friar keep a copy, and
send one to Vocation Office]

APPENDIX D: FORM FOR CANDIDATE SOCIAL MEDIA SURVEY

Name: _____

We would like to know more about your social media presence. Please complete the table below.

NOTE: We will only view what is public, so please **do not include your password for any account.**

Please provide any aliases: _____

Internet Type	Account	Status	Username/Website Address
Facebook	yes/no	public/private	_____
Twitter	yes/no	public/private	_____
Instagram	yes/no	public/private	_____
YouTube	yes/no	public/private	_____
Personal Blog/Website	yes/no	public/private	_____
Other: _____	yes/no	public/private	_____

_____ yes/no public/private _____
_____ yes/no public/private _____

**APPENDIX E: ACADEMIC REQUIREMENTS FOR PRIESTHOOD
 CANDIDATES**

The college and philosophy requirements for our candidates in preparation for priesthood studies follow the norms of the Program of Priestly Formation, 152-157.

1. "Sound philosophical formation requires a biennium of study which is understood in the United States to be at least 30 semester credit hours. The philosophical curriculum must include the study of the history of Philosophy (ancient, medieval, modern, and contemporary), logic, epistemology, metaphysics, philosophy of nature, natural theology, anthropology, and ethics" (186).
2. "A minimum of 12 semester credit hours is required in appropriate courses of undergraduate theology. These courses should study the themes of Catechism of the Catholic Church (doctrine, liturgy and sacraments, morality, prayer) as well as Sacred Scripture" (187).
3. While fulfilling the above requirements, a student may major in the field of his choice for undergraduate degree.
4. For freshman entering the college program, our Province requires 12 hours in Spanish for the sake of ministry to the Hispanic people in our Province.

APPENDIX F: CHECKLIST FOR POSTULANCY APPLICATION

CHECKLIST OF REQUIRED DOCUMENTS:

- A letter to the Vocation Director stating your intentions to apply to the Postulancy Program.
- A letter of Recommendation from your local contact friar with a brief summary of your interaction with the friars in your area (if applicable).
- The Spiritual Agreement. (Mail one copy to Vocation Director, give one to local Contact Friar, keep one for yourself.)
- The Formal Application. (Form provided.)
- A Behavioral Assessment interview report.
- The Document Release Authorization. (Form provided.)
- Baptism and Confirmation Certificates. (Copy.)
- Parents' Marriage Certificate. (Copy.)
- A Brief Autobiography. (Form provided.)
- Transcripts of grades for all colleges/universities attended.
- Letters of Recommendation from non-relatives (teacher, employer, etc.). (Form provided.)
- Letter of Recommendation from a family member (Form provided).
- Letter of Recommendation from Pastor (Form provided.)
- Personal Health History. (Form provided, fill out pages 1 and 2, take to physician.)
- Medical Exam Report. (Form provided, see pages 3 and 4.) Physician does exam, including serology by lab, with drug screen and test for AIDS. Physician sends report to applicant, who forwards report to Vocation Director with application file. A positive HIV test makes one ineligible for Postulancy.)
- Psychological Exam Report, Includes Sexual History Interview. (Done by a licensed clinical therapist with report, released to Admission Board and Postulancy Formation team. Province pays for exam.)
- Criminal Background Check. (Release form provided.)
- Written report of review of candidate's social media content.

APPENDIX F-1: PROCEDURES FOR POSTULANCY ADMISSIONS BOARD

A. PRIOR TO THE MEETING

1. The Provincial Council appoints the Board. Necessary changes can be made by the Provincial Minister. The Vocation Director and the Provincial Minister are non-voting members of the Board.
2. The Provincial Director of Initial Formation convenes the meeting. In January he schedules the meeting for a date and time for two meetings, one in mid-April and one in mid-May, to be agreed upon by the Board.
3. The Vocation Director prepares the files for the applicants and distributes them to Board members at least one week in advance of the meeting.

B. THE MEETING

1. The Provincial Director of Initial Formation opens and chairs the meeting.
2. The Vocation Directors present the candidates, making a positive case for signs of a Capuchin vocation, and comment on whatever aspect of the application file they desire.
3. The PDIF (chair) allows for a free and full discussion of each candidate by all the members, and then calls for a consultative voice vote to be given to the Minister Provincial.
4. The Minister Provincial may announce his decision on the applications at the meeting, or afterwards.

C. AFTER THE MEETING

1. The Vocation Directors inform the applicants of the decision of the Provincial Minister.

2. The Minister Provincial sends an official letter of acceptance and welcome to those accepted.
3. The Vocation Director passes on to the Provincial Minister the appropriate documents for the provincial (permanent) file on each new postulant.
4. The Postulant Director begins a passing formation file on the new postulants, and at the proper time sends them information on the upcoming postulancy year.

APPENDIX G: DOCUMENT OF ENTRANCE INTO POSTULANCY

I, _____, knowingly and freely express my desire to enter the postulancy of the Capuchin Province of Mid-America. With this written statement of my intention, I want to be accepted as a postulant in order to prepare myself for entrance into the novitiate. I willingly submit to the requirements of the Postulant Program. With this written expression of my intention, I promise to accept the judgment of those in authority who will make the decision regarding my suitability for religious life.

(Candidate)

I, _____, in the name of the Capuchin Province of Mid-America, do receive you, _____, as a postulant. I promise on the part of the Capuchin Province of Mid-America to see that you receive the proper formation and training that is required for entrance into the novitiate.

(Minister Provincial)

(Date)

(Seal)

**APPENDIX H: RELEASE FORM FOR USE OF PSYCHOLOGICAL
TEST RESULTS**

**CAPUCHIN VOCATION OFFICE
PROVINCE OF MID-AMERICA**

**STATEMENT OF AUTHORIZATION
FOR REVIEW AND USE OF PERSONAL
DATA AND PSYCHOLOGICAL EXAM RESULTS**

I hereby authorize each Admissions Committee Member, duly appointed, to review my complete Application File, including all personal data contained therein, as well as all psychological evaluation materials that have been collected pertaining to me and my suitability for Capuchin religious life.

I furthermore authorize the Director of the Postulant Program and subsequent formation directors to retain my psychological evaluation materials, for use in my psychological growth and development, until I profess perpetual vows. [Upon my perpetual profession, or upon my leaving the community, these psychological evaluation materials will be destroyed because their usefulness and purpose has passed.]

(Candidate)

(Date)

APPENDIX I: POSTULANCY FINANCIAL AGREEMENT

THIS AGREEMENT made and entered into on this ____ day of 20____, by and between _____
(hereinafter sometimes referred to as "Postulant"), and THE CAPUCHIN PROVINCE OF MID-AMERICA, INC. (hereinafter sometimes referred to as the Province.

WITNESSETH:

WHEREAS, Postulant desires to participate in the Postulancy Program of the Province in accordance with the terms and conditions herein set forth; and

WHEREAS, the Province desires to allow Postulant to participate in its Postulancy Program upon terms and conditions herein set forth; and

WHEREAS, the following covenants, agreements, and representations set forth in writing all of the agreements and understandings of the Postulant and the Province regarding their financial obligations during such time as Postulant is a participant in the Postulancy Program of the Province.

NOW, THEREFORE, in consideration of the premises, the covenants and agreements hereinafter set forth, and other good and valuable consideration, it is hereby covenanted and agreed as follows:

1. Postulant desires to enter the Order of Friars Minor, Capuchin Province of Mid-America, and hereby affirms and represents that all of the Postulant's financial obligations and indebtedness (including, but not limited to, legal, medical, dental, personal and other expenses) owed or incurred by the Postulant, with the exception of educational student loans, have either been paid in full or will be paid in full from Postulant's savings and other assets which Postulant represents as being sufficient to cover such debts, obligations and expenses. Postulant and the Province acknowledge and agree that neither the Province nor any agent or representative of the province in any manner assumes the responsibility for the payment of such debts, financial obligations, and expenses.

2. It is further agreed by the parties that upon entrance into the Postulancy Program, the Province shall, at the Province's expense, provide to the Postulant the Postulant's living accommodations, meals, and other ordinary living expenses. It is agreed by the parties that such accommodations and meals shall be of such character and quality as is determined solely in the discretion of the Province. "Ordinary living expenses" as used in this Agreement shall mean and include those day-to-day expenses customarily incurred by other Postulants

participating in the Postulancy Program. The Province further agrees to pay the premiums associated with providing the Postulant medical insurance having such coverage and issued by such insurer as the Province deems appropriate in its sole discretion. The above-described agreement of the Province to provide accommodations and meals and pay ordinary living expenses as well as to pay the premiums associated with the medical insurance shall cease upon the termination of Postulant's participation in the Postulancy Program.

3. The Province agrees that, upon Postulant's commencement of participation in the Postulancy Program, the Province shall commence payment of the minimum principal payment acceptable to the lender of government-guaranteed educational loans for which Postulant is indebted. Such obligation to remit payment of said educational loans shall not commence until the Province and the Postulant have entered into a certain written agreement concerning the payment of such educational loans which shall require, among other things, for the Postulant to reimburse the Province any sum of money paid by the Province to the lender under such guaranteed educational loans in the event that the Postulant voluntarily or involuntarily leaves the Province and ceases to be a member therein.

4. Postulant recognizes, acknowledges and agrees that all debts, obligations, and expenses, not herein agreed to be paid by the Province during the Postulant's participation in the Postulancy Program, shall be the sole obligation and responsibility of the Postulant and that the Province shall have no liability, obligation, or responsibility to pay such debts, expenses, or obligations.

5. The Postulant covenants and agrees to contribute all wages and earnings received from any apostolic ministry to the community. It is further agreed by the Postulant that gifts received by the Postulant during such period as the Postulant is a participant in the Postulancy Program, which have a value of not more than \$500.00, shall be contributed to the community. Gifts in excess of such amount received by the Postulant during such time as the Postulant is participating in the Postulancy Program, may be given to the local fraternity or placed in the Postulant's savings account. Inheritances received by the Postulant, as well as any income tax refund money from his pre-postulancy employment, shall be retained by the Postulant for placement in Postulant's savings account or another place of safekeeping.

6. Postulant covenants, agrees and represents that all assets and financial resources owned by the Postulant have been placed in the hands of Postulant's administrator during Postulant's formation years. Postulant agrees that in the event that Postulant is accepted and decides to make perpetual profession, Postulant shall make disposition of such assets and financial resources in accordance with the norms and requirements of the Constitutions of the Order of Friars Minor Capuchin.

CAPUCHIN PROVINCE OF MID-AMERICA, INC.

By: _____

Postulant

Witness

**APPENDIX I-1: ACKNOWLEDGEMENT OF RECEIPT FORM
FOR PROVINCE'S SAFE ENVIRONMENT POLICY**

I hereby acknowledge that on _____ I received a copy of the Capuchin Province of Mid-America's "Provincial Policy for Protecting Children, Youth and Vulnerable Adults, effective November 2005, re-written in October 2015, and updated in May 2016. I further declare that I have read the Policy, that I understand its meaning, and that I agree to conduct myself in conformity with the Policy. I understand that this acknowledgement will be kept in the Provincial Office and will be renewed in each triennium. If the document must be amended significantly in the future (as determined by the Provincial Minister and his Council), I understand that I may have to sign a new document.

Print Name

Signature

Date

CAPUCHIN PROVINCE OF MID-AMERICA

3613 Wyandot St.

Denver, CO 80211

APPENDIX J: DOCUMENT OF TEMPORARY PROFESSION

I, _____, did this ____
day of _____, 20____, make
temporary profession for three years, in the Capuchin Province of Mid-
America.

(Signature)

(Date)

I, _____, Provincial
Minister of the Capuchin Province of Mid-America, did this ____ day of
_____, 20 ____, receive the temporary vows of
_____ for ____ years, at
_____.

(Provincial Minister)

(Witness)

(Witness)

(Date)

APPENDIX K: FREEDOM TO PROFESS

I, Brother _____, Capuchin novice, intend, declare, and testify through this oath before God and the under-signed witnesses that I, having completed my novitiate year on _____, 20 ____, will take simple vows on _____, 20 _____. I therefore intend, declare, and testify that I take them freely, willingly, and with a firm intention before God and all people to oblige myself in the Capuchin Order to the vows of obedience, poverty, and chastity. In addition, I firmly resolve to lead a perfect common life in this Order. I also declare and testify that I was not compelled nor persuaded to take these vows through force, fear, or threat of any kind by my parents, or by any person related by blood, or by any other person. Moreover, I declare that I do not have any impediment contrary to Canon Law or the Rule. I have no contagious or incurable sickness, nor any other thing, which would hinder the validity of my profession in any way. I make this profession freely and willingly, without deceit, fraud, or mental reservation. I declare my intention of continuing my religious formation and studies under the direction of my Capuchin superiors. So help me God and these Holy Gospels on which I place my hand. In testimony of this, I have with my own hand subscribed my name in the Friary of _____ of the Capuchin Order at _____.

Novice

Date

WITNESSES:

(This oath is written out by hand and made on the day of profession or within a short time before.)

APPENDIX L: TRUST AGREEMENT

TRUST AGREEMENT, made this ____ day of _____,
20____, by and between _____
(hereinafter sometimes referred to as "Trustee").

WITNESSETH:

WHEREAS, the Grantor is desirous of making temporary profession in the Capuchin Order, in the Province of Mid-America; and

WHEREAS, Grantor desires to transfer all of his property, whether real or personal, including the right to use said property and the usufruct (gains and profits) from said property during the period of Grantor's profession, to the Trustee pursuant to the terms and conditions of this Trust Agreement; and

WHEREAS, Trustee desires and agrees to act as Trustee under the terms and provisions of the Trust Agreement.

NOW, THEREFORE, in consideration of the premises and for the purposes of declaring the terms and conditions upon which the Trustee is to receive, hold, and dispose of the principal and income of the proceeds of all property which may be subject to this Trust Agreement, it is covenanted and agreed by and between the parties hereto as follows:

THE TRUSTEE SHALL HAVE AND HOLD THE SAME, and any other property which the Trustee may hereafter at any time hold or acquire from the Grantor or otherwise, all of which shall hereinafter collectively be referred to as the "Trust Estate", **IN TRUST**, for the uses and purposes and subject to the terms and conditions hereinafter set forth.

1. **Trust Property.** The Grantor assigns and delivers to the Trustee, in trust, all of Grantor's property, whether real or personal, or owned individually or jointly. The Trustee acknowledges receipt of such property, to be held in trust for the uses and purposes expressed and subject to the conditions of the trust provided. The Grantor reserves the right to add to the corpus of this trust, and any property added shall be held, administered, and distributed as part of the trust.

2. **Dispositive Provisions.** The Trustee shall hold, invest, and reinvest the trust property, and shall apply and distribute the income and principal of the trust property in the following manner:

- a) Unless and until any of the events hereinafter set forth in the remaining subparagraphs to this numbered paragraph 2 shall occur,

the Trustee shall hold, manage, invest, and reinvest the trust property in such manner as to preserve such property or the beneficiaries of this trust as is hereinafter provided.

- b) In the event that Grantor hereinafter departs the religious life in the Capuchin Province of Mid-America, voluntarily or involuntarily, during the period of Grantor's temporary profession in the Capuchin Order, all income and principal in the trust shall be immediately distributed to Grantor.
- c) In the event that Grantor is accepted as a member of the Capuchin Order and is permitted to make solemn profession of perpetual vows, thirty (30) days prior to said perpetual profession, all principal and income of the trust shall be paid over and distributed to the Grantor.
- d) In the event that this trust is not sooner terminated by distribution of all of the principal of the trust property and interest thereon, this trust shall terminate twenty (20) years from the date of this Agreement, or upon the death of the Grantor, whichever shall first occur, and upon such termination, any undistributed principal and income of the trust shall be paid over to the then acting Trustee to be expended in such manner and for such purposes as the Trustee deems appropriate, in the Trustee' sole discretion.

3. Taxes, Loans and Liens. The Trustee shall make timely payment from the interest earned upon principal of the trust property of all taxes, obligations, liens, and encumbrances, which shall attach to the trust property. In the event that the interest earned upon the principal of the trust property is insufficient to satisfy such taxes, obligations, liens, and encumbrances, which shall attach to the trust property, the Trustee shall invade the principal of the trust property as is required to make such payment.

4. Trustee's Powers. In the administration of the trust, the Trustee shall have the following powers, all of which shall be exercised only in a fiduciary capacity, primarily in the interest of the beneficiary.

- a) The Trustee shall have the power to apply for, cause to be assigned to the Trustee, hold, and exercise any incident of ownership in any policy of insurance on the life of any person other than the Grantor, and pay the premiums.
- b) The Trustee shall have the power to lend money or to purchase assets from the estate of the Grantor, and shall not be accountable for any loss resulting from any transaction.

- c) The Trustee is authorized to engage in any business deemed advisable by him in his sole discretion as a general or special partner; to incorporate any business and hold the shares as an investment; and to employ agents to manage and operate any business without liability for the acts of any agent, or any loss, liability or indebtedness of the business, if the management is selected or retained with reasonable care.
- d) The Trustee may invest and reinvest the trust assets and bonds, corporate shares, notes, mortgages, real estate, and improvements, or other property, real or personal, as to him shall appear to be in the best interest of the Trust. The Trustee shall have as wide a latitude in the selection or making of investments or reinvestments of the corpus and income of the trust property, or in borrowing or lending money for the benefit and use of the trust fund, as if he, as an individual, were the absolute owner, irrespective of any statute or rule of law limiting the investment of trust funds.
- e) The Trustee may publicly or privately, and without order of any court, mortgage, create a security interest in, pledge, or sell for its fair market value, any or all of the trust property for periods beginning or ending after the termination of the trust. No purchaser, secured party, or mortgagee shall be obligated to see to the application of any purchase, loan, or mortgage money.
- f) The Trustee shall have the power to make any division or distribution of income or corpus in kind or partly in kind, and partly in money, and to determine the value of any property so divided or distributed.
- g) The Trustee is authorized to cause any securities or other property, real or personal, belonging to the trust to be held or registered in his name, or in the name of his nominee, or in any form, as he deems best, without disclosing the trust relationship.
- h) Each power and right granted to the Trustee may be exercised without any order of any court and without any notice or consent of anyone.

5. Exercise of Powers. The Trustee may freely act under any of the powers of this Agreement given to him in all matters concerning the trust, after forming his judgment based upon all of the circumstances of any particular situation as to the wisest and best course to pursue in the interest of the trust and the beneficiaries, without the necessity of obtaining the consent or permission of any interested person, or the consent or approval of any court, and notwithstanding

that he may also be acting individually, or as a trustee of other trusts, or as an agent of other persons or corporations interested in the same matters, or may be interested in connection with the same matters as a shareholder, director, or otherwise. No person, other than the Trustee, shall have or exercise the power to vote or direct the control of the investment or the trust either by directing the investments or reinvestments or by vetoing proposed investments or reinvestments, or to reacquire or exchange any property of the trust by substituting other property of equivalent value.

6. Trustee Mistakes. The trustee named herein with respect to any trust herein created shall not be liable for any mistakes in judgment in the making or retaining or investments, so long as the same be made or retained in good faith.

7. Successor Trustee. In the event of the death, resignation or incapacity of any trustee, the following persons, in the order named, shall be the successor Trustee:

Every successor Trustee shall have the same duties and powers, as are conferred and assumed by this Agreement, upon the original Trustee hereunder.

8. Bond. No Trustee shall be required to give any bond or other security for the faithful performance of his duties and powers.

9. Situs. This Agreement shall be governed by the laws of the State of _____.

IN WITNESS WHEREOF, the Grantor and Trustee have caused this Agreement to be executed, the day and year first hereinabove written.

GRANTOR

TRUSTEE

STATE OF _____)
) ss:
COUNTY OF _____)

ON THIS _____ day of _____, 20____,
before me, a Notary Public, personally appeared _____,
to me known to be the person described in and who executed the foregoing
Trust Agreement as Grantor, and acknowledged that he executed the same as
his own free act and deed.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed
my official seal in the County and State aforesaid, on the day and year last
above written.

Notary Public

My Appointment Expires:

(Notary Seal)

STATE OF _____)
) ss:
COUNTY OF _____)

ON THIS _____ day of _____, 20____, before
me, a Notary Public, personally appeared _____,
to me known to be the person described in and who executed the foregoing
Trust Agreement as Grantor, and acknowledged that he executed the same as
his own free act and deed.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal
in the County and State aforesaid, on the day and year last above written.

Notary Public

My Appointment Expires:

(Notary Seal)

SCHEDULE OF PROPERTY

The following described property is made subject to the terms and provisions of the foregoing Trust Agreement:

APPENDIX M: GENERAL DURABLE POWER OF ATTORNEY

STATE OF _____)
) ss:
COUNTY OF _____)

I, _____
also known as _____
presently of _____
hereby appoint my Local Minister of the Capuchin Province of Mid-America as
such exists at the time this Durable Power of Attorney shall be effective, which
said Local Minister shall be designated in the directory of the Capuchin Province
of Mid-America, Inc., as my attorney-in-fact.

EFFECTIVE DATE OF DURABLE POWER OF ATTORNEY. This durable
power of attorney shall become effective upon my disability or incapacity and
shall thereafter not be affected by such disability or incapacity. The effective
date shall be determined by the Minister Provincial (or his successor) of the Mid-
America Province in a writing attached to this durable power and his decision
shall not be questioned by any third party. Further, this durable power of
attorney is intended to be effective in and conform to the laws of my state of
residence indicated above.

CAPUCHIN LIFE. It is my firm conviction that my life as a Capuchin
friar has meaning and value in any circumstance that occurs once this durable
power of attorney is declared effective. My decision to join the Capuchin Order
was a free choice and is one that has been constantly reaffirmed over the years
by my free choice to live the Capuchin life. I do not wish any third party to look
to anyone else for decisions regarding me except to my attorney-in-fact.

I especially expect health care providers to act on my behalf as directed
by my attorney-in-fact and not look to my family for decisions about my care.
Also, I expect my family to honor my wishes and not interfere in decisions about
my life or care. This desire in no way manifests a lack of love of my family, but
it does recognize that I am a Capuchin friar and the proper ones to decide about
my care are the Capuchin friars through my attorney-in-fact. My attorney-in-
fact, however, may consult with my family regarding my affairs or health care
and I encourage such consultation. If against my wishes, this power of attorney,
or decisions made because of it, is referred to a court of law, I expect the usual
presumptions found in law to look to family especially for health care decision to
be put aside. I made a free choice in life to be a Capuchin friar and to execute

this durable power of attorney; I expect those choices to be honored and the decisions made by my attorney-in-fact to be upheld.

1. **Personal and Medical Care.** My attorney-in-fact is to make each and every judgment necessary for the proper and adequate care and custody of me to hire, employ, pay for and discharge such domestic help, nursing services, and practical and/or registered nurses as my attorney-in-fact may determine to be in the best interests of my health, and the power to give an informed consent or any informed refusal on my behalf with respect to my physical or mental health care and comfort, including specifically by way of illustration only and not by way of limitation:

- a) Any medical care, diagnosis, surgical procedure, therapeutic procedure and/or other treatment of any type or nature;
- b) Any physical rehabilitation program;
- c) Any dental procedure;
- d) Any psychiatric or psychological care or treatment;
- e) The admission to any hospital, medical center, nursing home, or mental institution;
- f) The use of any drugs, medication, therapeutic devices, or other medicines or items related to my health;
- g) The execution of waivers, medical authorizations, and such other approval as may be required to permit or authorize care which I may need;
- h) The waiver of any doctor-patient privilege; and the power in general to take and authorize all acts with respect to my health and well-being, and to expend all amounts in connection therewith to the same extent as I could if mentally competent to do so. The prices, costs, expenses, and compensation incurred in furtherance of the foregoing are all to be within the sole and absolute discretion of my attorney-in-fact;
- i) The access to any and all medical information from past or present.

2. **Terminate Life Support Systems.** I wish to live as long as possible, but I do not wish to receive futile medical treatment, which I define as treatment that will provide no benefit to me and will only prolong my inevitable death or irreversible coma. In these circumstances, therefore, my attorney-in-fact is to

request that aggressive medical therapy not be instituted or, if instituted, be discontinued, including (but not limited to) cardiopulmonary resuscitation, the implantation of a cardiac pacemaker, renal dialysis, the use of respirators or ventilators, blood transfusions, nasogastric tube use, endotracheal tube use, antibiotics, and organ transplants. My attorney-in-fact should try to discuss the specifics of any such decision with me if I am able to communicate with him in any manner, even by blinking my eyes. If I am unconscious, comatose, senile, or otherwise unreachable by such communication, my attorney-in-fact should make the decision guided primarily by any preferences, which I may have previously expressed, and secondarily by the information given by the physicians treating me as to my medical diagnosis and prognosis. My attorney-in-fact may specifically request and concur with the writing of a "no-code" (DO NOT RESUSCITATE) order by the attending or treating physician.

CERTIFICATION FOR ARTICLES 1 AND 2

I CERTIFY THAT I HAVE READ ARTICLES 1 AND 2 AUTHORIZING MY ATTORNEYS-IN-FACT TO REFUSE MEDICAL TREATMENT FOR ME UNDER THE CIRCUMSTANCES SPECIFIED IN THESE ARTICLES, THAT I UNDERSTAND SUCH PROVISIONS, AND THAT SUCH PROVISIONS STATE MY WISHES AND DESIRES UNDER THE CIRCUMSTANCES DESCRIBED.

Signature

WITNESSES: _____

3. **Provide Me Relief from Pain.** My attorney-in-fact is to consent to and arrange for the administration of pain-relieving drugs of any type, or other surgical or medical procedures calculated to relieve my pain, even though their use may lead to permanent physical damage, addiction or even hasten the moment of (but not intentionally cause) my death.

4. **Protect My Right of Privacy.** My attorney-in-fact is to exercise my right of privacy to make decisions regarding my medical treatment and my right to be left alone even though the exercise of my right might hasten death or even

be against conventional medical advice. He may take appropriate legal action, if necessary in his judgment, to enforce my right in this regard.

5. **Funeral Arrangements.** My attorney-in-fact shall make any arrangements for my funeral and burial.

6. **Power to Nominate Conservator or Guardian.** If required by law or by a court order, my attorney-in-fact should nominate and/or petition for the appointment of a guardian, conservator or serve in any fiduciary office representing me or any interest or mine. Also, I waive any bond requirement such office may require.

7. **Third Party Reliance.** For the purposes of inducing any physician, hospital, bank, broker, custodian, insurer, lender, transfer agent, taxing authority, governmental agency, or other party to act in accordance with the power granted in this document, I hereby represent, warrant, and agree that:

a. If this document is revoked or amended for any reason, I, my estate, my heirs, successors, and assigns will hold such party or parties harmless from any loss suffered, or liability incurred, by such party or parties in acting in accordance with this document prior to that party's receipt of written notice of any such termination or amendment.

b. The powers conferred on my attorney-in-fact by this document may be exercised by him alone and a signature or act under the authority granted in this document may be accepted by third parties as fully authorized by me and with the same force and effect as if I were personally present, competent, and acting on my own behalf.

c. No person who acts in reliance upon any representation made as to the scope of authority granted under this document shall incur any liability to me, my estate, my heirs, successors, or assigns for permitting the exercise of any such power, nor shall any person who deals with my attorney-in-fact be responsible to determine or insure the proper applications of funds or property.

d. All third parties from whom my attorney-in-fact may request information regarding my health or personal affairs are hereby authorized and directed to provide such information to them without limitation and are released from any legal liability whatsoever to me, my estate, my heirs, successors, or assigns for complying with their requests. With specific reference to medical information, including information about my mental condition, I hereby authorize in advance all physicians and psychiatrists who have treated me and all other providers of health care, including hospitals, to release to my agent(s) all information and photo-copies of any records which my agent(s) may request.

8. **Photographic Copies.** Photographic or other facsimile reproductions of this executed power may be made and delivered by my attorney-in-fact and may be relied upon by any person to the same extent as though the copy were an original. Anyone who acts in reliance upon any representation or certificate of my attorney-in-fact or upon reproduction of this power shall not be liable for permitting my attorney-in-fact to perform any act pursuant to this power.

I have signed and delivered this General Durable Power of Attorney this ____ day of _____, 20 ____.

WITNESSES:

STATE OF _____)

)ss:

COUNTY OF _____)

On this ____ day of _____, 20 ____, personally appeared _____, before me, a Notary Public, who executed the above General Durable Power of Attorney, in two places and acknowledged the same to be his free act and deed.

Subscribed and sworn to before me, this ____ day of _____, 20 ____.

Notary Public

My Commission Expires:

**APPENDIX N: REMOVAL AND DESTRUCTION OF PSYCHOLOGICAL
TEST REPORT**

Name of brother _____

File removed:

_____ Psychological evaluation

_____ Other(specify) _____

Original date of document _____

Original reason for document:

_____ Admission and formation purposes

_____ Other(specify) _____

Reason for removal:

_____ Brother made final profession, therefore there is no reason
for having document on file because its original purpose is fulfilled.

_____ The man left our community; therefore, there is no reason for
having document on file because its original purpose is fulfilled.

Date of removal _____

_____ Nothing in the document concerning the above-named person indicated
that he had an untreated alcohol or substance abuse problem at the time
the report was generated. Nothing in this report provided any sign of

misconduct in relationship with members of his own sex or the opposite sex, nor with minor children and adolescents.

Formation Director

Date

APPENDIX O: CATHOLIC DECLARATION OF LIFE AND DEATH

I believe that each individual person is created by God our Father in love and that God retains a loving relationship to each person throughout human life and eternity.

I believe that Jesus Christ lived, suffered, and died for me and that his suffering, death, and resurrection prefigure and make possible the death-resurrection process which I now anticipate.

I believe that each person's worth and dignity derives from the relationship of love in Christ that God has for each individual person and not from one's usefulness or effectiveness in society.

I believe that God our Father has entrusted to me a shared dominion with Him over my earthly existence so that I am bound to use ordinary means to preserve my life but I am free to refuse extraordinary means to prolong my life.

I believe that through death life is not taken away but merely changed, and though I may experience fear, suffering, and sorrow, by the grace of the Holy Spirit, I hope to accept death as a free human act which enable me to surrender this life and to be united with God for eternity.

DECLARATION

This Catholic declaration of Life and Death, made while I am of sound mind, is provided as a means of indicating my desires and directions regarding treatment or care for me in the event I become irreversibly and terminally ill.

I therefore admonish and direct my provincial, guardian, and vicar that, because of my Catholic belief in the dignity of the human person and my eternal destiny in God, if I become irreversibly, incurably, and terminally ill, I be fully informed of the facts so that I can prepare myself spiritually to die.

I have the right to make my own decisions concerning treatment that might inordinately prolong the dying process beyond the limits dictated by reason and good judgment. If I should have an incurable injury, disease or illness, certified to be a terminal condition by two physicians who have examined me, one of whom shall be my attending physician, and the physicians have determined that my death will occur whether or not life sustaining procedures are utilized and where that application of life sustaining procedures would serve only to artificially prolong the dying process; and if I am unable to make my own decisions, and have no reasonable expectation of recovery, then I request and direct that no ethically extraordinary means be used to prolong my life, but that my pain be alleviated. (The term "ethically extraordinary means" signifies treatment that does not offer a reasonable hope of benefit to me and that

cannot be accomplished without excessive expense, pain, or other grave burden.) No means should be used with the intention of shortening my life.

Nothing in this Declaration shall relieve my physicians and/or health-care providers of their obligations to provide me with nutrition and hydration and to provide other measures, which alleviate pain.

I request that my family, the Catholic community, and all my friends join me in prayer and sacrifices as I prepare for death. I further request that, after my death, others continue to pray for me that, with God's grace, I will enjoy eternal life.

Signed this _____ day of _____,
20_____

Signature: _____

County and State of Residence: _____

The declarant has been personally known to me and I believe him or her to be of sound mind, I did not sign the declarant's signature above for or at the direction of the declarant. I am not related to the declarant by blood or marriage, entitled to any portion of the estate of the declarant according to the laws of intestate succession or under any will of declarant or codicil thereto, or directly financially responsible for declarant's medical care.

(Signatures of Witnesses)

(Addresses of Witnesses)

Copies to: Provincial Office, Physician, Guardian

**APPENDIX P: WORK AND MINISTRY TRAINING DISCERNMENT
PROCESS**

The purpose for this process of entering into discernment for work and ministry formation in the Capuchin Province of Mid-America is threefold.

1. It helps a brother in temporary vows discern what form and focus his work or ministry formation will take, including the question of whether he is called to study for ordained ministry or lay work and service in the Order and Church.
2. It places the context of work and ministry within the Capuchin community, so that the brother develops his talents in response to and dialogue with his brothers and superiors. All work and ministry therefore is seen as an apostolate of the whole province, and the priesthood is understood in some sense as a "call" from the Capuchin and Provincial community, as well as a call from the larger ecclesial community.
3. It provides data to the Post-Novitiate Director and Provincial Minister in their decisions about appropriate courses of study and training programs, both for the ordained ministry and for other works and ministries in the Order and Church.

This process assumes that the brother in temporary vows has already demonstrated a firm and consistent desire, and the necessary skills, to live the Capuchin life; and that he will continue to take responsibility for his own ongoing formation, with community support, during his formation for work and ministry. He is therefore ready to decide how to express his Capuchin life of service and is prepared to take responsibility for his decisions about work and ministry formation.

Process

- A. The Post-Novitiate director visits with the novice, after his acceptance for profession, to ascertain his initial discernment about work and ministry formation and to prepare for any work and ministry formation that may begin in the fall semester.
- B. Immediately after his temporary profession, the brother and his Post-Novitiate Director begin a process of reflection to discern his call to work and ministry as a Capuchin, or to deepen a discernment he has already made. To aid in his discernment the brother should read the *Capuchin Constitutions* chapters V and IX, CPO VIII's "The Grace of Working," and *Pastores Dabitur Vobis*.
- C. The brother writes a reflection paper that includes a description of his goals, his conscious motivation, and the past experiences that led him to this step of discernment.

If the brother believes he is called to the work and service of a lay brother, the paper should include:

1. His particular interests and desires for work and service as a lay brother, and his work and apostolic experiences that have awakened and support those desires. What was joyful and fulfilling in those experiences?
2. What lay brothers have inspired him in his Capuchin formation thus far, and what particular is appealing about them. How does he see himself suited to the life and spirituality of a lay brother?
3. A reflection of how he foresees himself relating to the larger fraternity (who would be mostly priest brothers), and how he might enrich that fraternity. What are some of the difficulties and tension he might encounter?
4. A listing of the kinds of work and skills he would like to learn, and be willing to learn, to serve the needs of the Province and Church. (NOTE: an aptitude test might be a necessary part of this process.)

If the brother wishes to study for the priesthood, the paper should include:

1. A description of his earliest and first impressions of the priesthood (What was it like? Who influenced him? Were there any changes in his original inspiration? What people/ministries have influenced him?);
2. A description of what kind of Capuchin priest he would see himself becoming (What would he do? How would he relate to others? How would his being a Capuchin affect his way of being a priest?);
3. A description of what consequences he foresees becoming a priest would have on his fraternal relationships.

D. The Post-Novitiate Director, in consultation with the brother in temporary vows, will consult others who know the brother concerning his involvement in work and ministry, his academic ability, and his suitability for various kinds of work and ministry.

E. The brother in temporary vows, the Provincial Minister, and the Post-Novitiate Director meet together to discuss the above material. The Provincial Minister then makes the decision about beginning or continuing his formation for work and ministry.

Some reflection questions for lay brotherhood candidates

1. Does he have a positive sense of the Capuchin Gospel brotherhood as a witness and mission in the Church and world?

2. Does he have a positive and joyful sense of his own dignity and his equality with all the brothers in the Capuchin life?
3. Does he understand work as holy activity to glorify God, a share in the ongoing care of creation, a way to build up the kingdom of God on earth?
4. Does he see his work and service as a source of financial support, active charity and solidarity with the poor in his Capuchin life?
5. Is he able to work collaboratively in fraternal service and the various works and services of the fraternity, fulfilling his role and supporting the roles of others?
6. Is he realistic about his capacity to do academic studies? Technical training? Is he willing to study and prepare for work and ministry to the fullness of his ability?
7. Is the candidate aware of both his strengths and weaknesses in the areas of work and apostolic service? Can he recognize his abilities and limitations in the area of public ministry in the Church?
8. Is he capable of collaborative service with men and women, professional and clerical workers, in his expressed interests in public apostolic works (e.g. parishes, schools, social services, etc.)?
9. Is he committed to ongoing formation in his areas of work in the Order and Church?

Some reflection questions for priesthood candidates

1. Is the candidate accepting of a Vatican II theology of priesthood?
2. Does he have a sense of the complexity and pluralism in the Church's theology, spirituality and life, and is he willing to work within such a church?
3. Is he able to accept his special role in the Church, recognizing that his priesthood differs from the lay priesthood essentially, and not only in degree?
4. Does he have an appreciation for the role of laymen and women, and does he understand properly the role and relationship of the cleric to laity?
5. Is he able to work collectively and collaboratively with others (bishops, other priests, laymen and women, religious men and women)?

1.Immersion Course. A high priority is given to Spanish studies during the summer since our present course of studies does not generally allow us to add this type of training during the ordinary academic year.

2.Clinical Pastoral Education. This applies to all brothers in initial formation. An approved CPE institution would optimally be located near a Capuchin friary.

3.At least one summer of work or ministry experience in one of our Capuchin ministries or apostolates. (NOTE: this requirement can also be fulfilled by a significant weekly ministry in a Capuchin ministry or apostolate during a semester.)

D. Other Options Beyond Required Programs

1.Franciscan Studies at St. Bonaventure University. It would be expected that a brother take a full summer course load (i.e. 6 credits).

2.Studies in one's area of concentration or to fulfill his degree or program requirements. Again, the brother is expected to take a full summer course load.

3.A brother in formation may propose a program of his own choosing provided that it is serious career formation and is supervised. This especially applies to one preparing for a specialized ministry or apostolic work.

After consultation, and after discussion with the formation council, the Post-Novitiate Formation Director will present requests to the Provincial Minister.

APPENDIX R: POST-NOVITIATE CONTRACT FOR THOSE LIVING OUTSIDE OF A FORMATION HOUSE OF THE PROVINCE

Brother's Name: _____

Address of Residency: _____

PROGRAM/STUDIES/WORK/MINISTRY

Title of Program: _____

Description of Program: _____

Address of Program: _____

Length of Program: _____

Ministry Supervisor: _____

FORMATION GOALS (human, spiritual, intellectual, pastoral, Franciscan)

Goal 1: _____
Means _____
Means _____

Means _____

Goal 2: _____
Means _____

Means _____

Means _____

Goal 3: _____
Means _____

Means _____

Means _____

Goal 4: _____
Means _____

Means _____

Means _____

Goal 5: _____
Means _____

Means _____

Means _____

Formation Director _____

Signed: _____
(brother) (date)

(post-novitiate director) (date)

(local director) (date)

APPENDIX S: LAST WILL & TESTAMENT*

IN THE NAME OF GOD, AMEN.

I, _____
otherwise known as _____
being of legal age, of sound mind and memory, do hereby make, publish, and
declare this to be my last will and testament.

FIRST: I give, devise, and bequeath to

_____ all property, real, personal, and mixed, which I now possess or which I may
hereafter acquire.

SECOND: I hereby nominate and appoint

as executor of this will, without bond or inventory.

IN WITNESS WHEREOF, I have hereunto set my hand this ____ day of _____, 20____.

(Signature)

Signed, published, and declared by the above-named _____, otherwise known as _____ as his last will and testament, in the presence of us, who, in his presence and at his request, and in the presence of each other, have hereunto subscribed our names as witnesses the day and year last above written.

WITNESS

WITNESS

*To be made any time within sixty (60) days previous to perpetual profession.

APPENDIX T: DOCUMENT OF PERPETUAL PROFESSION

I, Brother _____, Capuchin friar, intend, declare and testify through this oath before God and the undersigned witnesses, that I will take perpetual vows on _____, 20____. I, therefore, intend, declare and testify that I take them freely, willingly, and with a firm intention before God and man to oblige myself in the Capuchin Order to the vows of obedience, poverty, and chastity. In addition, I firmly resolve to lead a perfect common life in this Order. I also declare and testify that I was not compelled nor persuaded to take these vows through force, fear or threat of any kind by my parents, or any person related by blood, or any other person. Moreover, I declare that I do not have any impediment contrary to Canon Law or the Rule. I have no contagious or incurable sickness, nor any other thing, which would hinder the validity of my profession in any way. I make this profession freely and willingly, without deceit, fraud, or mental reservation. I declare my intention of continuing my religious formation and studies under the direction of my Capuchin superiors. So help me God and these Holy Gospels on which I

place my hand. In testimony of this, I have with my own hand subscribed my name.

(Brother)

(Witness)

(Witness)

APPENDIX U: CHECKLIST FOR THEOLOGICAL STUDIES FOR THE CAPUCHIN PROVINCE OF MID-AMERICA

The course and requirements for our candidates for priesthood follow the norms of the Program of Priestly Formation, 197-230.

1. The core should include fundamental theology, the basis of rational procedure of all theology and, thus the introduction to the study of theology.
2. In scripture, the core should include the study of the Pentateuch, the historical, prophetic and wisdom (especially the Psalms) books of the Old Testament, the Synoptic Gospels and Acts, Pauline and Johannine literature, and the Catholic Epistles.
3. In dogmatic theology, the core must include the theology of God, One and Three, Christology, Creation, The Fall and the nature of sin redemption, grace, and human person, ecclesiology, sacraments, eschatology, Mariology and missiology.
4. In moral theology, the core must include fundamental moral theology, medical-moral ethics, sexual morality, and social ethics.
5. In historical studies, the core should include courses on the history of the Church universal and the Catholic Church in the United States.
6. In canon law, the core should include a general introduction to canon law and the canon law of individual sacraments.
7. Studies in spirituality and spiritual direction are to be included.
8. In liturgy, the core should include studies in the theological, historical, spiritual, pastoral and juridical aspects of liturgy.
9. Homiletics should occupy a prominent place in the core curriculum and be integrated into the entire course of studies.
10. The core should include an introductory course in ecumenism.
11. Studies in pastoral theology are required and should include treatment of the principles and criteria for pastoral action and provide theological reflection where seminarians are involved in supervised ministry.
12. The Province requires at least two semesters of Spanish study before ordination, for those brothers who are not bi-lingual, and a summer Spanish immersion experience.

APPENDIX V: PROCESS, REQUIREMENTS AND CELEBRATIONS FOR MINISTRIES OF ACOLYTE AND LECTOR

After perpetual vows, candidates for the Ministries of Acolyte and Lector follow this procedure in requesting, preparing for and celebrating the Ministries.

I. Requirements for Ministries.

- A) The candidate must be in perpetual vows.
- B) The candidate makes known to the Post-Novitiate Director his desire for Ministries. The candidate and Post-Novitiate Director prepare the documents, evaluations and recommendations required for the scrutiny by the Commission on Orders and Ministries.

Checklist for application for the Ministries of Lector and Acolyte:

____A written request of the candidate with which he asks to be admitted to the rite. This request is composed by the candidate personally and written out in his own hand (cf. can. 1034 § 1).

____A personal report of the Post-Novitiate Director. The report must be detailed, making use of the general lines of the model found in the below Appendix X: Guidelines for Reports for Promotion to Orders and Ministries (cf. can. 1051, 1°).

____A collegial consultation of the priests entrusted with the formation in the house of formation.

____A consultation of the priest in charge of the place or the ministry where the candidate assists in pastoral work.

____Other information that the director of the house of formation considers necessary to gather.

a) Ministry Evaluations____

b) Personal Testimonies____

____The opinion of the candidate's class companions, given in a secret and personal form, in which positive or negative opinions and reasons are expressed concerning the suitability of the candidate.

a) Diocesan peers____

b) Capuchin peers____

- c) The *modus operandi* of the Commission for Orders and Ministries is as follows:
 - a. The Commission establishes its own method for the study of the records of the candidate.
 - b. The collegial session is presided over by the Provincial Minister or by his delegate.

- c. The sessions of the Commission are conducted with freedom so that each member is able to express his own opinion in accordance with his conscience.
 - d. The meetings of the Commission are held in closed session.
 - e. The discussion of the information concerning each candidate must end with a vote that can be secret if any of the members requests. The Commission gives a recommendation to the Provincial Minister on whether or not to accept the candidate's request for Ministries.
 - f. The opinion of the Commission is not binding upon the Provincial Minister, however it is an act having great moral value, and should not be set aside except for grave reasons (cf. can. 127:2).
 - g. The affirmative or negative recommendation of the Commission must be registered in the personal file of the candidate, with an explicit indication of the result of the vote.
 - h. It is the place of the Provincial Minister or his delegate to inform the candidate of the decision taken.
 - i. A positive decision of the Bishop or Superior must be expressed in the form of a Decree of Admission (cf. can. 1034:1) issued at least one month before the date of Ministries.
- D) The candidate may be asked to indicate his readiness for the ministry by a practical exam; specifically, by preparing a prayer service or general intercessions for the ministry of lector, and by demonstrating that he can conduct a communion service for the ministry of acolyte.
- E) The Provincial Minister receives the report of the Commission for Orders and Ministries and the recommendation of the Post-Novitiate Director, and makes his decision on the candidate's request.

II. Celebration of Ministries of Acolyte and Lector

- A) The celebration should be low key.
- B) The ceremony may take place at a provincial assembly, provincial chapter, in the local fraternity, or at the place where the candidate lives and will exercise his ministries.
- C) Each Ministry should be celebrated separately for the individual. The Program of Priestly Formation asks for an interval of six months (283).
- D) The Ministries should be celebrated sufficiently in advance of ordination to the diaconate to allow for the exercise of each ministry.
- E) Documents of the institution of Ministries are placed in the brother's provincial file.

APPENDIX W: PROCESS OF ADMISSION TO DIACONATE

Candidates for the Order of the Diaconate assume the personal responsibility of requesting, fulfilling the requirements for, and helping to plan the celebration of diaconate. This is done in dialogue with the Post-Novitiate Director and the Provincial Minister.

Candidates must have already celebrated the ministries of Lector and Acolyte. When the Brother is ready to request Holy Orders, the following process is followed:

- A) Having finished the requirements for the diaconate in his institution's theological and ministerial training program, and in fulfillment of the requirements set by the United States Bishops (Appendix U), the brother makes known his request for diaconate to the Post-Novitiate Director and writes a letter to the Provincial Minister requesting diaconate.
- B) The Post-Novitiate Director presents to the Province's Commission for Orders and Ministries the pertinent documents, evaluations, and recommendations. (See *modus operandi* for the Commission in the above Appendix V: Process, Requirements and Celebrations for Ministries.)

Checklist for application to the Diaconate:

- a. ___ A written request of the candidate with which he asks to be admitted to the rite. This request must be composed by the candidate personally and written out in his own hand (cf. can. 1034:1).
- b. ___ An academic report from school or seminary attended.
- c. ___ The results of his priesthood examination or other proof of academic and ministerial readiness required by the theology school.
- d. ___ A personal report of the Post-Novitiate Director. The report must be detailed, making use of the general lines of the questions in Appendix X below (cf. can. 1051:1).
- e. ___ A collegial consultation of the priests entrusted with the formation in the house of formation.
- f. ___ Evaluations and recommendations from the fraternities in which the brother has lived during his theological and ministerial training.
- g. ___ A consultation of pastor or ministry supervisor(s) of the institution where the candidate assists in the pastoral work.
- h. ___ Other information or testimonies that the director of the house of formation considers necessary to gather.
- i. ___ The opinion of the candidate's class companions, given in a secret and personal form, in which positive or negative opinions

and reasons concerning the suitability of the candidate are clearly expressed.

Capuchins peers _____

Diocesan peers _____

- j. _____ The outcome of canonical banns proclaimed a sufficient length of time in advance in the parishes where the candidate has had extended residence and ministry (can. 1051:2).

- C) The Provincial Minister with the recommendation of the Commission for Orders and Ministries and the consent of his Provincial Council decides on the brother's request.

- D) The brother and the Post-Novitiate Director together plan the diaconate ordination, along with the ordaining bishop.

- E) If a brother is refused ordination by the Provincial Minister because of substantial weaknesses in his preparedness, he may re-apply again in one year, presuming he has addressed the appropriate concerns.

- F) Before diaconate ordination, the brother must make a Profession of Faith (to his Provincial Minister) and sign a document of Freedom for Diaconate Ordination, which is placed in his Provincial File along with the Document of Ordination.

ORDERS AND MINISTRIES

Some Guidelines for the Preparation of Reports Concerning Promotion to Orders (can. 1029)

1. Physical health and mental balance. Sufficient human maturity. Any negative precedents in the family as to mental health, alcoholism, or drug addiction.
2. Natural virtues: honesty, spirit of hard work, prudence, constancy, firmness of convictions, spirit of sacrifice and of service, ability to get along with others and work with them (cf. cann. 245:2; 275:1).
3. Doctrine: knowledge of Catholic doctrine and adherence to it. Orthodoxy of faith. Firm convictions concerning positions contrary to the Magisterium as advanced nowadays by certain groups, such as, for example, radical ideologies, the ordination of women, certain opinions regarding sexuality morality and ecclesiastical celibacy. Understanding of the nature and purpose of the ecclesiastical ministry.
4. Studies: interest in ecclesiastical studies; success in examination in this field. Love for Sacred Scripture. Interest in formative reading. Concern to know the documents of the Magisterium of the Church. Ability to exercise the ministry of the word (can. 762).
5. Obedience: readiness to accept decisions of superiors. Confidence in the hierarchy of the Church. Observance of the Church laws (can. 273).
6. Behavior regarding material good: respect for the good of the Church; detachment; moderation in use of own goods; sensitivity to the poor and those who suffer (can. 282:1).
7. Celibacy: clarity of ideas on its nature and positive significance. Full acceptance of celibacy not only as an unavoidable condition for receiving Orders. Sufficient affective maturity and clarity of male sexual identity (can 1024). Balanced behavior towards women: prudence, emotional self-control, propriety of behavior. Language, conversation, addiction to television (cann. 277:2; 285:1-2).
8. Supernatural virtues: spirit of faith, love for Jesus Christ and the Church, practice and spirit of prayer, love of the Blessed Virgin Mary. Love for the Eucharist and daily participation at its celebration. Celebration of the Liturgy of the Hours. Recitation of the Holy Rosary. Regular recourse to the Sacrament of Penance. Apostolic zeal. Love of Liturgy. Spirit of self-denial and mortification (cann. 245:2; 246).
9. Balanced judgment in evaluating situations and making practical decisions in consequences. Capacity for rational planning.

10. Community spirit: ability to get along with others and work with them. Readiness to accept rational planning of work. Sensitivity in the face of suffering and misery of others.

11. Presence of defects: duplicity? selfishness? avarice? ambition? lack of regard for celibate chastity? arrogance? lack of honesty? difficult character? laziness? lack of responsibility? stubbornness? socioeconomic resentment? personal untidiness? excessively active? comfort-seeking? concern for material advancement of own family? aggressiveness? hypocrisy? alcohol or drug addiction? abnormal affective tendencies? effeminate manner? pride? individualism?

12. Spiritual direction: if regular and with whom (cann. 239:2; 240:1).

13. Other observations.

14. Overall judgment regarding acceptance of the request for admission to Orders.

- A) The brother must have completed his diaconate ministry program and the remaining diaconate studies required by the theological institution and the Province.
- B) The brother makes known to the Post-Novitiate Director his desire to request priesthood ordination, and presents his request in writing to the Provincial Minister.
- C) The Post-Novitiate Director presents to the Province's Commission for Orders and Ministries the pertinent documents, evaluations, and recommendations. (See *modus operandi* for the Commission in the above Appendix V: Process, Requirements and Celebrations for Ministries.)

Checklist for Application to the Priesthood:

- A written request of the candidate with which he asks to be admitted to the rite. It is necessary that this request be composed by the candidate personally and written out in his own hand and may not be a copied formulary, or worse, a photocopied text (cf. can. 1034 § 1).
- An academic report from school or seminary attended.
- A personal report of the director of the house of formation. The report must be detailed, making use of the general lines of the model found in Enclosure V (cf. can. 1051, 1°).
- A collegial consultation of the priests entrusted with the formation in the house of formation.
- Evaluations and recommendations from the fraternities in which the brother has lived during his theological and ministerial training.
- A consultation of the candidate's own pastor.
- A consultation of the priest in charge at the place or in the institution where the candidate assists in the pastoral work.
- Other information that the director of the house of formation considers necessary to gather.
 - a) Ministry Evaluations
 - b) Testimonies
- The opinion of the candidate's class companions, given in an absolutely secret and personal form, in which a positive or negative opinion concerning the suitability of the candidate is expressed clearly, together with reasons for that opinion.
 - a) Diocesan
 - b) Capuchin peers
- The outcome of the canonical bans proclaimed a sufficient length of time in advance in the parishes where the candidate has had extended residence (can. 1051 2°).

- D) The Provincial Minister meets with the brother and the Post-Novitiate Director to review the brother's diaconate experience, his academic courses and evaluations, his ministry evaluations and any other testimonies from his diaconate ministry and the recommendation of the Commission for Orders and Ministries.
- E) The Provincial Minister, with the consent of his Provincial Council, decides on the brother's request for priesthood ordination.
- F) If the request is approved, the brother, the Post-Novitiate Director and the Provincial Minister plan the ordination in dialogue with the ordaining bishop.
- G) Previous to the brother's priesthood ordination, he must make a Profession of Faith (to his Provincial Minister) and sign a document of Freedom for priesthood ordination, which document is placed in his provincial file along with his Document of Priestly Ordination.

APPENDIX Z: WORK AND MINISTRY PLACEMENT AND MENTOR

These are the process and guidelines for the placement of the new worker or minister, and selecting a mentor for him, in the Capuchin Province of Mid-America.

A. Placement

Prior to any first assignment, the Provincial Minister meets with the local fraternities that are being considered as possible sites for the brother's placement, to discuss with them the implications of the placement.

What special demands might be expected of such a fraternity? What kinds of support and training may be necessary? Is the community willing to accept the various responsibilities of such a placement?

Based on the information received, the Provincial Minister and his council make their decision.

B. Work or Ministry Supervisor

The Provincial Minister visits the immediate work or ministry supervisor (pastor, hospital chaplain supervisor, school principal, health clinic, etc.) to ascertain whether this person is willing to "walk with" a younger colleague.

Will the supervisor agree to meet regularly with the new worker or minister? Spend extra time with him? Agree to clearly define roles and expectations of the new worker or minister and put these in writing in the first month of the assignment? Spell out responsibilities clearly to avoid possible misunderstandings? Can this person, in a non-threatening way, suggest areas of improvement and indicate where skills may be learned?

Based on the information received, the Provincial Minister makes his decision.

C. Mentor Relationship

The new worker or minister chooses a mentor, to help him in the role of a non-evaluative growth supervisor, from several possible persons in the area of his assignment. The mentor may be a friar; if not, he should ideally be another person sensitive to "Franciscan" ministry. The Provincial Minister has interviewed the mentor ahead of time, and he or she has agreed to serve.

Initial meetings between the worker or minister and supervisor are several times a month; later the meetings should be monthly. The first meeting or meetings clarify the mentor relationship as that of encouraging growth as a Capuchin worker

and minister and helping develop skills in work and ministry. The mentor is encouraged to discuss the following: time management, setting boundaries and limits, problem solving, generating alternatives, conflict management, assertiveness training.

In all this, the mentor discusses the maintenance of structures essential to living a religious life. He or she is a sounding board to help the new worker or minister integrate and express Capuchin values in his work and ministerial setting.

The mentor relationship is expected to last two years.

NOTE: Apart from these policies, the brother who is new in work or ministry is encouraged to take advantage of other programs that may aid in his transition. For example, a newly ordained priest may choose to participate in a diocesan sponsored program for new priests, a brother newly doing social services may choose to join an association of social workers.