



CAPUCHIN FRANCISCANS

PROVINCE OF ST. MARY

Initial Formation Handbook **2023 Edition Ver. 7.1**

Table of Contents:

Job Descriptions:	3
Vocation Director	3
Postulant Director	5
Post-Novitiate Director	7
Priestly Formation Director	9
Vocations Program:	11
Residential Candidacy Program	19
Summer Pre-Postulancy Program:	25
Postulancy Program:	27
Novitiate Program:	30
Post-Novitiate Program:	31
Year of Integration	38

Priestly Formation Program:	43
Documents for Formation:	
Appendix A: Evaluation Process: Postulancy	48
Appendix B: Mid-Year and End of Year Evaluation: Postulancy	50
Appendix C: Supervisor Ministry Evaluation: Postulancy	54
Appendix D: Reading List for Franciscan Topics During Post-Novitiate	56
Appendix E: Mid-Year Evaluation: Post-Novitiate, Year of Integration	57
Appendix F: Mid-Year Evaluation: Post-Novitiate	62
Appendix G: Post-Novitiate Academic Year End Evaluation	67
Appendix H: Summer Evaluation	70
Appendix I: End of Year Ministry Evaluation: Post-Novitiate	71
Appendix J: Solemn Vow Discernment Tool	73
Appendix K: Ministerial Skills for Post-Novitiate Friars	75
Appendix L: Duties and Tasks of Priests: A Pastoral Assessment	78
Appendix M: Letter to the Provincial Requesting Perpetual Profession	83
Appendix N: Procedural and Ceremonial Checklists for Temporary Simple Profession and Perpetual Solemn Profession of Vows	84
Appendix O: Procedure for Admission to the Priesthood in the Province of St. Mary of the Capuchin Order	88
Appendix P: Ordination to the Priesthood Checklist	92

Documents Maintained by Provincial Secretary for Initial Formation

Appendix AA: Declaration of Freedom and Intent Before First Profession	96
Appendix BB: Document of First Profession	97
Appendix CC: Document for Conferment of Lector / Acolyte	98
Appendix DD: Document of Renewal of Temporary Vows	99
Appendix EE: Letters to the Provincial Requesting Perpetual Profession	100
Appendix FF: Letter Concerning the Renunciation of Goods & Conveyance of Property	101
Appendix GG: Disposition of Property	102
Appendix HH: Last Will and Testament	103
Appendix II: Declaration of Freedom and Intent Before Perpetual Profession	106
Appendix JJ: Document of Solemn, Perpetual Profession	107
Appendix KK: Notification of Perpetual Religious Profession	108
Appendix LL: Dimissorial Letter: Diaconate	109
Appendix MM: Dimissorial Letter: Presbyterate	110
Appendix MM: Profession of Faith Before Ordination to the Diaconate	111
Appendix OO: Oath of Fidelity Before Ordination to the Diaconate / Presbyterate	112
Appendix PP: Notification of Ordination to the Diaconate / Presbyterate	113

Note to the reader:

Throughout the handbook, “director” may refer to both co-directors if the position is shared.

Vocation Director: Job Description

The following skills, abilities, and experiences are desirable in the composite vocation office staff:

Skills (learned capacities in terms of training programs both professional and academic).

- vocational discernment, recruitment techniques, basic knowledge of social media and posts, basic knowledge of youth and young adult spirituality and culture, ability to work with and lead teams

Abilities (native talents/natural endowments of an individual).

- Public relations.
- Willingness to travel, attend, and give talks for: parish masses and ministry groups, college campus ministry events and retreats, and youth and young adult ministry events, retreats, and conferences.
- Able to communicate to candidates about our Capuchin Life and spirituality

Experiences (personal/community/ministerial experience).

- Effective working with teenagers, young adults (18-35), and adults to the age of 40.

Director's roles and responsibilities:

- Pray for all men discerning Capuchin life and all men in formation.
- Prayerfully and joyfully witness to the beauty of our Capuchin way of life (see *Ratio Formationis* #170)
- Adhere to the guidelines of the formation team and profile of the formator as outlined in the *Ratio Formationis* #165-173.
- Engage in personal spiritual direction and peer supervision for formation.

Other Expectations and Commitments:

- The director is a member of the Formation Council and participates in its meetings and work with the other members of the Council in implementing the initial formation program of the Province.
- The director is responsible to the Provincial Minister and the Provincial Council through the Provincial Director of Initial Formation and with the other members of the Formation Council. The director shall consult with and inform provincial leadership as situations require.
- The director provides a detailed monthly vocations report to the provincial council.
- The director facilitates the process of ongoing discernment and deepening commitment to Christ and his Church for the candidates and inquirers.
- The director shall maintain files on all inquirers and candidates.
- The director shall implement all policies and procedures that affect inquirers and candidates, especially regarding the Residential Candidacy Program.

- The director ensures the proper execution of civil and ecclesiastical documents affecting candidates, especially those required for an application to postulancy.
- The director promotes membership in the Province of St. Mary;
- The director conducts the processing and initial screening of applicants;
- The director maintains applicants' interest in the Province;
- The director assist in the discernment process of inquirers and candidates;
- The director helps prepare applicants to succeed in postulancy;
- The director elicits the cooperation of others for this task;
- The director ensures an adequate number of brothers are trained for the behavior assessment through the NRVC.
- The director attends conferences (SEEK/FOCUS, Steubenville, etc.) for promoting vocations. Invite brothers from the Province to supportively attend and coordinate with other NAPCC provinces on tables and coverage of these events.
- The director works with the NAPCC Vocation Directors to promote Capuchin vocations and a spirit of fraternity and unity.
- The director works with the Vocations Committee and other members of the Province in promoting vocations and commitment to the Capuchin way of life.
- The director engages in on-going formation through spiritual direction, the sacrament of reconciliation, the NAPCC formators conference, and other continuing education opportunities. Peer supervision is highly recommended.
- The director works with his Vocations Secretary in the organization, artistic direction, creation, and approval of social media posts on our sites.
- Any new Vocation Director shall attend the “Workshop for New Vocation Directors” provided by the NRVC (National Religious Vocations Conference in Chicago). Every summer of his term, the Vocation Director should attend additional workshops with the NRVC to update his knowledge and understanding of his ministry and the people he will be helping discern our Capuchin Franciscan religious order and way of life.

Postulancy Program Directors: Job Description

The following skills, abilities, and experiences are desirable in the composite postulancy staff:

Skills (learned capacities in terms of training programs both professional and academic).

- Group Dynamics
- Theological Reflection
- Adult Education
- Able to assist others in the integration of personal, social, and prayer experience
- Able to assist others in vocational discernment

Abilities (native talents/natural endowments of an individual).

- Prayerful
- Adaptable/flexible
- Relatable with variety of personalities/characteristics/differences

Experiences (personal/community/ministerial experience).

- A variety of Capuchin/ministerial experiences

Roles and Responsibilities of the Postulancy Directors:

- Serve as members of the Formation Council and participate in its meetings and work with the other members of the council in implementing the initial formation program of the Province.
- Are responsible to the Provincial Minister and the Provincial Council through the Provincial Director of Initial Formation and with the other members of the Formation Council. The directors shall consult with and inform provincial leadership as situations require.
- Facilitate the postulants' process of ongoing discernment and deepening commitment to our Capuchin way of life.
- Maintain formation files on all postulants.
- Implement all policies and procedures that affect postulancy.
- Ensure the proper preparation for rites and the proper execution of civil and ecclesiastical documents affecting postulants, e.g., release of the Province from liability, etc.
- Correspond with candidates entering postulancy, notifying them of information relative to their moving into the program.
- Obtain adequate ministry sites to fulfill the requirements of the program in this area.
- Arrange for adequate orientation to the various possible locations for ministry.
- Coordinate ministry for each postulant.
- Remain in touch with each of the contact persons and supervisors (if different) at ministry sites.
- Facilitate reflection on experiences through theological reflection.
- Give, coordinate, or provide for input in each of the areas required by the procedures of the program.
- Coordinate and conduct evaluations according to the procedures of the program.
- Following the evaluation process and consultation with the perpetually professed friars of the local community, make a recommendation to the Provincial Minister for each postulant seeking admission to the novitiate.

- Coordinate the relationship between the postulancy program and the local Capuchin community.
- Regularly inform the postulants of their progress in the program.
- Introduce the postulants to elements of our life as is needed.
- New postulancy directors shall attend within the first year of appointment a training program on human sexuality and committed celibacy with a minimum of 10 meeting hours. Postulancy directors shall renew this training a minimum of every five years. Training or continuing formation may be available through organizations like the St. Luke Institute or schools like Catholic Theological Union.

(*) N.B. The term "ministry" is not used above in its ordinary sense. In the context of the postulancy program, "ministry" means "experience gathering" for the purpose of theological reflection.

Post-Novitiate Formation Director: Job Description

The following skills, abilities, and experiences are desirable in the Post-novitiate/Ministry Formation staff:

Skills (learned capacities in terms of training programs both professional and academic).

- Collaborative leadership.
- Conflict management and resolution.
- Knowledge of Ecclesial teachings and structures.
- Knowledge of Franciscan/Capuchin tradition and history.
- Familiarity with educational institutions and their operations.
- Contemporary understanding of pastoral ministry and the apostolate.
- Communication, both oral and written.
- Administrative – planning, implementing, and enforcing programs/processes/procedures.
- Able to give and receive criticism.

Abilities (native talents/natural endowments of an individual).

- Prayerful
- Adaptable/flexible
- Relatable with a variety of personalities/characteristics/differences

Experience (personal/community/ministerial experience).

- Experience living and ministering in the Province and among the brothers – esp. on Provincial Committees.
- Administrative and teamwork experience.
- Solemnly professed for more than 5 years (for position of Director)
- Previous formation experience is not essential; however, the brother considered for the position of director should demonstrate a strong commitment to the life and rule of the Friars Minor and the Constitutions of the Capuchin Order.

Duties and Responsibilities of Director

- Pray for all men discerning Capuchin life and all men in formation.
- Prayerfully and joyfully witness to the beauty of our Capuchin way of life (see *Ratio Formationis* #170)
- Adhere to the guidelines of the formation team and profile of the formator as outlined in the *Ratio Formationis* #165-173.
- Facilitate the process of ongoing discernment and deepening commitment to our Capuchin way of life for the friars in post-novitiate formation.
- Responsible to the Provincial Minister and the Provincial Council through the Provincial Director of Initial Formation. The director will consult with and inform provincial leadership as situations require.
- Member of the Formation Council *ex officio*

- Regularly meet with the temporarily professed friars to assess and discuss their progress in all phases of formation: charismatic, human, spiritual, intellectual and missionary-pastoral, as well as their fraternal life in community.
- Implement all policies and procedures that affect post-novitiate formation.
- Give, coordinate, or otherwise provide for input in each of the areas required by the procedures of the program.
- Facilitate on-going relationship between Post-Novitiate, the Ministry Formation Program, and the members of the Province of St. Mary.
- Discuss ministerial opportunities with temporarily professed, coordinate ministries with supervisors and directors of programs and assist formation friars with fulfilling prerequisites, scheduling, and commitment availability.
- Remain in contact with each of the supervisors/directors at the locations for ministries.
- Facilitate reflection on experience through theological reflection.
- Coordinate and conduct evaluations according to the procedures of the Post-Novitiate and the Ministry Formation Program.
- Conduct annual evaluations of each friar in post-novitiate formation specifically addressing his suitability to renew his temporary vows or to make his perpetual profession of vows. A copy of evaluations will be kept in each individual's formation file, and a copy will also be sent to the Provincial Minister.
- Maintains *copies* of formation files on all friars in post-novitiate formation, sending original documents to the Provincial Minister via the Provincial Secretary for review and permanent filing.
- Facilitate and ensure the Provincial Secretary is duly and timely consulted regarding the proper preparation for rites and the proper execution of civil and ecclesiastical documents affecting friars in Post-Novitiate Formation, (e.g., renewal of vows, perpetual profession, and ordination).
- In consultation with the PDIF, facilitate and ensure that the proper agents are informed of responsibilities and expectations regarding liturgical rites and celebrations for friars in formation.
- Ensure proper budgeting and accounting for simple and solemn professions.
- Consult regularly with provincial agents (e.g. Provincial Minister, Provincial Director of Initial Formation, et al.), discern and determine with the friars in post-novitiate their living, educational, and ministerial plans during their post-novitiate experience.
- Coordinate summer Franciscan workshops in the four-year rotation (Intellectual, Legislative, Spiritual and Pastoral)
- Work with novitiate staff in receiving files from the novitiate as well and discuss relevant issues to ensure proper transfer of information, an accurate understanding of formation issues, and a formation process for each friar.

Priestly Formation Director

Job Description

The following skills, abilities, and experiences are desirable in the Post-novitiate/Ministry Formation staff:

Skills (learned capacities in terms of training programs both professional and academic).

- Collaborative leadership.
- Conflict management and resolution.
- Knowledge of Ecclesial teachings and structures.
- Knowledge of Franciscan/Capuchin tradition and history.
- Familiarity with educational institutions and their operations.
- Contemporary understanding of pastoral ministry and the apostolate.
- Communications, both oral and written.
- Administrative – planning, implementing, and enforcing programs/processes/procedures.
- Able to give and receive criticism.

Abilities (native talents/natural endowments of an individual).

- Prayerful
- Adaptable/flexible
- Relatable with a variety of personalities/characteristics/differences

Experience (personal/community/ministerial experience).

- Experience living and ministering in the Province and among the brothers – esp. on Provincial Committees.
- Administrative and teamwork experience.
- Ordained Priest for more than 5 years (for position of director)
- Previous formation experience is not essential; however, the brother considered for the position of director should demonstrate a strong commitment to the priesthood.

Directors' Duties

- Pray for all men discerning priesthood.
- Prayerfully and joyfully witness to the beauty of our Capuchin priesthood.
- Facilitate the process of discernment and readiness for the ordination to the diaconate and priesthood while the candidate deepens his commitment to our Capuchin way of life in preparation for the priesthood.
- Responsible to the Provincial Minister and the Provincial Council through the Provincial Director of Initial Formation. The director will consult with and inform provincial leadership as situations require.
- Member of the Formation Council *ex officio*
- Regularly meet with the priesthood candidates to assess and discuss their progress in all phases of formation: charismatic, human, spiritual, intellectual and missionary-pastoral.
- Implement all policies and procedures that affect the Priestly Formation Program .
- Give, coordinate, or otherwise provide for input in each of the areas required by the procedures of the program.

- Discuss ministerial opportunities in conjunction with Director of Post-Novitiate with temporarily professed, coordinate ministries with supervisors and directors of programs and assist formation friars with fulfilling prerequisites, scheduling, and commitment availability.
- Remain in contact with each of the supervisors/directors at the locations for ministries.
- Facilitate reflection on experience through theological reflection.
- Coordinate and conduct evaluations according to the procedures of the Priestly Formation Program.
- Maintains *copies* of formation files on all friars in preparation for the priesthood, sending original documents to the Provincial Minister via the Provincial Secretary for review and permanent filing.
- Facilitate and ensure that the Provincial Secretary is duly and timely consulted regarding the proper preparation for rites and the proper execution of civil and ecclesiastical documents affecting ordination.
- In consultation with the PDIF, facilitate and ensure that the proper agents are informed of responsibilities and expectations regarding liturgical rites and celebrations for candidates for the priesthood.
- Ensure proper budgeting and accounting for diaconate and priestly ordination.
- Consult regularly with provincial agents (e.g. Provincial Minister, Provincial Director of Initial Formation, et al.), discern and determine with the friars in post-novitiate their living, educational, and ministerial plans during their post-novitiate experience.

Vocation Office

From the *Constitutions of the Capuchin Friars Minor*:

In His goodness God calls all Christian faithful in the Church to the perfection of love through different states of life, so that the salvation of the world may be advanced by means of personal holiness. (16.1)

Concern for vocations 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. (17.1)

From the *Ratio Formationis*:

Abraham is the icon of a human being who is open to God. The account of his call emphasizes the key elements in every vocation. First of all, the human person is invited to go out of the closed circle of the known and familiar and to stake his life with trust in God. Secondly, we see that vocation is a dynamic process that activates all the dimensions of the person, especially the relational capacity and the quest for the good. (211)

The image of Abraham reminds us that it is up to every human person to respond to God's call. God has a plan for each one, and invites us to go forward with confidence and to be courageous in our search. Every vocation is a gift of the Holy Spirit to build up the Church and serve the world. It is the task of the Christian community to awaken vocations, to welcome them and cultivate them. We must promote the idea that all are responsible for creating a culture of vocations. (212)

Objectives: To create opportunities for discernment that enable a person to make a free and responsible vocational decision. (215)

To propose pathways for affective growth in the relational style of Jesus, along with the invitation to live the logic of self-gift. (216)

To present a vision of a world founded on the principles of Franciscan spirituality. (217)

Procedures:

The Capuchin Vocations Ministry adheres to the Capuchin Constitutions when accepting men into candidacy program:

From the *Constitutions of the Capuchin Friars Minor*:

The Provincial Ministers are to inquire carefully whether those who are asking to be admitted to our life meet the requirements of universal law, as well as our own, for their valid and lawful admission. In particular, the following must be observed (18):

- a) candidates must be temperamentally suited for the living of our gospel life in brotherly communion;
- b) it is to be ascertained that they enjoy the physical and mental health necessary to lead our way of life;
- c) 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;
- d) it must be evident that they enjoy a good reputation especially among those who know them well;
- e) 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;
- f) 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;
- g) all useful information shall be collected about their previous life, especially in the case of older candidates or those who have already had some experience of religious life;
- h) for the admission of diocesan clergy, or of 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 universal law are to be observed.

From the *Ratio Formationis*:

The spiritual dimension (218):

- offer the necessary help so that the process of vocational discernment results from a personal choice made in faith.
- encourage prayer, the sacramental life, and daily reading of the Word of God.
- the candidate discovers, by looking within himself, a journey of openness to the transcendent and the beauty of creation.

The human dimension (219):

- he expresses an age-appropriate level of self-awareness,
- he allows himself be accompanied on the journey of vocational discernment;
- he shows a desire to belong to a group and the ability to make relationships.

The intellectual dimension (220):

- present the principles and fundamentals of the experience of Christian life,
- offer a first critical approach to the Mystery of Christ;
- begin a first contact with the lives of St. Francis and St. Clare, presenting the values of the Franciscan charism in a simple way.

The missionary-pastoral dimension (221):

- if the candidate is already participating in some pastoral activity, he should be encouraged to continue. If not, some pastoral commitment may be suggested;
- make known, in a general way, the pastoral services and apostolates of the Order, the Province or the custody;
- introduce the practice of reading the Gospel, with emphasis on those texts that most clearly present Jesus' pastoral way of teaching in the proclamation of the Kingdom of God.

The charismatic dimension (222):

- help the candidate to listen to the deep desires of his heart, and his reasons for choosing our form of life,
- make prayer the basic context for vocational discernment,
- present the Capuchin life rooted in sound ecclesiology and within a theology of the religious life that values the vocations of all the People of God.

Candidates are expected to make at least two vocation weekend retreats and/or day of recollections prior to application. They have also participated in any other events hosted by the vocations/provincial ministries such as Dinner and Adoration, friary/parish visits, and Capuchin Mobile Ministries. (Please see information section on retreats)

Candidates are expected to have regular meetings with a spiritual director.

Candidates must be between the ages of 18-40 and have received at least a high school diploma or GED, and currently have a job in order to discern with our Province. While discernment may begin at a younger age, entrance into postulancy is normally for those who are 21 or older.

Candidates are encouraged to visit the friary closest to their place of residence. They are allowed to visit other friaries within the Province upon request and with the permission of the Guardian of the particular friary.

Candidates are expected to discern with the Province of St. Mary for at least six months to a year prior to expressing a desire to apply for postulancy.

Candidates meet regularly with their assigned contact friar or the Vocation Director. The content of these sessions includes growth in knowledge of the Province, growth in self-knowledge, and

mastery of developmental tasks deemed appropriate for this level of formation. These tasks include the following:

- Self-acceptance
- Psycho-sexual maturity
- Emotional maturity
- Inter-personal skills
- Capacity for work/school

It is recognized that we are a supportive community, but not a therapeutic community. We expect men to be aware and capable of managing their own psychological and social issues in a mature and responsible manner while in formation. Outside counseling and meetings (eg: AA) are encouraged, but must not dominate someone's formation process.

Ministry and discernment weekends are organized by the Vocation Director. Friars and others provide the input and assist with meals, social gatherings, etc. for the weekend. The broad goal of the regional weekends is to acquaint inquirers and candidates with the life and ministry of the Province.

Foreign candidates/applicants to the Province of St. Mary:

- Normally, no application from a foreign person living outside the United States will be considered by the Capuchin Vocation Ministry.
- The Province accepts legally documented (i.e., DACA, green card, special visas, asylum, etc.) applicants regarding immigration status into Capuchin formation. The director with consultation from the Provincial Council and legal council should proceed with prudence when working with such applicants.

Reapplication by Former Participants

When former participants in the initial formation program of the Province of St. Mary wish to reapply, the following process shall be implemented:

Applicants will engage in an initial discernment regarding reapplication with the Capuchin Vocation Director.

The Director in consultation with the Formation Council is to make an initial decision regarding whether or not to proceed with the application. If the applicant and the Vocation Director are in mutual agreement to proceed, they shall continue the application process and then make a presentation to the Admissions Board.

The Admissions Board may recommend and/or the Provincial Minister may decide to accept the applicant for an earlier program than to that which the applicant has completed. (In other words, an applicant may be asked, for good reason, to repeat a stage of formation that he has previously completed.)

Applicants with Children and/or Previous Marriages

The Province of St. Mary does not accept candidates whose children are minors or in high school. When an applicant has adult children and/or was previously married¹ his situation shall be reviewed before his application to postulancy by appropriate legal and/or financial experts to determine the legal and/or financial ramifications of the applicant's entrance into the Province. The St. Mary Province Vocation Office shall develop a checklist of issues to be reviewed by these experts. A report of these reviews shall be included in the application materials for postulancy.

Applicants from Other Formation Programs

Whenever an applicant to the Postulancy Program has previously participated in the formation program of another diocese, seminary, or religious order/community, the Capuchin Vocation Director shall secure a written report or create a report based on a phone conversation with the appropriate official/representative of the diocese, seminary, religious order/community about the circumstances of the applicant's departure from and participation in their program. These reports shall be included in a candidate's application file for the Capuchin Postulancy Program.

Preparation for Postulancy Program or Termination of Participation in Candidacy Program

Through dialogue with his contact friar/community and the Vocation Staff, the candidate discerns whether he will apply for postulancy or withdraw from the candidacy program. In making this decision, the candidate and contact friar/community will reflect on the criteria outlined above. The results of this discernment are then shared with the Capuchin Vocation Ministry Staff. It is expected that the candidate enjoys the physical and mental health necessary for community living, that he is Catholic in his faith and that he desires to be a reflective and prayerful person.

If the candidate decides to withdraw from the program, the contact friar/community or the Capuchin Vocation Ministry staff may help the candidate formulate goals for his future.

The Capuchin Vocation Ministry assembles and submits the necessary documents and reports to the Postulancy Admissions Advisory Board to assist in the decision about acceptance to the Postulancy Program.

Requirements for Application:

The Director of Vocations directs those whom he believes have a possible vocation to our life to undergo the application process to the Province.

For those who choose to apply, he obtains from/on each of them the following:

- a) a completed standard application form along with a recent photo.

¹ The applicant must either be a widower or have a declaration of nullity issued at least two years prior to his application.

- b) an autobiography, describing his life and his reasons for applying to the Order.
- c) complete medical, dental, and vision reports.
- d) five letters of recommendation. The letters could cover the person's spirituality, intellectual capacity, physical capacity, ability to make a commitment, and ability to get along with others. At least three of the letters are to be from professional persons, such as the candidate's spiritual director, pastor, employer, etc. Two of the letters may be from a personal relationship, such as a close friend or co-worker. The Director of Vocations makes a record and puts it into the candidate's file: (1) that five letters were received, (2) the names of the persons who wrote the letters of recommendation, and (3) the dates on which they were written.
- e) a recent copy, six months or less, of his baptismal certificate, and any other relevant documentation, i.e., marriage record of parents, transcripts from schools, military discharge papers, etc.
- f) a report on criminal and civil records. (please see information on pg. 16 under Criminal Records and Social Media)
- g) a report that identifies which friars interviewed the applicant, including those who sit on the Admissions Council.
- h) a behavioral assessment psychological evaluation regarding his fitness to enter the Order. (Please see information on pg. 16 under "Behavioral Assessment and Psychological Exam)
- i) If the candidate has previously been in another formation program, the Vocation Director must obtain a letter from that order/community, diocese, or seminary explaining the reasons and circumstances of the applicant's departure.

If the Director of Vocations judges that a candidate's application should not be submitted to the Admissions Council due to concerns raised in the psychological evaluation, he informs the Provincial Minister, who may at that time decline the application. The closed file is annotated as below. The Director of Vocations is responsible for gathering all the above-mentioned documentation and distributing copies to the members of the Admissions Council in time for consideration before their meeting.

Behavioral Assessment and Psychological Test

When a candidate is ready to apply for postulancy he must go through an admissions interview (behavioral assessment). The friar who administers the behavioral assessment must go through proper training and attend a Behavioral Assessment Workshop with the NRVC. The friar consults with the Vocation Director if the candidate should move forward in the application process. Consultation with friars having experience of the applicant is recommended.

A psychological testing report that includes a psycho-sexual history and a behavioral assessment report are required for each applicant to the Postulancy Program. These reports shall remain in the individual's formation file until after the decision for admission to novitiate. These testing results, with the free and informed consent of the applicant, may be released to the Vocation

Director, the Provincial Minister, those directly involved in making the decision for or against admission to postulancy and/or novitiate, the Director of Initial Formation, and the Postulancy Director. Upon the individual's request and with his written and signed consent, these reports may be released to a counselor. After a decision for admission to novitiate is delivered, the psychological report is included in the packet sent to the novitiate team.

Criminal Records and Social Media Check

The Capuchin Vocation Office shall conduct a criminal records check² on all applicants to the postulancy program. Checks shall be made in each area in which the vocation office knows the applicant to have lived as an adult. Results of this criminal records check shall be inserted into the applicant's permanent formation file. Convictions or pending charges will be considered in the application process only to the extent that they substantially relate to criteria regarding admission.

A friar is assigned to also inspect the social media pages of each candidate. The friar is to make sure the candidate has not posted anything that may be deemed morally inappropriate or controversial that may bring scandal to themselves, the Order, and to the Church. Applicants are expected to disclose all social media accounts. Any social media account under an alias that is discovered after acceptance to postulancy may result in expulsion from the formation program.

Educational and Other Financial Obligations Policy

The Province of St. Mary shall assume full financial responsibility for those entering postulancy, according to the normal provincial policies. The Province will also assume educational or other financial obligations of applicants to its Postulancy Program on an individual basis. The following criteria apply:

1. The Provincial Minister decides which loans or other financial obligations will be assumed.
2. Candidates may be asked to enroll in third party programs/ministries that assist in fundraising techniques and skills to lower his financial obligation before entrance to postulancy. Candidates should be in consultation with the Vocation Director for further details on this process.
3. The applicant must complete an "Affidavit as to debts and other financial obligations of applicants prior to admission" form (cf. below under *Forms and Documents Used in Initial Formation*) to be reviewed by the Provincial Minister before the admission meeting to postulancy.
4. If the Provincial Minister agrees to assume educational loans upon entrance into Postulancy, the applicant must work to reduce those debts as much as possible until that

² These include: Criminal, Civil, DMV, National Criminal, and credit checks.

time. If the Provincial Minister determines an applicant demonstrates a lack of good will in this regard, the Provincial Minister may remove his agreement to assume the loan.

5. Upon entrance into Postulancy, the Province will only make payments on the loan as previously scheduled. The Province will not retire the debt immediately, and the loans will remain in the name of the applicant. This procedure will continue until the loan is paid in full, unless the individual holding the loan leaves the Order for any reason.
6. If the individual holding the loan leaves the Order for any reason or is asked to leave the Order by the legitimate authorities of the Province, the Province will discontinue payments on such loans. In this case, the individual assumes responsibility to make all remaining payments. The Province will retain no obligation to make any additional payments on the loan.

Vocation Retreats:

Each candidate is required to attend at least two retreats prior to applying. The Vocation Director coordinates the retreats that help the candidate to discern his vocation. The retreats are designed to help introduce the candidate to the many aspects of our Capuchin Franciscan charism, spirituality, and way of life. The retreats for the year are on an academic calendar beginning in July and ending the following year in April. The Admissions Board normally convenes in May. Following the meeting of the Admissions Board, a postulancy class is established and a new year begins for the Vocation Ministry.

There are several types of retreats offered as an option for candidates to attend:

- 1) Day of Recollection - This retreat is for one day and goes from 8:00am to 2:30pm.
- 2) Overnight Retreat – This is an overnight retreat that typically starts on the evening of a Friday/or Saturday and ends on a Saturday/or Sunday until a little after lunch.
- 3) Weekend Vocation Retreat – This is a three-day retreat that begins on a Friday late afternoon and ends on Sunday after lunch.

All retreats take place at a friary or a retreat center (preferably in a location accessible by public transportation). Weekend retreats also need to be at a friary/retreat center that can provide enough rooms for the candidates and friars helping with the retreat.

Fraternity Visits:

Candidates are encouraged to visit a friary to know the friars within our Province in a more personal way. This would help the candidate with their discernment as they intentionally make the time to get to know more about our Capuchin Life through the friars, prayer, and ministry.

Residential Candidacy Program

1. Nature and Purpose

The candidacy program is designed for individuals who feel the need for further discernment and guidance regarding their vocation in life. This dynamic is placed in a communal setting within the general framework of Capuchin religious life.

Such candidates are invited to live in an atmosphere and setting that supports the individual's need for further maturation, education, faith development, and knowledge of religious life as gained through personal experience. These areas are to be nurtured in a gentle, welcoming manner.

The predominant theme is one of *invitation*: an invitation to a deeper personal relationship with the Lord, leading to clearer direction and purpose of life.

The Candidacy Program maintains its identity as *different* from that of the Postulancy in several ways. First, to a large extent the candidates retain their personal freedom. Secondly, there are no formal classes given to the candidates that would normally be found in the common syllabus of the Postulancy. Thirdly, the candidates participate on a somewhat limited basis within the inner life of the local fraternity. The challenge is to strike a balance between the candidate's autonomy and his personal involvement with the religious community.

The actual duration of the program for an individual participating in it may vary according to personal circumstances, and the recommendations put forward by the local friars in conjunction with the candidacy team and the Formation Council. At the end of each year, the candidate and program will be to determine if the stated goals are being met.

The Residential Candidacy Program falls under the Vocation Office of the Province. The Vocation Director or another director appointed by the Province will maintain regular communication with the candidates.

The Candidate, for his part, and the Province, for its part, recognize and accept that participation in the Residential Candidacy Program creates neither an obligation nor expectation that the candidate will or will be permitted to continue into the Postulancy Program. As participation in the program is completely voluntary it may be terminated, for any reason, at the choosing of either the candidate, the Vocation Director or the Province.

Offering young men, the real possibility of sharing in our life in some way is among the practical means that have been found to be particularly useful, especially in community activities such as prayer, celebration of the Eucharist, meals and work. All these could perhaps be done in houses specially geared to the purpose, with the chance for individuals to be given assistance in personal reflection. (PCO IV No: 60)

2. Inherent Structures of the Program

It should be noted that the following components are designed to initiate and nurture basic values that are common or fundamental to our Capuchin way of life.

Beneath each of the main headings is a detailed explanation followed by various activities or strategies that may further clarify and facilitate the desired goal.

2.1 Living Quarters

Candidates would occupy any of the empty bedrooms located within St. Francis Friary or another friary of the Province.

- House rules will be composed by the local fraternity.
- It is the responsibility of the candidates to keep their living quarters clean.
- The candidates themselves shall provide computers, phones, and other means of communication, if so desired.
- The same internet accessibility used by the local fraternity will be extended to the candidates.
- Ministerial protocol shall be defined and upheld in accord with provincial guidelines and the local diocese.
- A disclaimer document (work, injury, etc.) shall be drawn up and signed.

2.2 Meals

All cooking is done in the main kitchen. Breakfast and Lunch are more “pick-up” style. Dinner is the “main meal” and is usually eaten after evening prayer. Meals taken separately from the local community are financed by the candidates.

2.3 Transport

If a candidate so chooses, he may bring his own vehicle upon entry into the program. Fuel, insurance, road license, and maintenance for a personal vehicle are the responsibility of the candidate. The Capuchin Friars of the Province of St. Mary accept no liability for the vehicles owned or used by the candidates. A candidate in need of a vehicle for purposes directly related to the program shall make the necessary arrangements with the local guardian. In many cases, public transportation may be the best means for travel. In such cases, the candidates will be responsible for their passes, tickets, etc.

2.4 Finance

A certain sense of independence is at the heart of this program. As far as possible, this also includes the financial independence of the candidates. A realistic and comprehensive annual budget for the running expenses of the program must be submitted and approved by the relevant Provincial offices. Members of the Candidacy program shall agree to commit themselves to the guidelines and restraints of such a budget.

The items listed below fall under the financial responsibility of the candidate:

- Medical concerns, including, but not limited to, health insurance, co-pays, medication costs
- Postage, stationary
- Cell phone and computer related charges
- Entertainment

- Special dietary requirements or extraordinary requests
- Clothes, shoes, books, toiletries, personal items

Monthly contribution to the friary for upkeep shall be determined in a discussion between the local Guardian and the individual candidate

2.5 Recreation

Once again, striking a balance between relationships that are too close and too far is the challenge. Creative recreation and spending time with one another is a source of both renewal and inspiration. The candidates should feel welcome to join the local community during periods of recreation.

At other times and for different reasons, the candidates may freely choose to participate in recreation among themselves.

2.6 Work

It must be remembered that the candidates are *inquiring* about our way of life and have now begun their first steps in a long process of learning. Therefore, it would be inappropriate to place upon them duties or obligations not in accord with their state in life. At the same time, work has its own inherent value and worth – especially when viewed within the context of our Franciscan tradition. A few suggestions of where suitable work or duties can be exercised would be in the areas of:

- Domestic chores
- Meal preparation
- Sacristy
- Friary grounds
- Outside employment

2.7 Apostolate

Giving oneself in charitable ways and means provides rich material for both human and faith development. All such ministries must be approved, supervised and evaluated by the friar in charge. Possible areas of involvement are:

- Hospitals, health facilities, nursing homes
- Social services
- Ministry of Caring
- Local parishes

2.8 Prayer Life of the Candidates

Some avenues that help foster spiritual growth are:

- Common, vocal prayer
- Private prayer
- Gospel sharing once per week (if the fraternity practices this custom)

- Theological Reflection once a month (if the fraternity practices this custom)
- Monthly day of recollection (if the fraternity practices this custom)
- Spiritual Direction
- Spiritual Reading

2.9 Studies

While discussion and open dialogue with the Vocation Director and other persons in charge is in progress, the final selection or direction of formal study is left to the discretion and initiative of the candidate. It is the responsibility of the candidate to meet the financial requirements necessary for their own formal education. Different fields of study may be pursued while residing at the friar through:

- Courses in surrounding schools or institutions
- Workshops and seminars that are offered locally
- Correspondence courses, personal study

2.10 Participation in the Prayer Life of the Local Fraternity

The candidates should experience a joyful and enthusiastic welcome to share in the prayer life of the friars.

- Liturgy of the Hours
- Mass
- Readers and Altar Servers

2.11 Participation in the life of the Province as a whole

Provincial gatherings for celebrations and prayer services are prime occasions for the candidates to meet other friars of the Province. This cultivates a positive sense of what it means to belong to a religious community. A few suggested events are the:

- Provincial Days of Recollection
- Annual Province Retreat
- Professions, ordinations, anniversaries
- Parish feast days
- Visitation of friaries and ministries throughout the Province

2.12 Visitors

Remaining faithful to the *Constitutions of the Capuchin Friars Minor*, guests are welcome to visit the candidates remembering that:

- 1) In order to cultivate the silence required for prayer and study and to preserve the privacy of our brotherly life together, the entrance of outsiders shall be regulated with prudence and discretion.
- 2) To safeguard religious life, an enclosure or area reserved for the brothers alone, shall be maintained in our houses.

3) Those who come to our houses shall ordinarily be received in visiting rooms prepared in keeping with the norms of simplicity, prudence, and hospitality. (Constitutions, 95)

Thus, certain rules for inviting visitors to the friary apply:

- Guests are always welcome to join the friars at prayer and liturgies
- No guests are allowed to stay overnight in the friary without the express permission of the local Guardian.
- No visitors are allowed in the private living quarters of the friary. Permission is required to go to public common spaces on the second and third floor.
- Permission is required in order to invite guests to meals. The cook should also be informed.
- Covid and other health protocols will be followed to maintain the safety of the fraternity and the health of Province at large.

2.13 Evaluations

While this is not a formation program, it is important that everyone is aware that Candidacy is a formal program of discernment. As stated above, Candidacy “supports the individual’s need for further maturation, education, faith development, and knowledge of religious life as gained through personal experience.” The Candidate and Director should pay special attention to these areas as a means to discern a genuine vocation. There are no formal written evaluations. It is understood, and expected, that the candidate, the Vocation Director, the local friars and the Admissions Board will incorporate into the discernment process information learned during the Residential Candidacy Program. If the above guidelines are not followed or the Director deems the candidate is exhibiting behavior unbecoming to Capuchin life, the Province may ask the candidate to find an alternative residency.

2.14 Safe Environment, Sexual Harassment, Mandated Reporting and Social Media

The policy regarding support and accountability for candidates who are residing for an extended period in residences owned by the Province of St. Mary is as follows:

1. The Candidate will sign an agreement that includes the following:
 - 1.1 A description of the candidate’s role and expectations regarding his residence in the Province of St. Mary, including any financial arrangements.
 - 1.2 Any work or volunteer assignments and ministries the candidate will be participating in, especially those involving youth.
 - 1.3 An understanding that any violation of the Provincial Safe Environment Policy, Sexual Harassment Policy, Mandated Reporting Policy or Social Media Policy will merit immediate removal of the candidate from the residence in the Province of St. Mary.
2. The Province of St. Mary will provide the candidate with a copy of the Province of St. Mary’s *Policy for Responding to Allegations of Sexual and Criminal Abuse of Minors and Vulnerable Adults, the Mandated Reporter Policy for the Province, the Diocese and the Jurisdiction in which the candidate with reside, the Provincial Sexual Harassment Policy and The Provincial Social Media Policy* and require that the candidate sign a document acknowledging receipt of and agreement to adhere to these Policies. A copy of this signed statement should be kept in the candidate’s file and be easily accessible by the Major Superior or his representative.

3. The appointed Vicar for the Protection of Children and Safe Environment Issues and/or the Province's Victim Assistance Coordinator will provide the candidate with an orientation program regarding the Province's policy on the protection of youth and minors, sexual harassment, social media and mandated reporting.
4. The candidate will complete an educational training program covering basic concepts of the protection of youth, minors and vulnerable adults as well as the State's mandatory reporting requirements at the beginning of the residential candidacy program. The candidate will also complete any educational requirements mandated by the diocese of residence and location of ministry.
5. The Provincial Minister or the Vicar for the Protection of Children and Safe Environment Issues will communicate with any local supervisor assigned to the candidate in his work/volunteer assignments each year of his residency.
6. The Vocation Director, or other friar appointed by the Provincial Minister, will be a mentor/supervisor within the Province and the Provincial Minister, or an appointed representative, will meet with said mentor/superior each year of the candidate's residency.
7. Whenever possible, the candidate is expected to participate in the Province's fraternal life, including:
 - 7.1 Community Eucharist, fraternal prayer and meditation;
 - 7.2 Meals, social gatherings and local fraternity chapters when invited;
 - 7.3 Provincial Profession/Ordination celebrations, Chapters, regional meetings, prayer gatherings, and social events.

Summer Pre-Postulancy Program

The Goal of the Program

- (1) To give postulants of the Province of St. Mary a tangible encounter with our friars and our mission.
- (2) To help continue the formal “on-boarding” process that each postulant must make as a member of the Province, all before heading to the Midwest.
- (3) To begin to live the basics of Capuchin life through praying the breviary and living in fraternity. This is accomplished by means of fraternal visits to the various fraternities and apostolates of our Province and meeting with the appropriate Provincial staff members.

The Length of the Program

The program will last for approximately one month, from about the last week of June until the third week of July. At the end of the third week of July the postulants will then journey to Milwaukee. Ideally, the pre-postulants will attend the first profession of vows

Location

A friary is selected at the discretion of the program director in consultation with the Formation Council and the guardian of the proposed site. Regardless of location, the pre-postulants will participate in the life of the fraternity which includes, but is not necessarily limited to, fraternity prayer, recreating (whatever form that might take) and meals. The fraternities to host the pre-postulant program must be willing to be present and attentive to the pre-postulant and the director (as far as they are able).

The duties of Director of the Pre-Postulancy Program

The Formation Council will propose one or two potential directors to be approved by the Provincial Council no later than March of the upcoming Summer. The director serves as the mentor of the pre-postulant(s) during this time. He will coordinate visits to various fraternities, facilitate a retreat for the men in formation, and arrange meetings with the necessary Provincial staff members. If possible, he should live on-site with the pre-postulant. He will also work to secure transportation to move about the Province with the postulant(s). The program can be run with co-directors each taking one week of leadership.

Potential Activities and Events

The program will vary in regards to the activities and events. The director will be responsible for determining the most effective way to spend the month in the Province of St. Mary.

Some necessary talks/classes that should be addressed during this time include:

- Basic/brief orientation classes on topics such as the breviary, necrology, roles of guardians and vicars, etc.
- Communication of basic expectations about communication, punctuality, cooking/cleaning, etc. are also helpful conversations to have during this time.

- On-line Capuchin resources such as Cap-dox, www.ofmcap.org, Constitutions, etc.

Other potential activities:

- Participate in the fraternal and prayer life of the host friary.
- Visit various friaries:
 - Meet the provincial delegate for Safe Environment requirements.
 - Ensure insurance and other administrative forms are completed.
 - Tour of Sacred Heart Church and the Heritage Room in Yonkers
 - Prayer and meals with different friaries.
- Week long retreat with other men in the formation process
- Attend CFM summer events
- Send-off gathering at St. Clare friary

The Postulancy Program

The current collaboration agreement between the Province of St. Mary, Sacred Stigmata, St. Joseph, and Mary Mother of God has determined the Postulancy program will be ordinarily at Saint Francis Monastery in Milwaukee, WI.

Postulancy ordinarily begins in July.

Any professed brother who wishes to reside in the postulancy community is expected to follow the guidelines listed below.

Each brother must be able and willing to join in the community prayer practices of the postulancy, including the scheduled celebrations of the eucharist, liturgy of the hours, and daily period of group meditation.

Community life is emphasized during this year. Any friar living in the postulancy community is expected to regularly be present and participate in the evening meal, community recreation and community meetings.

A simple lifestyle is stressed. While some ministries may require the regular use of a vehicle, it is encouraged that when a brother is not ministering the car he usually uses be available to other community members. In accord with this principle, each member of the community (friars and postulants) receives the same amount of monthly allowance. However, requests for additional money for specific needs may be made to the local minister.

Evaluation of the postulants is a critical aspect of the postulancy program. Each friar is expected to participate in this process. This requires more than good will; an ability to affirm and challenge regularly is very important. Postulants are evaluated by their peers, the professed members of the house, and the directors of the Postulancy Program twice a year. See Appendix A for the evaluation tool based on the *Ratio Formationis*.

Candidates applying for admission to the Postulancy Program must demonstrate their desire to live our life and their suitability for our life. Criteria for admissions is based on Constitutions 18 and includes that the applicant:

- Enjoys good physical and mental health.
- Has a basic knowledge and understanding of the Catholic tradition.
- Possesses the ability and desire to be prayerful and reflective.
- Is debt-free, according to the norms and policies of the Province.
- Possesses the functional English reading and writing skills necessary to succeed in the Postulancy Program and subsequent life in the Province.
- Has sufficiently mastered the developmental tasks that will allow him to get full benefit from the postulancy/novitiate experiences. These tasks include:
 - Self-acceptance:
 - The candidate has come to know himself and is free of serious blind spots in his self-knowledge.
 - The candidate values and prizes his gifts and abilities and graciously accepts human limitations.
 - The candidate is committed to continual growth both in using his potential and overcoming his defects.
 - Psycho-sexual maturity:

- The candidate demonstrates a peaceful acceptance of himself as a sexual person who freely and healthily accepts the consequences of vowed celibacy.
- The candidate is reasonably secure in his belief that he can integrate his sexuality and express sexuality in positive, life-giving ways.
- Emotional maturity:
 - The candidate is aware of his emotional states and deals with them in appropriate ways.
 - Positively, he is free either to verbalize his feelings or find other constructive ways of expressing them.
 - Negatively, he neither represses his feelings nor acts them out in destructive or otherwise inappropriate ways.
- Interpersonal skills: The candidate shows that he can live wholesomely with others by demonstrating the abilities to:
 - Disclose his thoughts and feelings.
 - Give and receive affirmation.
 - Give and receive constructive criticism.
 - Form and sustain friendships.
 - Spend time in solitude.
- Capacity for work: The candidate freely uses his energies productively and invests himself in meaningful activities that bring him satisfaction. This is demonstrated by:
 - Persistence in difficult tasks.
 - Dependability in doing a job well and on time.
 - Learning from mistakes and failures.
 - Working collaboratively with persons of various genders and cultures.

Age

To be admitted to postulancy the applicant must be 21 years of age. Candidates may not apply after the age of 40. Exceptions to these age norms may be proposed to the Formation Council for re-consideration.

Goals for Psychological Testing

Psychological tests, along with other tools, are used to assess whether the candidate sufficiently possesses the personal qualities and skilled deemed necessary to participate in process of initial formation and the postulancy program. These include but are not limited to the following:

- A mature level of personal and emotional integration
- Personal flexibility
- Capacity for empathy
- Cultural intelligence (adaptability)
- Sufficient psychological health
- Adequate stress management

- Healthy maintenance of social boundaries
- Reasonable self-care
- Accurate self-perception
- Capacity for collaboration
- Psycho-sexual maturity and integration

Vacation

Each postulant is permitted two (2) weeks of vacation following completion of the postulancy program and prior to entrance into novitiate.

The Novitiate Program

The Province continues to participate in the NAPCC common novitiate housed at San Lorenzo Friary located in Santa Ynez, CA. The novitiate, its programs and structures are under the direct purview of the Provincial Ministers of the NAPCC.

https://napcc.net/images/uploads/documents/2017_07_14_NAPCC_Novitiate_Manual.pdf

The Post-Novitiate Program

From the *Capuchin Constitutions*

The 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.

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.

The 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, they are 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 (#32)

During the novitiate and before perpetual profession, the perpetually professed brothers who have lived for four months in that fraternity shall express their opinion and also cast a consultative vote in a manner determined by the Provincial Minister.

The brothers in temporary vows should not be overlooked; they should express their opinion, but do not have a vote. A report on every such meeting, and the results of the voting, if any took place, shall be sent to the Provincial Minister. (Constitutions, Ordinance 2/15)

Moreover, it is ordained that a document of both temporary and perpetual profession shall be drawn up, together with a record of the Brother's age and other necessary information. This document is signed by the professed, by the one who received the profession and by two witnesses. This document, together with others required by the church shall be carefully kept in the Provincial archives; the Provincial Minister shall also record the fact in the register of professions to be kept in the archives. In the case of perpetual profession, the Provincial Minister [1] sends notice of the profession to the pastor of the place where the brother was baptized. (Constitutions, Ordinance 2/16)

From the *Ratio Formationis Ordinis*

The objective of Post-Novitiate formation identified by the *Ratio Formationis Ordinis*:

- To live life in a spirit of freedom and self-giving, which are the foundations of religious consecration.
- To strengthen communication, mutual recognition, transparent relationships and shared fraternal responsibility.
- To give witness to solidarity, justice and truth side by side with those who are suffering (*Ratio Formationis Ordinis*, 278-280)

The Post-Novitiate Program offers friars in initial formation time to deepen their personal relationship with Jesus through conversion, strengthen their commitment to discipleship, and solidify their understanding of Capuchin identity. The program aims to assist the brothers in formation to prayerfully discern their call to make perpetual profession that consecrates them definitively to Christ in the Capuchin tradition. This process is achieved in a variety of ways:

- Modeling our life according to Francis' *Rule*: "the desire above all else: To have the Spirit of the Lord and Its holy activity."
- Intensify one's commitment to the sacramental life, especially through participation in the Eucharist and reconciliation.
- Full participation in the life of the fraternity.
- Growth in human maturity, especially affective maturity, and leadership.
- Ministry that helps the friar engage in the mission of the Church in the Capuchin tradition.
- Further educational/skills training experiences, especially the study of theology, which help them develop talents for fruitful participation in the life and work of our Province and the wider church.
- Spiritual direction and personal formation advisement.
- Regular Franciscan formation and discussion of Franciscan life and values in light of the signs of the times.

Residence

I. Friars in Formation:

- Friars participating in post-novitiate formation shall ordinarily live in the post-novitiate house.
- The post-novitiate staff shall provide a Capuchin formation program within the post-novitiate house. Under the direction of the post-novitiate staff, friars in post-novitiate formation shall take advantage of additional educational, ministerial, and formational opportunities in the geographic area of their house.
- Under the direction of the post-novitiate staff, friars in post-novitiate formation may regularly reside outside the post-novitiate house to achieve a specific formational goal (e.g. year of integration, cross-cultural programs, further Franciscan education, ministry experiences, and Clinical Pastoral Education).
- Because of the importance of fraternal life, absence from the formation house should be limited. Time away is permitted for vacations, retreats, and occasional family and fraternal visits. Attending family weddings and funerals are possible with consultation with the formation director keeping in mind poverty and other constraints and values.

II. Expectations for non-formation friars in the Post-Novitiate House:

- The role of the local fraternity is to provide support and mentorship to the process of formation and discernment.
- Friars living in the house of formation should expect to have further expectations as members of the formation community (i.e., regular prayer and dinner attendance).
- At the end of the academic year (~April/May) the local fraternity will either be consulted by the director of Post-Novitiate to hear input on the progress of the formation friar or will be expected to participate in the scrutiny of a candidate for final vows.

Post-Novitiate Procedures

1. Spiritual Dimension

I. Faith Development

Faith development shall be a continuing thread throughout the entire post-novitiate period. Regular reflection shall be scheduled in the post-novitiate house. Friars in Initial Formation shall help facilitate and initiate these sessions. It serves further development and personal integration of educational and ministerial experiences.

Communal days of reflection and an annual retreat (private or directed) are expected. Please see provincial policies for budgeting.

II. Spiritual direction

Friars in post-novitiate formation are expected to participate in spiritual direction *at least* every month.³ It is suggested that friars incorporate the topics of sexuality, religious vows, discernment, prayer, family, and affective relationships in spiritual direction. Friars in formation should consult with the director for spiritual director approval. Ordination candidates will be expected to see a member of the clergy (diocesan or religious) during theological studies. Typical stipends should be offered.

2. Human dimension

I. Year of Integration after novitiate

- See Year of Integration section of the Formation Handbook

II. Affective Maturity and Leadership

Friars are expected to grow in affective maturity. Affective Maturity includes but is not limited to the following areas:

- Self-awareness (emotional awareness, accurate self-assessment, self-confidence).
- Self-management (emotional self-control, transparency, adaptability, resilience, achievement, initiative, optimism).
- Social awareness (empathy, organizational awareness, service orientation).
- Relationship management (developing others, inspirational leadership, change catalyst, influence, conflict management, teamwork & collaboration).

Resources and formation advising meetings will address these areas of growth:

- Time Management and Initiative

In developing healthy, mature, and adult responsibility, time management and initiative are crucial. The Constitutions state, "...the brothers in training are the principal authors of their own formation, the responsibility for which rests primarily upon them, in trusting collaboration with the formation personnel" (Constitutions of the Capuchin Friars Minor, 40). Thus, friars in formation are expected to actively pursue opportunities for growth

³ A list of spiritual directors is provided to each friar at the beginning of the post-novitiate program.

which requires discipline and good habits. Avoidance of issues (personally and communally), idleness (including irresponsible use of technology), and passivity are to be discouraged.

Our Rule states, “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” (5.1) Thus, excessive work and “busy-ness” should also be discouraged.

III. Psychological Assistance

Psychological counseling may be necessary for friars in formation in need of additional support. Friars may request these services; however, the formation director may also require counseling for the fullness of health.

IV. Addiction & Recovery

Friars in recovery from various addictions should be encouraged to continue with recovery goals. Should a friar need help with an addiction, he is encouraged to seek help and inform the Provincial Minister and/or his director. Brothers who ask for help with an addiction should not assume dismissal from the Order; rather the formation staff will accompany the brother with on-going discernment in light of recovery.

3. Intellectual dimension

The following list of educational requirements is intended to provide a friar with a fundamental understanding of the Catholic faith. Fulfillment of these requirements is always viewed in a balanced relationship to the other components of Capuchin formation. At any time in a friar’s life before perpetual vows, he must have exposure to each of the following educational areas. Courses may be audited or taken for credit. Course selection requires the assessment and approval of the Post-Novitiate Director.

In his *Testament*, Francis writes: “Let those who do not know how to work learn, not from desire to receive wages, but for example and to avoid idleness.” Learning does not always mean academic study. While ordinarily we expect friars to finish an undergraduate degree, this is not necessary for all friars. Taking into consideration a brother’s age, life experience, and academic aptitude, the Post-Novitiate Director, in consultation with the Formation Council, will determine the specific academic requirements.

Ordinarily, the following will be required topics of study:

- Introduction to theology
- Introduction to Old Testament
- Introduction to New Testament
- Christology
- Ecclesiology
- Theology of Eucharist
- Moral theology
- Public speaking

- Cross cultural competency

4. Charismatic dimension

In addition, the post-novitiate program offers opportunities to explore the topics of Franciscan life. This is done both through monthly fraternal meetings on topics devoted specifically to Franciscan life as well as personal enrichment with provided Franciscan resources. Capuchin history, spirituality, and tradition should be diligently studied and pursued. See Appendix A for expected and recommended reading material for this topic.

If possible, friars in post-novitiate should make every effort to attend the summer workshops at St. Bonaventure. Furthermore, a summer workshop should be offered annually for all those in formation. These workshops are led by qualified Franciscan resource persons and are on a rotation focusing in four areas:

- Intellectual (Bonaventure, Scotus and John Dunleavy),
- Legislative (Constitutions),
- Spiritual (Franciscan Prayer, Admonitions, and Ministry – Integration),
- Pastoral (Missionary spirit, Franciscanism in the 21st century).

5. Missionary-pastoral dimension

Ministry for every friar is rooted in the baptismal call and the Gospel injunction, “whatever you did for one of these least brothers and sisters of mine, you did for me.” (Matt 25). As Capuchin Franciscans we bring a certain spiritual nuance to ministry. It is important that the friars in post-novitiate continue to develop basic ministry skills and dispositions necessary for all ministries in the Church which began in both postulancy and novitiate. Both lay and clerical friar it is essential that every friar have proficiency in basic important ministry concepts. The four areas of post-novitiate ministerial formation are:

1. Witnesses to Gospel Life
2. Engages with Issues of Justice, Peace and Integrity of Creation;
3. Leadership and Affective Maturity
4. Cross Cultural Competency

In consultation with and under the direction of the post-novitiate formators, each friars chooses a ministry. Ordinarily, *at least* the first two years (including the Year of Integration) of ministry focus on direct service to the poor/vulnerable/marginalized in society. The primacy of parochial/ecclesial ministry should be undertaken during theological studies. This ministry should entail 8-10 hours per week, have a suitable supervisor, and the supervisor is expected to evaluate the friar twice a year (see Appendix I). The supervisor and post-novitiate friar will draw a contract with specific goals and objectives approved by the formators.

Further, it is the responsibility of the friar engaged in formation to make available to the director of ministry formation all evaluative records obtained while in the program, such as academic grades, field education evaluations, CPE evaluations, evaluations of internship for priesthood, and general evaluations by the institution of formation.⁴

⁴ These records are confidential; upon the termination of the program, certificates such as installation to the various ministries, evaluations, and all other files pertinent to the friar in formation are to be forwarded to the personnel office, academic records are forwarded to the Provinciate.

Friars regardless of ordination track will be expected to petition the Provincial Minister for the reception of the ministries of Lector and Acolyte in their respective time frames. Friars should be sufficiently prepared to exercise these ministries during the years of formation.

Other considerations:

- Safe Environment
 - Adhere diligently to Safe Environment policies and promptly complete training exercises.

From the *Ratio Formationis Ordinis*:

- “Work: the post-novitiate is the right time to know and experience the different forms of work that are possible in the Order. The ultimate criterion of discernment can be neither the self-realization of the individual nor institutional needs, but the will of God the Father” (288).
- “The economy: we must adopt stronger, more transparent criteria for the use of our resources, living in solidarity with one another and with the poor, consuming responsibly and an economy that is socially aware. It is desirable that the brothers take part in drawing up the fraternity budget” (289).
- “Justice, peace, and ecology: living a simple, plain lifestyle, let the postnovices practise dialogue and respect and learn to value diversity. Love for Christ should result in a desire to build peace and embrace the cause of the Kingdom in favour of the poor” (290).
- “Communications media and new technologies: we need to promote a critical sense in the proper use of the social communications media. It is appropriate to organize specific courses and seminars, to draw up directives in the different cultures and to assess the possibility of creating and managing resources for pastoral work and evangelization using the new technologies” (291).

The Process of Evaluation

- See the Appendix evaluations of the Formation Handbook for:
 - Mid-year evaluations
 - End-of-year evaluations.
 - Ministry supervisor evaluations

Letters requesting perpetual profession

After a period of at least three years of temporary profession, a brother may petition for perpetual vows. The friar should first make his desire known to the formation staff that he has discerned his call and readiness for the commitment. With the consent of the formation staff, the friar may begin the process for requesting solemn vows. The process begins with the friar reflecting on his spiritual life, experience in Capuchin formation and his call from God (See Appendix J: Solemn Vow Reflection Tool). Once this is complete and discussed with the formation staff, the procedure for formally requesting perpetual profession requires two letters to the Provincial. The first letter should be handwritten asking for approval and indicating freedom (see Appendix M: Letter to the Provincial Minister Requesting Perpetual Profession). The second letter can be typed. The second letter should address the friar’s personal

understanding of his vows in the context of Capuchin life. It should reflect the friar's personal call as well as his belonging to the Order (specifically in the Province of St. Mary). The letter should be submitted to the formation staff for consultation before physically sending both letters to the Provincial Minister. A copy of the letter is placed in the post-novice's formation file.

Scrutiny

This shall be conducted in accordance with the norms of the Constitutions (Ordinance 2/15).

Solemn Profession Retreat

After approval for perpetual profession of vows, the friar shall make a retreat according to the norms of the Constitutions (#33.6). This may serve as the friar's annual retreat.

Solemn Profession Liturgy

See Appendix N: Procedural and Ceremonial Checklists for Temporary Simple Profession and Perpetual Solemn Profession of Vows for roles and responsibilities.

Year of Integration

Introduction:

With the collaborative Postulancy with St Joseph, Sacred Stigmata, and Mary, Mother of the Good Shepherd currently in Milwaukee, a Year of Integration would be beneficial for the follow reasons:

- Keep the integrity of the novitiate. Currently, novices are distracted by applying for school during the novitiate which requires taking GRE, writing essays, obtaining school transcripts, etc.
- Help newly professed friars integrate their experience of structured prayer of the novitiate by developing lasting personal habits of prayer in a less structured fraternal life of full-time ministry.
- Deepen a Capuchin identity through fraternity and ministry without the pressures of performing academically and competing for grades.
- Deepen a Provincial identity with freedom to travel and visit friaries and attend Provincial events – especially needed after being away for the first two years.
- Extending time of discernment before large investment of financial resources into studies.
- Formational and human development issues are often raised during novitiate that are not fully attended to during demanding, full-time academic studies. A year before studies could give time and space to more adequately address some of these human formation issues.

Goals:

- Integrate Prayer life of Novitiate into active life of ministry.
- Greater introduction to the Province and to the rhythm of a Provincial fraternity.
- Deepening a Capuchin Franciscan identity and sense of “belonging-ness” – especially as a vowed member of the Province.
- Full-time Capuchin ministry (can also minister part-time at a ministry site in the local community).
- Discern/Test vocational call (both the newly professed and the Province).
- To grow in Leadership and Affective Maturity:
 - **Leadership** which includes the following areas: Mentoring others, inspire & guide individuals and groups, manage conflict, practice accurate self-assessment, pursue growth in affective maturity, collaboration, practice organizing a community, situationally aware & take initiative.
 - **Affective maturity** refers to maturity of affection in which our affections and desires find their fulfillment in Christ. Affective maturity is our emotional and subjectively experienced feelings as a mature adult. This means that we are not controlled by our emotions, but that we are aware of them, learn from them, and integrate them in our relations with others and with the world. (For document from Institute for Priestly Formation: https://priestlyformation.org/site_files/PDFs/Faculty%20Articles/Msgr%20Dan%20Trapp/Msgr%20Trapp%20-%206th%20post%20with%20banner.pdf. This definition also applies to lay brother candidates.)
- Being able to relate to a wide range of people (men and women, young and old, rich and poor, traditional and progressive) in a warm, human way.
 - To a lesser degree, opportunities for learning & using Spanish.

Personal Goals of Friar in Formation

A newly professed friar is to submit personal goals with Formation Staff and local mentor. Goals should take the final evaluation from the novitiate into consideration along with previous evaluations and conversations with Formation Advisor and Spiritual Directors. The newly professed will also develop a Ministry Plan with a weekly schedule in writing for all to sign.

Location:

While having the Year of Integration outside of the formation house in Boston is ideal, we also need to balance the role peers provide in the formation process. The decision on location will be a year by year decision.

Continuing formation/mentoring when the Program is not at San Lorenzo:

- Meet formally once every three weeks with on-site mentor to discuss:
 - 1) How things are going,
 - 2) Where you feel challenged/stretched,
 - 3) Where you see God in the everyday,
 - 4) Areas you might need support
 - 5) Anything else
- Review personal goals

The friar is expected to continue in spiritual direction and growth in human development. When needed, we encourage to begin/continue counseling.

Role of local fraternity (regardless of location):

The role of the local fraternity is to provide support and mentorship to the process of formation and discernment. At the end of the academic year (~April/May) the local fraternity will be asked their overall observations of the friar and their fraternal experience of him. Regular feedback is critical to the formation staff and friar in formation (especially when the Program is not at San Lorenzo).

Role of Formation Staff when the Program is not at San Lorenzo:

Formation staff will check in with newly professed every month to provide fraternal and formational conversation. Formation staff will provide support to the process and take care of finances. Formation staff will coordinate ~monthly meetings on Franciscan and Formation topics including some from the list at the bottom of this document. However, the main work will be done at the local fraternal and ministerial level.

Ministry schedule and responsibilities

This will be determined by the mentor, keeping in mind the friar's capacity and needs.

Finances

If not at San Lorenzo, Room & Board will be offset by the remuneration for services offered in the parish /ministry site. No money will be exchanged.

Monthly day off, birthday, Thanksgiving, Christmas, and summer vacation money comes from San Lorenzo friary. San Lorenzo will cover travel expenses.

Depending on the ministry, the newly professed might be asked to write a grant to Capuchin Food Pantry to compensate for the ministry he offers. Additional Questing is encouraged.

Visiting other friaries

One of the main goals is for the year to get to know the Province and the Province to get to know the friar. We encourage the newly professed to visit other friaries around the Province, to attend professions, ordinations, Fraternity Day, funerals, Provincial retreat and discernment weekends. Possible weeks away could include NYC houses; Interlaken; CT; VT; etc.; visiting senior friars in Yonkers/Beacon; etc.

Other Travel and Ministry:

Possible Spanish Immersion (This may happen in the Summer or other convenient time.)

Visiting friaries in other provinces for workshops/collaboration.

Cross Cultural and Intercultural Formation:

Cross cultural encounters and intercultural formation continues and is guided by the *Ratio Formationis*.

“Training in intercultural awareness is becoming more and more necessary. We all need to learn to accept differences, how to be in relationship with others, and to develop an affective capacity for dialogue. The task of interpreting Franciscan thought within the different cultures is a work in process.” (*Ratio Formationis*, #112)

“The intercultural model, where cultures meet without losing their own identity. Differences blend together and enrich one another, generating new kinds of relationship. The starting point is to know and love one’s own culture so as to be able to recognize the differences of the others. This model is characteristic of the mission of the Church and the way of life of our Order.” (*Ratio Formationis*, Appendix 1, #6)

“The process of intercultural formation takes as its starting point the spirituality of *kenosis*, which requires that differences are recognized and respected; it calls for listening and dialogue, openness and interaction with other cultures.” (*Ratio Formationis*, Appendix 1, #21)

Evaluation process:

Mid-year & end-of-year: 1-1 ½ page written report on: 1) strengths, 2) areas of concern 3) general remarks written by assigned mentor.

The formation staff will make the recommendation to the Provincial Council.

Car

San Lorenzo will not provide a car. We hope the friar will be able to borrow a car when necessary for ministry use. (see above about travel expenses.)

Applying to a program of studies

Before applying to an academic program of studies, the friar's "readiness for studies" must be assessed. Studies are not automatically assumed.

- The friar must request in writing to the Provincial Minister and his Council a desire for academic studies.
- The friar is to explain why *now* is the right time for the Province to invest in his formal education; this should include his sense of call, understanding of his vocation, his desire of and commitment to studies, etc.
- The friar is to identify funding sources and state his willingness to ask/thank donors (Questing)

General Expectations for Newly Professed Friar:

Inform Guardian and/or mentor of your whereabouts in a general way on a daily basis.

Please always ask permission for overnight stays from the Guardian and inform him of your where you will be staying.

Respect and adhere to the friary schedule as much as possible, especially prayer; and excuse yourself if you cannot attend. You should let the Guardian know if you will be absent for meals or follow the local custom in that regard. This can also be done generally given your ministerial commitments.

Call formation staff in regards to extraordinary expenses. Day off money will be given to you by the Guardian.

Alert formation staff and inform the Guardian of any medical issues or problems so that we call can assist as necessary.

Documents for monthly discussions with Formation Staff &/or other friars:

On-going formation in Franciscan spirituality is an essential part of the year. This will also help prepare the friar for future academic reading and writing. Below are some possible books and resources.

- Michael Buckley, *What do you Seek? The Questions of Jesus as Challenge and Promise* (Grand Rapids, MI: William B Eerdmans Publishing Company, 2016).

- Steven M. Southwick & Dennis Charney, *Resilience: The Science of Mastering Life's Greatest Challenges*, 2nd ed. (Cambridge: Cambridge University Publishing, 2018), Chapters 1, 5, 9, and 10
- Julien Green, *God's Fool: The Life and Times of Francis of Assisi*, trans. Peter Heinegg (San Francisco: Harper & Row Publishers, 1983)
- *Defragmenting Franciscanism: Collaboration in a Post Ite Vos Era*, ed. Edward Foley, OFM Cap. (Chicago, Paul Bechtold Library Publications, 2019), Excerpts
 - Optatus Van Asseldonk, "Francis of Assisi, Imitator of Christ Crucified, God and Man, in the Franciscan and Capuchin Tradition" *Greyfriars Review* Vol. 17, No.2, 217-246.
 - Ignatius Brady, "Saint Francis and the Holy Spirit" *Greyfriars Review* Vol. 19, No.3, 199-205.
- Constitutions of the Capuchin Friars Minor
- Robert Barron, *And Now I see: A Theology of Transformation* (New York: The Crossroad Publishing Company, 1998).
- Walter Brueggemann, *The Prophetic Imagination* (Minneapolis, MN: Fortress Press, 2018).
- Ignatius Brady, "History of Mental Prayer" *Greyfriars Review* Vol. 19 No. 3, 207-236
- Fidelis Aizpurúa, "Following Francis: A Catechism of Franciscan Spirituality," *Greyfriars Review* Vol. 17 Supplement, 2003, 75-103.
- Margaret Carney, *Light of Assisi, the Story of Saint Clare* (Cincinnati, OH: Franciscan Media, 2021).

Other potential reading sources:

- Susan Cain, *Quiet: The Power of Introverts in a World that Can't Stop Talking* (New York: Random House, 2015),

Responsibilities of a Friar in Presbyteral Formation

Ordination to the presbyterate is first and foremost a calling from God and the community to minister in the Church. This call needs to be mutually discerned by the friar in formation and the formation staff. A formal process to begin presbyteral formation includes a written letter to the Provincial Minister endorsed by the Director of Priestly Formation that states the friar's request to begin studies and how the friar views his call to priesthood in light of his call to Capuchin life. This request is ordinarily made at the end of the Year of Integration; however, it can be also made by friars in formation or solemnly professed at a later time. *It is not guaranteed that acceptance to studies/presbyteral formation means the friar will be ordained to the clerical state.* He must demonstrate his call to the clerical state that is informed and guided not only by his studies, but also the human, spiritual, and pastoral dimensions. Completing a degree or program of study in theology is not the only determination of one's preparation for priesthood.

Ordinarily, the Province of St. Mary defers to the Program of Priestly Formation (PPF) - revised 6th edition - for the requirements expected of candidates to be ordained. Although religious institutes are not strictly *bound* to the statutes of the PPF, great consideration of its wisdom should be ordinarily applied. Some exceptions may be made in conversation with the Director of Priestly Formation and/or the PDIF.

It is the responsibility of the friar engaged in the formation process for ordained ministry

- to have a spiritual director.
- to make an annual retreat.
- to pursue a life of personal and community prayer, recognizing his responsibility to the Liturgy of the Hours and to have recourse to whatever other means are appropriate to the development of this vocation.

The duties and tasks that guide presbyteral formation are:

1. Celebrates liturgy and sacraments.
2. Provides pastoral care and spiritual guidance.
3. Teaches the faith.
4. Leads pastoral administration.
5. Practices a ministry of presence with parish groups.
6. Participates in the life of the diocesan church.
7. Engages with diverse publics.
8. Engages in professional development.
9. Engages in personal development.

See Appendix L: Duties and Tasks of the Priest: A Pastoral Assessment for detailed duties and tasks within each area. Friars are asked to fulfill proficiency in a preponderance of these skills and duties.

Responsibilities of the Director of Post-Novitiate and Ministry Formation

In accordance with the norms laid down by the Church and our Constitutions (39:1), Director of Post-Novitiate and Ministry Formation oversee discernment of vocation, general pursuit of academic, spiritual and apostolic formation, ministry and CPE experiences, and preparations for ordination, working in collaboration with the individual friar and the Provincial Minister and Council. It is the responsibility of the Director of Post-Novitiate and Ministry Formation to maintain a good working relationship with the various institutions in which the friars are pursuing formation for ordained ministry, and to represent the Province at occasions calling for institutional representation by the Province.

Institution in Ministries of Lector and Acolyte

It is the prerogative of the Provincial Minister to institute candidates for ordained ministry in the ministries of lector and acolyte (cf. CIC 1035). This ministry has been approved for all brothers regardless of ordination candidacy. A record of the installation in the respective ministries is to be kept at the provincialate.

Approval for diaconal and presbyteral ordination

At the conclusion of theological studies (or at a time determined by the Director of Priestly Formation and the Provincial Minister), the director assists the candidate in determining his readiness for ordination. To determine this, the director should conduct the following process to provide feedback and guidance to the candidate.

The candidate will be expected to engage in mock confessions and pastoral scenario role plays with the director. The director is to ensure that the candidate is sufficiently prepared to engage pastorally in accordance with the teachings of the Roman Catholic Church.

It is the prerogative of the Provincial Minister and Council to grant approval for diaconal and presbyteral ordination (*Constitution* 39:3). Each of these is done by way of written request by the friar and written response by the Provincial Minister and Council, following the canonical requirements concerning preliminary inquiry and gathering of documentation.

The following are guidelines to evaluate readiness for diaconate ministry.

1. Is this person's disposition, personality, and demeanor compatible with and conformable to Ordained Ministry?
2. Does he exhibit priestly qualities and characteristics such as reverence for the sacred, awareness of the importance of confidentiality in spiritual direction and in the seal of confession, sensitivity for liturgical dynamics and style, awareness of the ecclesial dimensions of the Sacraments, respect for the diversity of the Ecclesial Body (the People of God) and the ability to adapt to diverse ministerial and liturgical situations?
3. Does he have the ability to offer spiritual insight, theological understanding and to awaken in others a desire for the Holy?
4. Is he aware of the expectations of the institutional Church in regards to ordained ministry as well as the expectations of God's people?
5. Can he represent authority in a careful way, implement Church law pastorally, and fulfill administrative duties in a timely manner?
6. Does he understand and see himself as a public person and the responsibilities that such a position demands?
7. Is he willing to be generally available for the People of God in a healthy and accommodating way?
8. Is he capable of being present to and available to the physically, mentally, and emotionally ill with patience and understanding?

Candidate's Letter Requesting Ordination

Upon completing the process for readiness for ordination, the candidate writes a letter to the Provincial Minister asking to be admitted to the Order of Presbyterate. This process involves stating that the candidate has adequately fulfilled the requirements of the Program for Priestly Formation (PPF). He should include a brief description of his understanding of his call to the presbyterate in the light/context of his call to be a Capuchin Lesser Brother.

Deacon Boards

Upon approval and before ordination to the diaconate, the candidate in consultation with the pastor will assemble a deacon board with at least four members from the parish. This committee may include the following people: Pastor, Parochial Vicar, Director of Religious Education, Parish Council member, parishioner at large, representative in their late teens/young adult.

This board should meet 2-3 times during the ministerial placement and should attend to the following areas: 1) Preaching, 2) Pastoral leadership (animating community, coordinating activities, spiritual sensitivity to spectrum of religious experiences of parish, responsible and timely), 3) Engaging socially (welcoming, inviting, & available). The deacon is expected to attend these meetings; however, members of the deacon board may request meetings with the pastor or the deacon alone to address certain areas in need.

The final meeting of the deacon board, facilitated by the director of priestly formation meets for the first part without the deacon present to discuss their encounter of the deacon's progress with the director of priestly formation. At the end of this portion, the lay members of the board should state/make known whether they recommend on behalf of the People of God for this friar to be admitted to the Order of Presbyterate. The Deacon will be invited to be present for the second part to hear their direct feedback.

Degree and Certificate Requirements

All degree or certificate requirements of the respective school or institution are to be met prior to ordination. Ordinarily, the friar should complete his course of studies before being ordained to the diaconate. In consultation with his director and the PDIF, a friar in solemn vows may request to be ordained to the diaconate during his 4th year of theology. His request will be determined on a case-by-case basis; however, he should not assume approval. A diaconate year in a fraternity away from formation may be an invaluable experience for a friar to grow in his understanding of Capuchin priesthood.

Recommendation from the Director of Priestly Formation

The director of priestly formation is ordinarily responsible for both recommendations to the diaconate and presbyterate.

The recommendation to the diaconate should be more extensive by nature of the candidate's admission to the clerical state. It should include the director's findings from all four dimensions of the PPF (human, intellectual, spiritual, and pastoral). It should also entail the director's findings from his mock confessions/pastoral role-playing exercises conducted with the candidate. See Appendix O: Procedure for Admission to the Priesthood in the Province of St Mary of the Capuchin Order.

Canonical Requirement

Upon approval to ordination, the Director of Priestly Formation should assist the candidate in completing the following canonical requirements for both ordinations to the diaconate and to the priesthood:

- Profession of Faith.
- Oath of Fidelity.
- 5-day retreat.
- Dimissorial Letter.

POSM Safe Environment Policy

All friars in formation must adhere to the Province of St Mary Safe Environment Policy including the required continuing education training in safe environment, following the state mandatory reporting requirements, and diocesan guidelines set by the diocese in which the friar is living and ministering.

POSM Formation Social Media Policy

Each friar in the Province of St. Mary is expected to adhere to the guidelines set by the Communications Director regarding proper and responsible social media use.

Friars in formation have the privilege of sharing their experience of formation through means of modern communication. This opportunity to represent the Capuchin Friars of the Province of St. Mary comes with tremendous responsibility and should therefore be undertaken with great discretion. Since the brothers in initial formation are not yet full members of the Province, their social media usage will be monitored by those responsible for their formation. Those responsible for formation and the friars in formation should be in dialogue and conversation as to what is both shared and consumed on social media. Each friar in initial formation is thus subject to the discretion of the Provincial Minister (PM), Provincial Delegate for Initial Formation (PDIF), and/or his individual formator as to the appropriateness of posts that may be unbecoming of members of the Province of St. Mary. Friars in initial formation will be expected to promptly remove any post, interview, blog, etc. requested by the PM, PDIF, or formator. If it at any time it is discovered that a friar in formation has a social media account under an alias, this could result in dismissal from the formation program.

Appendix A

Evaluation Process: Postulancy

Postulancy Evaluation Process

Formal Evaluations during Postulancy happen twice during the year. The first, Midyear evaluation is before the Christmas Break. The second, Final evaluation happens before the end of the time of Postulancy as decided by the formation team and the Provincial Directors of Initial Formation of the collaborating provinces.

There are Four parts to the Midyear evaluation process.

1. The postulant will write up a personal evaluation using the tool provided by the formation team. While each question need not be answered, the postulant is encouraged to choose some from each section and answer them, showing personal discernment for noting his own strengths and growing edges. The answers should involve more than answering yes or no, being about a paragraph in length. The length of the whole personal evaluation will be **1,000-1,500 words (mid-year)**. The evaluation will be turned in to the Formators on a date set for it, giving the Formators time to assess and assemble their evaluation.
2. The postulant will meet one-on-one with each of his classmates to do a peer evaluation. The format for this is giving at least 2 Affirmations or Compliments and 1 or 2 Challenges, noting growing edges in their peer. This is not a chance to “air grievances” but is meant to act as a time for the postulants to show discernment and care for the well-being and growth of their brothers in Capuchin life. The tool mentioned above can be used for this as well. Each postulant will give a written evaluation to each peer, as well as a copy to the Formators. These evaluations will be part of the Midyear evaluation. The postulant should keep the evaluation given them for their own use.
3. The postulant will meet one-on-one with each member of the permanently professed community for an evaluation as well. The postulant will not evaluate them, but will receive from them an evaluation in the same form as above: at least 2 Affirmations and at least 1 Challenge. The postulant will keep a copy of the evaluation and the professed friar will give a copy to the Formators to be used as part of the Midyear Evaluation.
4. The Formators, receiving copies of all the evaluations, will collate the information and present a formal evaluation to the postulant. After the reading the evaluation, it will be discussed and then signed by the postulant and the Formators. Signing the evaluation is not necessarily assent to the evaluation but acknowledgement of having received and read it. The postulant may write out an addendum to contest any of the points made and it will be attached to the evaluation. The postulant will keep one signed copy of the evaluation, one copy will go in their file, and copies will also go to their Provincial and their Provincial Director of Initial Formation.

End of Year Evaluation

The end of the year evaluation will follow the same format as the Midyear evaluation with some minor changes and one added part.

On top of the four parts above, the postulant's Ministry Supervisor will also write up an evaluation of the man. Then the Supervisor and Postulant will meet to discuss it, possibly with one of the Formators present as decided by the Formator in charge of ministry. The Supervisor will give a copy to the Formation team and this evaluation will be part of the Final Evaluation.

The end of the year personal evaluation should be longer and more involved than the midyear. **1,000-1,500 words (mid-year) and 1,500 - 2,000 (end of year).**

The final evaluation should offer concrete examples so that the PDIFs, who don't have regular access to the postulants, can have a better sense of what is happening.

Again, this evaluation will be signed as above and placed in the postulant's file.

Appendix B

Mid-Year & End of Year Evaluation: Postulancy

The Objectives of Postulancy from the *Ratio Formationis* are:

1. To help the postulant acquire the necessary self-knowledge and autonomy to enable him to integrate in a mature way his own history and personal reality, with all its lights and shadows.
2. To deepen his relationship with Jesus Christ, contemplating his attitude of love for life, his goodness, mercy, and compassion.
3. To awaken interest in social issues relating to injustice, violence, poverty and the violation of human rights.

In light of this, please respond to the following questions in a reflective manner. You do not need to answer all the questions. Answer the most important and pertinent. 1,000-1,500 words (mid-year) and 1,500 - 2,000 (end of year).

The Spiritual Dimension:

Blessed is that religious who takes no pleasure and delight except in the most holy words and deeds of the Lord (Admonition 20, 1).

The 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, 30,3*).

At the beginning of the year, you shared your spiritual autobiography and your call to Capuchin life. How has your awareness and sense of Call/Vocation deepened over the last few months? How do you articulate it now?

How has your appreciation and practice of the sacraments of the Eucharist and Reconciliation grown? How do you understand Communion? How do you understand God's love, mercy, and forgiveness?

How has your appreciation of fraternal prayer grown? Liturgy of the hours? Other communal prayer experiences? How have you grown in personal prayer? Contemplation? Devotional practices? Spiritual Reading? Where have you found struggles and/or blessings with personal or fraternal prayer? Have you found a balance and way to integrate the two?

The Human Dimension:

What a person is before God, that he is, and no more (Admonition 19, 2).

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. (Constitutions, 30,2)

How have you developed in affective maturity? i.e: How have you integrated, learned from, and grown from your emotions? What practices assist you in feeling and expressing your full range of emotions with God? With others? Are there emotions you do not express well or at all? Which emotions do you express freely?

How would you rate your self-esteem? How do you practice physical, psychological, and spiritual self-care? How do you practice self-reflection and self-disclosure? With whom? (friends, family, spiritual director, therapist, formators, medical professionals, etc.)

Have you maintained friendships outside of the community? What is the quality of your relationships with those outside of your political, theological, ecclesial, economic, and cultural in-groups? How would others assess the mutuality of these relationships? Do you listen to feedback from others?

How do you demonstrate resiliency? i.e. the capacity to accept, learn and grow from failure, criticism, etc.? How do you respond when things are not going your way? Are you able to talk and work through difficult situations and relationships? What does commitment look like for you? Do you have the capacity to grow in commitment?

What is your relationship to technology and media? How do you use media and technology “poorly?” What struggles have you had in disengaging and/or reevaluating your relationship to them? How are you preparing for the greater media fast of Novitiate?

The Intellectual Dimension:

Where there is charity and wisdom, there is neither fear nor ignorance (Admonition 27,1).

Let the brothers, according to each one’s gift and grace, apply themselves to a more profound study of sacred scripture, spiritual theology, liturgy, and the history and spirituality of the Order; let them also exercise forms of the apostolate as well as domestic work. (Constitutions, 30)

How has your appreciation and understanding of the depth and breadth of Catholic thought and teaching grown this year? (Catechism, Prayer, Spirituality, etc...) What are a few examples of this?

How has your knowledge of the person of Jesus developed in light of your reading of scripture this year?

How has your understanding of the historical persons of St. Francis and St. Clare developed this past year? Which presentation (book, movie, etc...) has been most impactful in this area? Why?

What is your practice of spiritual reading? What has sparked your intellectual curiosity? What would you like to explore in the future?

The Missionary-Pastoral Dimension:

Let them not engage in arguments or disputes, but be subject to every human creature for God's sake, and let them proclaim that they are Christians. (Earlier Rule, 16).

The first apostolate of a lesser brother is to live the gospel life in the world in truth, simplicity, and joy. Since the life of brotherhood is a particular sharing in Christ's mission, we strive to improve its apostolic effectiveness by our close and ardent dedication to the Lord Jesus, making our fraternal relationships ever more authentic, and being generously involved in the mission of the Order. (Constitutions, 147)

How have ministry/theological reflection and community Review of Life expanded or deepened your practice of ministry? What has been most formational for your sense of being a minister? (Reflection, Supervisors, Co-workers, Those coming for services, etc...)

How has apostolic work and service to the poor helped to form your Capuchin identity? How has it informed your relationship with Christ and the Church? How has your Heart for the Poor and disenfranchised grown this year? How do sympathy, empathy, and compassion factor into this for you? What particular struggles of others do you empathize with the most? Why?

How are ministry and prayer helping you in reading the "Signs of the Times?" Which larger social issues have been brought to your attention in your ministry and coursework, maybe for the first time? Which issues would you like to work on more in the future?

The Charismatic Dimension:

Let us refer all good to the Lord, God Almighty and Most High, acknowledge that every good is His, and thank Him from whom all good comes (Earlier Rule 17, 17).

Holding fast to the gospel insights of Saint Francis and to the tradition of the Order, we undertake as our specific responsibility to follow the poverty

of our Lord Jesus Christ in simplicity of life and joyful austerity, in hard work, trust in Providence, and in charity towards all. (Constitutions, 61)

How have you cultivated silence and beauty in your life? What fills you with wonder and awe? (Nature, Art, Music, Prayer, etc...)

How have the values of Fraternity, Minority, and Brotherhood grown and/or deepened in you this year? How do they inform your sense of Call/Vocation and identity? How do they inform your relationships both in and out of community?

How do you express stewardship and initiative as a Minor Brother in Community? How do you take responsibility in community? How do you express dependability and trustworthiness? Do you share responsibility in communal situations or do you wait for some authority figure to fix it?

How do you relate to those entrusted with authority in the community? How have you demonstrated obedience without being overly deferential? How have you been able to give the benefit of the doubt to authority without presuming its intentions to be invasive, controlling, and oppressive? How are you able to love your brothers and treat them equally without regard to title or status?

What particular aspects and values of St. Francis do you embody best? Which of his aspects and values are Jesus, the Order, and the Church asking you to develop more fully?

Novitiate Checklist

The following are criteria to assess readiness for the novitiate. Please rate yourself from 1-10 in the following areas.

- _____ Mental equilibrium;
- _____ Physical equilibrium;
- _____ Capacity for initiative and co-responsibility;
- _____ Right use of freedom and of time;
- _____ Willingness for service and for work;
- _____ Capacity for responsible, free choices;
- _____ Knowledge and practice of Christian life;
- _____ Sufficient clarity with regard to motivations;
- _____ Openness to formation accompaniment;
- _____ Aptitude for community life;
- _____ Readiness to follow Christ in poverty, obedience, and chastity;
- _____ Belongingness;
- _____ Joy in your life as a Capuchin postulant.



Appendix C Supervisor Ministry Evaluation Postulancy

Postulant's name: _____ Supervisor: _____

Ministry Site: _____ Date: _____

*Dear Supervisor: Thank you for taking the time to fill this out. Brief handwritten answers are fine. You can also use the Google form linked in the email. Your input is critical in facilitating the growth of our brother. We are grateful for your time and efforts in mentoring our brother in Formation with us. Your honest and candid comments will greatly enhance our brother's ability to minister effectively and serve those in most need in the future. Overly positive feedback is less helpful for their growth. Please return this form to Director Name @ [Director email](#) or mail to 1927 N Vel R. Phillips Ave, Milwaukee, WI 53212 by **DATE DUE**. **Thank you!***

Please list three adjectives that best describe the postulant.

Please indicate the score between 1-5 that best reflects the friar's performance in the area identified in the following areas. **1 = Deficient, 5 = Exceptional Ability or N/A**

PASTORAL DEVELOPMENT

- | | |
|--|--|
| _____ Leadership Ability | _____ Sensitivity & Appreciation of Other Cultures |
| _____ Ability to Collaborate | _____ Reflects compassion and care |
| _____ Acquires New Skills for Ministry | _____ Reflects vocational joy & peace |
| _____ Contributes to Your Organization's Mission & Goals | _____ Responsible |
| _____ Developed Pastoral Identity | _____ Takes Initiative |
| _____ Models a Living Witness of the Gospel | _____ Invests himself in tasks |
| | _____ Punctual |

Pastoral Development Comments:

HUMAN DEVELOPMENT

_____ Maturity & Self-confidence
_____ Demonstrates Conversational Skills
_____ Demonstrates Listening Skills
_____ Demonstrates Ability for Self-Reflection
_____ Relates Well to Others
_____ Maintains Proper Boundaries
_____ Copes with Tensions & Ambiguities

_____ Friendly & Approachable
_____ Open to Mentoring
_____ Ability to Make Decisions
_____ Ability to Express Feelings
_____ Acceptance of Critical Feedback
_____ Ability to Offer Critical Feedback
_____ Punctuality
_____ Sense of Humor
_____ Creativity

Human Development Comments:

Please write a response to the following three questions in light of the information noted. Feel free to include any other thoughts.

- 1. In what ways did the postulant assist in the mission of your organization?**

- 2. Please summarize the postulant's ministerial strengths.**

Friars are expected to be able to serve diverse populations and needs in various ministerial organizations. What areas do you see this postulant needing to expand or improve his ministerial skills? Can you suggest a ministry setting that would be helpful for his development

Appendix D

Reading List for Franciscan Topics During Post-Novitiate

Documents for monthly discussions with Formation Staff &/or other friars:

On-going formation in Franciscan spirituality is an essential part of Post-Novitiate formation. Below are some possible books and resources.

- Julien Green, *God's Fool: The Life and Times of Francis of Assisi*, trans. Peter Heinegg (San Francisco: Harper & Row Publishers, 1983)
- *Defragmenting Franciscanism: Collaboration in a Post Itē Vos Era*, ed. Edward Foley, OFM Cap. (Chicago, Paul Bechtold Library Publications, 2019), Excerpts
- Optatus Van Asseldonk, "Francis of Assisi, Imitator of Christ Crucified, God and Man, in the Franciscan and Capuchin Tradition" *Greyfriars Review* Vol. 17, No.2, 217-246.
- Ignatius Brady, "Saint Francis and the Holy Spirit" *Greyfriars Review* Vol. 19, No.3, 199-205.
- Constitutions of the Capuchin Friars Minor
 - Study Aids for the Constitutions: <https://www.ofmcap.org/en/documenti-ofmcap/study-aids-for-the-constitutions>
- Ignatius Brady, "History of Mental Prayer" *Greyfriars Review* Vol. 19 No. 3, 207-236
- Fidelis Aizpurúa, "Following Francis: A Catechism of Franciscan Spirituality," *Greyfriars Review* Vol. 17 Supplement, 2003, 75-103.
- Margaret Carney, *Light of Assisi, the Story of Saint Clare* (Cincinnati, OH: Franciscan Media, 2021).
- Capdox: <https://www.capdox.capuchin.org.au/>
 - Formation: <https://www.capdox.capuchin.org.au/formation/>
 - Franciscan topics: <https://www.capdox.capuchin.org.au/francescana/>

Appendix E
Mid-Year Post-Novitiate Evaluation
YEAR OF INTEGRATION EDITION

The evaluation process is a tool of discernment to be used by you and the formation staff to examine and reflect on the core values of our Capuchin Franciscan life and how we are living it. The purpose is to raise questions and discover areas of growth for your formation, to provide you with fraternal feedback on how you are perceived by your peers and staff, and how that perception relates to your own.

There are three elements to the process:

- 1) The self-evaluation: You are asked to reflect on the following questions.
- 2) feedback: Select one of your brothers in either Boston community (excluding any member of the formation council) to discuss honestly and fraternally their experience of you. Please make time for a serious, fraternal conversation.
- 3) Staff evaluation: The formation staff receives the evaluation, discusses your sense of discernment, and writes their own evaluation. That evaluation will be given to you for your review and will then be discussed with you in your monthly formation meeting.

This is an opportunity to articulate your call to Capuchin life with more specificity. When preparing the self-evaluation, you should consider two aspects of our Capuchin life: first, your understanding of the values as it is presented in the Rule of St. Francis and our Capuchin Constitutions. Second, how you are living out each of these values in your daily life.

An equally important part of the reflection would be to pinpoint those areas of concern or struggle with one or more of the values, such as your relationships with the brothers in fraternity, or an aspect of your ministry that has caused you frustration or confusion.

Use the daily routines of our life: common prayer, private prayer, meals, studies, fraternity, ministry, interaction with staff, etc. It is in these simple and un-heroic moments that we live out our Capuchin charism. Above all, be honest with yourself – according to St. Theresa of Avila, self-knowledge is one of the basic keys to a life lived in Christ. An honest, charitable and fraternal reflection will help us all have an even better fraternity, Province, and Church.

Please E-mail or print your completed evaluation by _____.

Fraternally,
The Formation Staff

Guidelines for Self-Evaluation

As you reflect on our Rule and Constitutions, evaluate yourself on your ability to discern God's call and the love with which you respond in Capuchin life. Use the following questions to assess how you are growing (or not) in our Capuchin way of life. Give specific examples of growth and places where you need development. The evaluation is in two parts: short answer and ranking on a scale of 1-10. For Part I, the short answer section, please answer every question with at least 3 or 4 sentences. It does not have to be a long narrative. In Part II, simply assess yourself on the scale of 1-10. Give an explanation if you think it is helpful.

*Transition Experience:

What has been your experience of Capuchin life been like since your first profession of vows? What is going well? What needs to be addressed in the proceeding time of integration to prepare you for studies/ministerial preparation?

I. The spiritual dimension:

Blessed is that religious who takes no pleasure and delight except in the most holy words and deeds of the Lord (Admonition 20, 1).
--

The post-novitiate is the period in which the brothers, progressing further in maturity, prepare themselves for the definitive choice of our gospel life that is undertaken through perpetual profession. (Constitutions, 30). We, therefore, exhort the brothers to prepare themselves for profession with great care, by spiritual exercises, by an intense sacramental life, especially one that is Eucharistic, and by fervent prayer. Let this be done more intensely and in a special way before perpetual profession. (Constitutions, 31).

1.1 How has your understanding of God's call developed since you arrived at the Post novitiate house? In what ways do you see your life as consecrated to God?

1.2 How has the activity of the Spirit in prayer and the Word impacted your behavior, attitudes, and choices over the past several months?

1.3 How do you keep action and contemplation in a healthy tension in your life? Which one dominates? How do you see God calling you to balance and integrate both contemplation and action?

II. The human dimension:

What a person is before God, that he is, and no more (Admonition 19, 2).

Following the teaching of Saint Francis, in a spirit of minority, let us trustingly make known to one another our every need, recognizing our mutual dependence as an essential component of brotherly communion and a source of mutual support. We practice solidarity, a preeminent expression of brotherly love, and resolutely commit ourselves to the good of each and every person, because we are all responsible for one another. (Constitutions, 72)

Affective maturity refers to maturity of affection in which our affections and desires find their fulfillment in Christ. Affective maturity is our emotional and subjectively experienced feelings as a mature adult. This means that we are not controlled by our emotions, but that we are aware of them, learn from them, and integrate them in our relations with others and with the world. (Click [Here](#) for document from Institute for Priestly Formation)

2.1 Using the above definition, what are some indications that you are growing in affective maturity? Can you relate to a wide range of people (men and women, young and old, rich and poor, traditional and progressive) while affirming your own values and commitments?

2.2 On a scale of 1 to 10 (1 being fiercely individual, 5 being well-balanced, and 10 being radically dependent on others), how would you rate yourself as a friar? Please explain your choice.

2.3 How would you assess the quality of your spiritual direction? In the internal forum, are you able to be candid and honest? If not, why? Are you able to take risks and talk about important and sensitive issues? If not, why? (Please note: Out of respect for the internal forum, the answer you requires no further explanation unless you'd like to generally share more since this evaluation is in the external forum).

2.4 How are your social and emotional needs being met? How do you communicate your needs to your brothers and respond to their needs?

2.5 It is important to make your material needs known in fraternity without entitlement. How is this reflected in your life?

III. The intellectual dimension:

Where there is charity and wisdom, there is neither fear nor ignorance (Am 27,1).

Let the brothers, according to each one's gift and grace, apply themselves to a more profound study of sacred scripture, spiritual theology, liturgy, and the history and spirituality of the Order; let them also exercise forms of the apostolate as well as domestic work. (Constitutions, 30)

3.1 How do you reflect critically and openly according to the Gospel while engaging with the signs of the times?

3.2 Give examples of how you are a good steward of the opportunity to study given by our benefactors. Are you able to utilize what you are learning in the assigned readings, discussions with formators and presenters, prayer, ministry, and fraternal life? Give examples.

3.3 How do the Franciscan documents of the Rule, Constitutions, and history of the Order influence your understanding of Capuchin life in our Province? How are they a source of prayer and reflection for you? Are there any new insights that you have encountered in your prayer/study?

IV. The missionary-pastoral dimension:

Let them not engage in arguments or disputes, but be subject to every human creature for God's sake, and let them proclaim that they are Christians. (Earlier Rule, 16).

The first apostolate of a lesser brother is to live the gospel life in the world in truth, simplicity, and joy. Since the life of brotherhood is a particular sharing in Christ's mission, we strive to improve its apostolic effectiveness by our close and ardent dedication to the Lord Jesus, making our fraternal relationships ever more authentic, and being generously involved in the mission of the Order. (Constitutions, 147)

4.1 How does your ministry impact your personal, communal, and prayer life?

4.2 How is your understanding of your assigned ministry consistent with the Order and Church? In what ways does your ministry reflect our life? Do you think your ministry should be considered for future friars?

4.3 Give examples of ministerial skills acquired since your last evaluation that will enhance your ministry?

4.4 How does the Franciscan vision of minority influence your approach to and style of ministry?

V. The charismatic dimension:

Let us refer all good to the Lord, God Almighty and Most High, acknowledge that every good is His, and thank Him from whom all good comes (Earlier Rule 17, 17).

Holding fast to the gospel insights of Saint Francis and to the tradition of the Order, we undertake as our specific responsibility to follow the poverty of our Lord Jesus Christ in simplicity of life and joyful austerity, in hard work, trust in Providence, and in charity towards

all. Poverty, chosen in order to follow Christ, qualifies us to share in His relationship to the Father as a son, as a brother, and as a servant in the midst of people. In doing so, poverty leads us to live in solidarity with the little ones of this world. (Constitutions, 61)

5.1 What challenges or obstacles have tested your resolve to follow Christ as a Franciscan friar? Have these challenges or obstacles strengthened or weakened your commitment?

5.2 What has been the most profound experience that helped shape your Capuchin identity since your last evaluation? What parts of our Capuchin charism are most active in your life? What part of our charism needs further reflection and development?

5.3 Where do you see examples of the Paschal Mystery, (life, death, and resurrection) in everyday life? What practical ways have you responded to this new or renewed awareness?

PART II.

The Province uses the below criteria to determine readiness for solemn profession. This process is meant as a tool for self-reflection *now*. Your self-identified number also provides the formation staff an indication how *you* identify yourself and where you are at in your vocational journey. Please be as candid as possible. Rank yourself from 1 to 10 (1 being the least) in the following areas:

_____ Your capacity *today* to make a final commitment and to live the evangelical counsels

_____ The necessary affective maturity to live Capuchin life for the rest of your life

_____ A personal relationship with God and a mature life of prayer

_____ The ability to take personal initiative and responsibility for your religious life

_____ The ability to live and work in brotherhood peaceably and in humility and gratitude

_____ The capacity to consistently and joyfully give service to others, especially the poorest

_____ An adequately developed sense of justice, peace and respect for creation

_____ Sufficient interior freedom and love of poverty

_____ Your sense of belonging to the brotherhood, the Order and the Church

_____ Your ability to properly and appropriately use social media and new technologies

_____ Effective and creative use of time

If there is anything you would like to expand upon from these criteria, please do. Please also think about goals for the coming semester in light of your evaluation.

Appendix F

Mid-Year Post-Novitiate Evaluations

The evaluation process is a tool of discernment to be used by you and the formation staff to examine and reflect on the core values of our Capuchin Franciscan life and how we are living it. The purpose is to raise questions and discover areas of growth for your formation, to provide you with fraternal feedback on how you are perceived by your peers and staff, and how that perception relates to your own.

There are three elements to the process:

- 1) The self-evaluation: You are asked to reflect on the following questions.
- 2) Peer feedback: Select two of your peers to respond honestly and fraternally to their experience of you. Select two friars one of which must be from San Lorenzo Friary. (You may choose one from St. Francis Friary if you wish.) Please make time for a serious, fraternal conversation. Please write a ½ page summary of the conversation. Give it to the Post-novitiate directors and the friar with whom you spoke.
- 3) Staff evaluation: The formation staff receives the evaluation, discusses your sense of discernment, and writes their own evaluation. That evaluation will be given to you for your review and will then be discussed with you in your monthly formation meeting.

This is an opportunity to articulate your call to Capuchin life with more specificity. When preparing the self-evaluation, you should consider two aspects of our Capuchin life: first, your understanding of the values as it is presented in the Rule of St. Francis and our Capuchin Constitutions. Second, how you are living out each of these values in your daily life.

An equally important part of the reflection would be to pinpoint those areas of concern or struggle with one or more of the values, such as your relationships with the brothers in fraternity, or an aspect of your ministry that has caused you frustration or confusion.

Use the daily routines of our life: common prayer, private prayer, meals, studies, fraternity, ministry, interaction with staff, etc. It is in these simple and un-heroic moments that we live out our Capuchin charism. Above all, be honest with yourself – according to St. Theresa of Avila, self-knowledge is one of the basic keys to a life lived in Christ. An honest, charitable and fraternal reflection will help us all have an even better fraternity, Province, and Church.

Fraternally,

Guidelines for Self-Evaluation

As you reflect on our Rule and Constitutions, evaluate yourself on your ability to discern God's call and the love with which you respond in Capuchin life. Use the following questions to assess how you are growing (or not) in our Capuchin way of life. Give specific examples of growth and places where you need development. The evaluation is in two parts: short answer and ranking on a scale of 1-10. For Part I, the short answer section, please answer every question with at least 3 or 4 sentences. It does not have to be a long narrative. In Part II, simply assess yourself on the scale of 1-10. Give an explanation if you think it is helpful.

I. The spiritual dimension:

Blessed is that religious who takes no pleasure and delight except in the most holy words and deeds of the Lord (Admonition 20, 1).

The post-novitiate is the period in which the brothers, progressing further in maturity, prepare themselves for the definitive choice of our gospel life that is undertaken through perpetual profession. (Constitutions, 30). We, therefore, exhort the brothers to prepare themselves for profession with great care, by spiritual exercises, by an intense sacramental life, especially one that is Eucharistic, and by fervent prayer. Let this be done more intensely and in a special way before perpetual profession. (Constitutions, 31).

1.1 How has your understanding of God's call developed since your last evaluation? In what ways do you see your life as consecrated to God?

1.2 How has the activity of the Spirit in prayer and the Word impacted your behavior, attitudes, and choices over the past several months?

1.3 How do you keep action and contemplation in a healthy tension in your life? Which one dominates? How do you see God calling you to balance and integrate both contemplation and action?

II. The human dimension:

What a person is before God, that he is, and no more (Admonition 19, 2).

Following the teaching of Saint Francis, in a spirit of minority, let us trustingly make known to one another our every need, recognizing our mutual dependence as an essential component of brotherly communion and a source of mutual support. We practice solidarity, a preeminent expression of brotherly love, and resolutely commit ourselves to the good of each and every person, because we are all responsible for one another. (Constitutions, 72)

Affective maturity refers to maturity of affection in which our affections and desires find their fulfillment in Christ. Affective maturity is our emotional and subjectively experienced feelings as a mature adult. This means that we are not controlled by our emotions, but that

we are aware of them, learn from them, and integrate them in our relations with others and with the world. (Click [Here](#) for document from Institute for Priestly Formation)

2.1 Using the above definition, what are some indications that you are growing in affective maturity? Can I relate to a wide range of people (men and women, young and old, rich and poor, traditional and progressive) in a warm, human way?

2.2 On a scale of 1 to 10 (1 being fiercely individual, 5 being well balanced, and being 10 being radically dependent) how would you rate yourself as a friar? Please explain your choice.

2.3 How would you assess the quality of your spiritual direction? Are you able to be candid and honest? Are you able to take risks and talk about important and sensitive issues?

2.4 How are your social and emotional needs being met? How do you communicate your needs to your brothers and respond to their needs?

2.5 It is important to make your material needs known in fraternity without entitlement. How is this reflected in your life?

III. The intellectual dimension:

Where there is charity and wisdom, there is neither fear nor ignorance (Am 27,1).

Let the brothers, according to each one's gift and grace, apply themselves to a more profound study of sacred scripture, spiritual theology, liturgy, and the history and spirituality of the Order; let them also exercise forms of the apostolate as well as domestic work. (Constitutions, 30)

3.1 How do you reflect critically and openly according to the Gospel while engaging with the signs of the times?

3.2 Give examples of how you are a good steward of the opportunity to study given by our benefactors. Are you able to utilize what you are learning in school, prayer, ministry and fraternal life? Give examples.

3.3 How do the Franciscan documents of the Rule, Constitutions, and history of the Order influence your understanding of Capuchin life in our Province? How are they a source of prayer and reflection for you? Are there any new insights that you have encountered in your prayer/study?

3.4 How do you balance the demands of academic study, ministries and commitments, and fraternal life? Do you tend to give priority to one over the other?

IV. The missionary-pastoral dimension:

Let them not engage in arguments or disputes, but be subject to every human creature for God's sake, and let them proclaim that they are Christians. (Earlier Rule, 16).

The first apostolate of a lesser brother is to live the gospel life in the world in truth, simplicity, and joy. Since the life of brotherhood is a particular sharing in Christ's mission, we strive to improve its apostolic effectiveness by our close and ardent dedication to the Lord Jesus, making our fraternal relationships ever more authentic, and being generously involved in the mission of the Order. (Constitutions, 147)

4.1 How does your ministry impact your personal, communal, and prayer life?

4.2 How is your understanding of your assigned ministry consistent with the Order and Church?

4.3 Give examples of ministerial skills acquired since your last evaluation that will enhance your ministry?

4.4 How does the Franciscan vision of minority influence your approach to and style of ministry? How do you exercise the spirit of minority in your fraternal life through your various chores and responsibilities to the local community?

V. The charismatic dimension:

Let us refer all good to the Lord, God Almighty and Most High, acknowledge that every good is His, and thank Him from whom all good comes (Earlier Rule 17, 17).

Holding fast to the gospel insights of Saint Francis and to the tradition of the Order, we undertake as our specific responsibility to follow the poverty of our Lord Jesus Christ in simplicity of life and joyful austerity, in hard work, trust in Providence, and in charity towards all. Poverty, chosen in order to follow Christ, qualifies us to share in His relationship to the Father as a son, as a brother, and as a servant in the midst of people. In doing so, poverty leads us to live in solidarity with the little ones of this world. (Constitutions, 61)

5.1 What challenges or obstacles have tested your resolve to follow Christ as a Franciscan friar? Have these challenges or obstacles strengthened or weakened your commitment?

5.2 What has been the most profound experience that helped shape your Capuchin identity since your last evaluation? What parts of our Capuchin charism are most active in your life? What part of our charism needs further reflection and development?

5.3 Where do you see examples of the Paschal Mystery, (life, death, and resurrection) in everyday life? What practical ways have you responded to this new or renewed awareness?

PART II.

The Province uses the below criteria to determine readiness for solemn profession. Rank yourself from 1 to 10 (1 being the least) in the following areas:

_____ Your capacity to make a final commitment and to live the evangelical counsels

_____ The necessary affective maturity to live Capuchin life for the rest of your life

_____ A personal relationship with God and a mature life of prayer

_____ The ability to take personal initiative and responsibility for your religious life

_____ The ability to live and work in brotherhood peaceably and in humility and gratitude

_____ The capacity to consistently and joyfully give service to others, especially the poorest

_____ An adequately developed sense of justice, peace and respect for creation

_____ Sufficient interior freedom and love of poverty

_____ Your sense of belonging to the brotherhood, the Order and the Church

_____ Your ability to properly and appropriately use social media and new technologies

_____ Effective and creative use of time

If there is anything you would like to expand upon from these criteria, please do. Please also think about goals for the coming semester in light of your evaluation.

Appendix G

Post-Novitiate Academic Year End Evaluation

The evaluation process is a tool of discernment to be used by you and the formation staff to examine and reflect on the core values of our Capuchin Franciscan life and how we are living it. The purpose is to raise questions and discover areas of growth for your formation, to provide you with fraternal feedback on how you are perceived by your peers and staff, and how that perception relates to your own.

There are three elements to the process:

- 1) The self-evaluation: You are asked to reflect on your experience of post-novitiate formation throughout the previous year with special attention to the time since your last evaluation.
- 2) feedback: Select one of your brothers in either Boston community (excluding any member of the formation council) to discuss honestly and fraternally their experience of you. Please make time for a serious, fraternal conversation.
- 3) Staff evaluation: The formation staff receives the evaluation, discusses your sense of discernment, and writes their own evaluation. That evaluation will be given to you for your review and will then be discussed with you in your monthly formation meeting.

This is an opportunity to articulate your call to Capuchin life with more specificity. When preparing the self-evaluation, you should consider two aspects of our Capuchin life: first, your understanding of the values as it is presented in the Rule of St. Francis and our Capuchin Constitutions. Second, how you are living out each of these values in your daily life.

An equally important part of the reflection would be to pinpoint those areas of concern or struggle with one or more of the values, such as your relationships with the brothers in fraternity, or an aspect of your ministry that has caused you frustration or confusion.

Use the daily routines of our life: common prayer, private prayer, meals, studies, fraternity, ministry, interaction with staff, etc. It is in these simple and un-heroic moments that we live out our Capuchin charism. Above all, be honest with yourself – according to St. Theresa of Avila, self-knowledge is one of the basic keys to a life lived in Christ. An honest, charitable and fraternal reflection will help us all have an even better fraternity, Province, and Church.

Please E-mail or print your completed evaluation by _____.

Fraternally,
The Formation Staff

Guidelines for Self-Evaluation

As you reflect on our Rule and Constitutions, evaluate yourself on your ability to discern God's call and the love with which you respond in Capuchin life. Using the five dimensions articulated in the *Ratio Formatio*, please provide a descriptive narrative that articulates your understanding of your vocation to the vows and Capuchin life that address the following considerations:

First, consider your midyear self-evaluation and your formator's evaluation to ascertain any immediate goals that needed to be addressed. Indicate *in your narrative* how you have implemented such goals.

Second, consider the goals you and your formator have established with long-term outcomes. How have these been reflected upon during the year.

Finally, consider the goals of the post-novitiate program, the vows and charism, and the values you seek to uphold as a friar. Give specific examples of growth and places where you need development.

At the conclusion of your evaluation please indicate your desire to renew your vows (required for those in temporary vows for 1-2 years). At the conclusion of your second year of post-novitiate, please indicate if you will be considering the discernment process for solemn profession during the following year. For those who are concluding their third year, please indicate your desire to renew vows and what steps you might like to take to discern the call to solemn vows.

Please be sure to include elements of **all 5 dimensions** (See below). The narrative should be in paragraph form with parenthetical citations where necessary. Although length often reflects effort, a short yet candid reflection is far more helpful than a long-drawn-out stream of conscious thoughts on paper. Ideally, the reflection should be 5-10 pages double spaced (1,000 - 2,000 words). If you have questions or concerns, please inform the formation staff sooner than later.

I. The spiritual dimension:

Blessed is that religious who takes no pleasure and delight except in the most holy words and deeds of the Lord (Admonition 20, 1).
--

The post-novitiate is the period in which the brothers, progressing further in maturity, prepare themselves for the definitive choice of our gospel life that is undertaken through perpetual profession. (Constitutions, 30). We, therefore, exhort the brothers to prepare themselves for profession with great care, by spiritual exercises, by an intense sacramental life, especially one that is Eucharistic, and by fervent prayer. Let this be done more intensely and in a special way before perpetual profession. (Constitutions, 31).

II. The human dimension:

What a person is before God, that he is, and no more (Admonition 19, 2).

Following the teaching of Saint Francis, in a spirit of minority, let us trustingly make known to one another our every need, recognizing our mutual dependence as an essential component of brotherly communion and a source of mutual support. We practice solidarity, a preeminent expression of brotherly love, and resolutely commit ourselves to the good of each and every person, because we are all responsible for one another. (Constitutions, 72)

Affective maturity refers to maturity of affection in which our affections and desires find their fulfillment in Christ. Affective maturity is our emotional and subjectively experienced feelings as a mature adult. This means that we are not controlled by our emotions, but that we are aware of them, learn from them, and integrate them in our relations with others and with the world. (Click [Here](#) for document from Institute for Priestly Formation)

III. The intellectual dimension:

Where there is charity and wisdom, there is neither fear nor ignorance (Am 27,1).

Let the brothers, according to each one's gift and grace, apply themselves to a more profound study of sacred scripture, spiritual theology, liturgy, and the history and spirituality of the Order; let them also exercise forms of the apostolate as well as domestic work. (Constitutions, 30)

IV. The missionary-pastoral dimension:

Let them not engage in arguments or disputes, but be subject to every human creature for God's sake, and let them proclaim that they are Christians. (Earlier Rule, 16).

The first apostolate of a lesser brother is to live the gospel life in the world in truth, simplicity, and joy. Since the life of brotherhood is a particular sharing in Christ's mission, we strive to improve its apostolic effectiveness by our close and ardent dedication to the Lord Jesus, making our fraternal relationships ever more authentic, and being generously involved in the mission of the Order. (Constitutions, 147)

V. The charismatic dimension:

Let us refer all good to the Lord, God Almighty and Most High, acknowledge that every good is His, and thank Him from whom all good comes (Earlier Rule 17, 17).

Holding fast to the gospel insights of Saint Francis and to the tradition of the Order, we undertake as our specific responsibility to follow the poverty of our Lord Jesus Christ in simplicity of life and joyful austerity, in hard work, trust in Providence, and in charity towards all. Poverty, chosen in order to follow Christ, qualifies us to share in His relationship to the Father as a son, as a brother, and as a servant in the midst of people. In doing so, poverty leads us to live in solidarity with the little ones of this world. (Constitutions, 61)

Appendix H Summer Evaluation

After spending time away from the designated house of formation, the formation staff asks for a brief reflection on your experience of your summer assignment. Please provide the following information (bullet points or paragraph form):

Friar:

Assignment:

Dates of assignment:

Residence:

Supervisor:

Attentiveness of supervisor:

Given Responsibilities during the Summer:

Your perception of the assignment:

Your perception of the fraternal life where you live:

A highlight of the summer:

A challenge from the summer:

Your recommendation for future post-novices at this summer assignment:

Checklist before beginning academic year:

Did you take vacation?

Did you take retreat?

Are there any major events or dates that need to be considered during this upcoming year?

Appendix I
Supervisor End-of-Year Ministry Evaluation

Friar's name: _____ Supervisor: _____
Ministry Site: _____ Date: _____

*Dear Supervisor: Thank you for taking the time to fill this out. Brief handwritten answers are fine. Please attach any extra comments you wish. All of your input is helpful. We are grateful for your time and efforts in mentoring our brother in Formation with us. Your commitment will greatly enhance our brother's ability to minister effectively and serve those in most need in the future. Please return this form to Director @ director_email@capuchin.org by **Date**.*

Thank you!

Instructions:

Please indicate the score between 1-5 that best reflects the friar's performance in the area identified in the following areas. **1 = Deficient, 5 = Exceptional Ability or N/A**

PASTORAL DEVELOPMENT

- | | |
|--|--|
| _____ Leadership Ability | _____ Sensitivity & Appreciation of Other Cultures |
| _____ Ability to Collaborate | _____ Reflects compassion and care |
| _____ Acquires New Skills for Ministry | _____ Reflects vocational joy & peace |
| _____ Contributes to Your Organization's Mission & Goals | _____ Responsible |
| _____ Developed Pastoral Identity | _____ Takes Initiative |
| _____ Models a Living Witness of the Gospel | _____ Invests himself in tasks |
| | _____ Punctual |

Pastoral Development Comments:

(please note areas of improvement or stagnation from mid-year)

HUMAN DEVELOPMENT

- | | |
|---|---|
| <input type="checkbox"/> Maturity & Self-confidence | <input type="checkbox"/> Friendly & Approachable |
| <input type="checkbox"/> Demonstrates Conversational Skills | <input type="checkbox"/> Open to Mentoring |
| <input type="checkbox"/> Demonstrates Listening Skills | <input type="checkbox"/> Ability to Make Decisions |
| <input type="checkbox"/> Demonstrates Ability for Self-Reflection | <input type="checkbox"/> Ability to Express Feelings |
| <input type="checkbox"/> Relates Well to Others | <input type="checkbox"/> Acceptance of Critical Feedback |
| <input type="checkbox"/> Maintains Proper Boundaries | <input type="checkbox"/> Ability to Offer Critical Feedback |
| <input type="checkbox"/> Copes with Tensions & Ambiguities | <input type="checkbox"/> Punctuality |
| | <input type="checkbox"/> Sense of Humor |
| | <input type="checkbox"/> Creativity |

Human Development Comments:
(please note areas of improvement or stagnation from mid-year)

Please write a response to the following three questions in light of the information noted. Feel free to include any other thoughts.

- 1. In what ways did the friar assist in the mission of your organization?**
- 2. Please summarize the friar's ministerial strengths.**
- 3. Friars are expected to be able to serve diverse populations and needs in various ministerial organizations. What areas do you see this friar needing to expand or improve his ministerial skills? Can you suggest a ministry setting that would be helpful for his development?**

Appendix J

Solemn Vows Discernment Tool

The following tool is a reflection exercise to assist you in preparing for solemn vows. This is not the letter for solemn vows. It will not go into your formation file. It is designed to help you review and savor your spiritual journey with God. It is personal and reflective and should be entered into with a spirit of openness, trust, creativity, and generosity. Do not rush your reflection. It is not an academic exercise. It is a prayerful letter to God. Your writing should reflect your personality, your strengths and limitations, areas in need of growth and places of accomplishments. We suggest that you address it to God and write in a conversational tone as if you were talking directly to God in a personal and loving way.

1. Clear articulation of spiritual journey (like a spiritual autobiography or witness talk)

Think about your experience of life before becoming a Capuchin and how you came to know God and yourself in the eyes of God.

What were pivotal moments or events in your life (not necessarily spiritual but could be) such as obstacles, setbacks, challenges, joys, hopes, etc? First name them for yourself and then choose the ones that you think were most informative for you in your previous life before entering religious life... What decisions did you make in these moments? How were you affected by these moments? What did they bring out in you? Who were you back then?

Looking back now on those situations, can you identify God's presence and providence in those moments that have helped form you to be the person you are today? Describe.

**The closing question to think about:
How have you come to know that you are known and loved by God?**

2. Capuchin Life in formation

The overarching question for this section is: How has God formed you through the lived experience of Capuchin life?

Things to ponder: Why Capuchin? Why not another religious order? Why not the other Franciscan orders?

What has been a surprising joy in your years of formation? What has been an unanticipated obstacle or unexpected setback? What has caused you disillusionment? How have you responded to these factors?

For what are you grateful in your years of formation? Do you think your friends and family notice change in you? How so?

Can you identify and articulate a tension between your understanding of Capuchin ideals and the way you live them in daily life?

An important aspect of formation is growing in affective maturity. How would you describe this growth in you? How has your understanding of affective maturity changed over the years....

The closing question to think about:

How have you come to know that you belong with us as a Capuchin?

3. How do you articulate the call and respond to it?

The sense of call deepens and gets clarified over time. (A candidate is aware of and talks about call very differently than a Postulant. A Novice has an even deeper sense of call and discernment before first profession. Same is true for solemn vows.) How is this true for you? How would you describe each of these stages for you?

Faith is a response to the revealing God. How has God revealed Himself to you? How have you responded? How do you want to respond in the future?

The vows of poverty, chastity and obedience are a radical response to a loving God. Why are you choosing these vows to respond to God? How has God received your gift? How has your lived experience of the vows (both grace and difficulty) developed and grown over the years? Give examples? How have you been changed and transformed by living the vows? How do you talk about your consecration to God?

How do you demonstrate the capacity and balance for personal relationships where intimacy needs are met without imposing your needs on the fraternity, friends, or people in ministry? How do you integrate the emotions of compassion, tenderness, and gentleness, with the characteristics of assertiveness, clarity, and initiative in regard to relationships? Are your boundaries too strict or not clear enough?

How do you hold yourself accountable? What is your experience of fraternal correction - both giving and receiving correction? In what ways are you expanding your capacity to live with patience and humility? Does anger or disturbance interfere or hinder your ability to be obedient?

Each friar in the Province of St. Mary lives the vows differently and uniquely. How do you see yourself living the vows in the future? Who are your role models? Who are the friars you don't want to imitate? (This is for your personal reflection and not intended to be shared with us with specific names of friars, but think about why you would not want to imitate them... Are you able to love them in their weaknesses/differences?) How would you honestly assess your living the vows now?

Summary question: How are you integrating your previous life (section 1) with your Capuchin life (section 2) into a future vowed life of consecration (section 3)?

Appendix K
Ministerial Skills for Post-Novitiate Friars:

1. Witnesses to Gospel Life
2. Engages with Issues of Justice, Peace and Integrity of Creation;
3. Leadership and Affective Maturity
4. Cross Cultural Competency

SKILL ONE: WITNESSES TO GOSPEL LIFE

<u>Skill</u>	<u>Level</u>	<u>Comments/Examples</u>
Witnesses to Gospel Life	Novice Approaching Proficiency Proficiency Above Proficiency	
Embraces the “lepers of today”: imprisoned, elderly, youth, homeless, addicted, LGBTQ, migrants, etc.		
Integrates Prayer into Ministry and Ministry into Prayer		
Practices a Ministry of Presence – esp. to the marginalized		
Engages in CFM Programs &/or Offers Other Types of Retreats		
Preaches in Liturgical & Devotional Settings		
Accompanies Secular Franciscans		
Engages in Family Ministry		
Appropriately Uses the Media to communicate the message of faith		
Responds to Questions of Faith		
Preaches with Action		

SKILL TWO: ENGAGES WITH ISSUES OF JUSTICE, PEACE & INTEGRITY OF CREATION

<u>Skill</u>	<u>Level</u>	<u>Comments/Examples</u>
Engages with Issues of Justice, Peace, and Integrity of Creation	Novice Approaching Proficiency Proficiency Above Proficiency	
Promotes Community Outreach, Justice and Peace Programs		
Builds Relationships with Diverse Cultural Groups		
Mediates Theologically Diverse Intra-ecclesial Perspectives		
Engages in Ecumenical and Interfaith Dialogue and Activity		

SKILL THREE: LEADERSHIP AND AFFECTIVE MATURITY

<u>Skill</u>	<u>Level</u>	<u>Comments/Examples</u>
Leadership & Affective Maturity	Novice Approaching Proficiency Proficiency Above Proficiency	
Mentors Others		
Inspire & Guide Individuals and Groups		
Manages Conflict		
Practices Accurate Self-Assessment		
Pursues Growth in Affective Maturity		
Collaboration		
Practices Community Organizing		

Situationally Aware & Takes Initiative		
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SKILL FOUR: CROSS CULTURAL COMPETENCY

<u>Skill</u>	<u>Level</u>	<u>Comments/Examples</u>
Cross Cultural Competency	Novice Approaching Proficiency Proficiency Above Proficiency	
Experiences & Expresses Franciscan Minority		
Able to Speak Spanish or Another Language		
Able to Live & Minister in Various Cultural Values & Assumptions		
Curious & Open-minded		

Appendix L
Duties and Tasks of Priests: A Pastoral Assessment
A Check-List of Pastoral Skills

The Profile names the nine ministerial duties of a Catholic priest:

1. Celebrates liturgy and sacraments;
2. Provides Pastoral care and spiritual guidance;
3. Teaches the faith;
4. Leads pastoral administration;
5. Practices a ministry of presence with parish groups;
6. Participates in the life of the diocesan church;
7. Engages with diverse publics;
8. Engages in professional development;
9. Engages in personal development.

DUTY ONE: CELEBRATES LITURGY

<u>Duty</u> Celebrates Liturgy	<u>Level</u> Novice Approaching Proficiency Proficiency Above Proficiency	<u>Comments/Examples</u>
Celebrates the Eucharist		
Preaches Liturgical Homilies		
Initiates Children and Adults (Baptism, Confirmation, Eucharist)		
Celebrates the Sacraments of Healing and Reconciliation		
Officiates at Weddings		
Celebrates Funerals		
Leads Devotional Practices		
Coordinates Liturgical Events and Training		

DUTY TWO: PROVIDES PASTORAL CARE AND SPIRITUAL GUIDANCE

<u>Duty</u>	<u>Level</u>	<u>Comments/Examples</u>
Provides Pastoral Care and Spiritual Guidance	Novice Approaching Proficiency Proficiency Above Proficiency	
Visits the Sick and others in need		
Counsels Parishioners		
Offers Spiritual Direction and Retreats		
Applies Canonical Procedures		

DUTY THREE: TEACHES THE FAITH

<u>Duty</u>	<u>Level</u>	<u>Comments/Examples</u>
Teaches the Faith	Novice Approaching Proficiency Proficiency Above Proficiency	
Evangelizes the Community and Culture		
Models a Living Witness of the Gospel		
Implements RCIA Processes		
Prepares People for Sacraments		
Supervises Faith Formation Programs		
Responds to Questions of Faith		
Uses the Media to communicate the message of faith		

DUTY FOUR: LEADS PASTORAL ADMINISTRATION

<u>Duty</u>	<u>Level</u>	<u>Comments/Examples</u>
Leads Pastoral Administration	Novice Approaching Proficiency Proficiency Above Proficiency	
Oversees Strategic Planning Grounded in Gospel Values and Diocesan Mission		
Leads Parish Pastoral and Finance Councils		
Oversees Parish Programs, Ministries and Apostolates		
Oversees the Stewardship of Parish Finances		
Employs and Manages Parish Staff		
Supervises the Maintenance of Physical Plant		
Supervises Parish Communication		

DUTY FIVE: PRACTICES A MINISTRY OF PRESENCE

<u>Duty</u>	<u>Level</u>	<u>Comments/Examples</u>
Practices a Ministry of Presence with Parish Groups	Novice Approaching Proficiency Proficiency Above Proficiency	
Participates with Individual Parish Groups		
Interacts with People in Informal Contexts		
Acts as Liaison among Parish Groups		
Visits Schools/ Religious Education Programs		

DUTY SIX: PARTICIPATES IN THE LIFE OF THE DIOCESAN CHURCH

<u>Duty</u>	<u>Level</u>	<u>Comments/Examples</u>
Participates in the Life of the Diocesan Church	Novice Approaching Proficiency Proficiency Above Proficiency	
Cooperates with Bishop		
Encourages Candidates for Church Ministries		
Collaborates with Presbyterate, Deacons, Religious, and Lay Ecclesial Mts.		

DUTY SEVEN: ENGAGES WITH DIVERSE PUBLICS

<u>Duty</u>	<u>Level</u>	<u>Comments/Examples</u>
Engages with Diverse Publics	Novice Approaching Proficiency Proficiency Above Proficiency	
Promotes Community Outreach, Justice and Peace Programs		
Builds Relationships with Diverse Cultural Groups		
Mediates Theologically Diverse Intra-ecclesial Perspectives		
Engages in Ecumenical and Interfaith Dialogue and Activity		

DUTY EIGHT: ENGAGES IN PROFESSIONAL DEVELOPMENT

<u>Duty</u>	<u>Level</u>	<u>Comments/Examples</u>
Engages in Professional Development	Novice Approaching Proficiency Proficiency Above Proficiency	
Maintains a Habit of Theological Reading and Reflection		
Acquires New Skills for Ministry		
Engages in Ministerial Self-Evaluation on a Regular Basis		
Contributes to the Development of the Profession		
Develops a Collaborative Leadership Style		

DUTY NINE: Engages in Personal Development

<u>Duty</u>	<u>Level</u>	<u>Comments/Examples</u>
Engages in Personal Development	Novice Approaching Proficiency Proficiency Above Proficiency	
Maintains a Life of Prayer		
Receives spiritual direction on a regular basis		
Participates in yearly retreat		
Nurtures Health Friendships (family/friends)		
Maintains Health (diet, exercise, physical-mental health)		

Appendix M

Letter to the Provincial Requesting Perpetual Profession

The procedure for requesting perpetual profession requires two letters to the Provincial. The first letter should be handwritten. In this letter the candidate should:

- 1) Ask the provincial's approval for admission to perpetual vows.
- 2) Indicate that you are making this commitment in freedom and without pressure from anyone (presuming this is true).

The second letter can be typed. The following questions are to be answered by the candidate for perpetual profession and a copy submitted to the post-novice's Formation Advisor prior to sending it to the Provincial Minister. This letter will then be sent to the provincial and a copy placed in the post-novice's personnel file at the Provincialate.

- 1) Explain in some detail your understanding of the vow of poverty. Explain what you believe your obligations will be as a result of professing this vow in the Capuchin Order.
- 2) Explain in some detail your understanding of the vow of chastity. Explain what you believe your obligations will be as a result of professing this vow.
- 3) Explain in some detail your understanding of the vow of obedience. Explain what you believe your obligations will be as a result of professing this vow.
- 4) Express your desire to commit yourself to the Capuchin way of life. Include the way in which you have owned the characteristics of Capuchin life: fraternity, contemplative prayer, service to the poor, work, and penance.
- 5) Indicate that you are aware of the seriousness of the commitment you are about to make, and the reasons why you are ready to do so.
- 6) Tell of your intention to commit your life to the Capuchin Franciscan Order.

Appendix N

Procedural and Ceremonial Checklists for Temporary Simple Profession and Perpetual Solemn Profession of Vows

*In accordance with the liturgical principle of progressive solemnity, the temporary profession of vows will be rather simple in nature and will be relatively unchanged annually including music/readings.

Key Individuals in the Planning process:

Brother to be Professed (BP):

Provincial Minister (PM):

Master of Ceremonies (MC):

Pastor of Host Parish (HP):

Provincial Delegate for Initial Formation (PDIF):

Formation Council (FC):

Responsibilities of these individuals:

Provincial Minister:

- Informs BP of date/place of profession.
- Selects a trained MC to assist in preparations.
- Attends rehearsal at his convenience.
- Asks secretary to compose necessary paperwork.

Provincial Delegate for Initial Formation:

- Determines date/place for ceremony with PM & FC.
- Schedules date/place of ceremony and consults with HP.
- Coordinates and divides tasks with MC including:
 - Invitation (distributed digitally)
 - Worship aid (adapted from previous year's profession)
 - Printed materials for liturgy (Constitutions, vows formula, etc.)
- Determines preacher for ceremony with FC and informs MC.
- Asks a trained MC on behalf of PM to assist in preparations.
- Obtains necessary paperwork from provincial secretary and returns it in timely manner.
- ensures BP has fulfilled canonical obligations.
- Submits a final breakdown of expenses to Provincial treasurer.

Master of Ceremonies (MC):

- Communicates with HP regarding the music, servers, etc.

- Informs Pastor whether music ministry will be required.
- Adjusts and prints (or delegates) Worship Aid.
- Contacts designated preacher.
- Communicates with HP/guardian regarding simple reception and makes necessary arrangements.
- Conducts rehearsal at PM convenience.
- Selects 2nd reader among the friars attending.

Pastor of Host Parish (HP):

- Inquires availability of parish music ministry and puts MC in contact with director of music ministry.
- Facilitates coordination of preparation/clean up responsibilities for ceremony and reception with Parish/fraternal community and MC (expense of POSM).
- Provides simple floral arrangements (expense of POSM).

Brother to be Professed (BP):

- Receives digital copy of invitation to send to maximum **25** people for temporary profession and 75 for perpetual profession.
- Selects two (2) witnesses and contacts them.
- Selects one (1) reader (1st reading) for temporary profession and a second (2) reader for perpetual profession.

Checklist of Preparations:

Preparations for ceremony:

- ___ Invitations.
- ___ Worship aid adjusted.
- ___ Worship aid printed.
- ___ Decorations/Flowers
- ___ Caterer contacted
- ___ Caterer compensated
- ___ Reception coordinator
- ___ Set up for reception crew organized.
- ___ Clean-up of crew reception crew organized.

Liturgy Planning:

Music:

- ___ Cantor contacted

- ___ Organist contacted
- ___ Compensated
- ___ Music selected (see appendix)
- ___ Music shared with organist/cantor
- ___ Adjustments to selected music shared with composer of Worship Aid

Liturgical Preparations:

- ___ Readings selected (see: Order of Profession in the Franciscan Order)
- ___ 1st Reader selected by BP and informed by BP.
- ___ 2nd Reader selected by BP and informed by BP (solemn profession only)
- ___ Prayer of the Faithful composed and printed.
- ___ Proclaimer or Prayer of the Faithful identified and contacted.
- ___ Selected readings and Prayer of the Faithful printed in binder for ambo.
- ___ Call of BP identified and contacted.
- ___ Printed Response for BP.
- ___ Printed Vows Formula text for BP.
- ___ Book of Gospel for profession.
- ___ Rite of Temporary Profession properly ribboned or printed.
- ___ Roman Missal properly ribboned or printed.
- ___ Constitutions of the Order of Capuchin Friars Minor
- ___ Acolytes identified and contacted
- ___ Rehearsal scheduled
- ___ Document for BP to sign at conclusion of ceremony.
- ___ Caperone returned to PDIF

Appendix:

Liturgical Roles:

Master of Ceremonies:

Cantor:

Hospitality/Greeters:

Acolytes:

1st Reader (selected by BP):

2nd Reader (For Solemn Profession only: Selected by BP):

Presenter to Provincial:

Prayer of the Faithful Reader:

Witness (selected by novice):

Witness (selected by novice):

Music Selections:

Selected by PDIF/MC for temporary profession and by the BP for perpetual profession

Opening Hymn:

Penitential Act:

Psalm

Gospel Acclamation:

Embratio Hymn:

Offertory Hymn:

Mass Setting:

Communion Hymn:

Closing Hymn:

Readings/Readers selection:

(See the Rite of Ordination for options)

Selected by PDIF/MC

1st Reading:

Psalm:

2nd Reading:

Prayer of the Faithful:

Appendix O

Procedure for Admission to the Priesthood in the Province of St. Mary of the Capuchin Order

After a suitable time of experience as a transitional deacon, the candidate for ordination to the priesthood informs the director of presbyteral formation of his intention and desire to continue the process of presbyteral ordination as a Capuchin Franciscan. The director should assist the candidate prepare the following documents in 3 stages: Request, Scrutiny, Declarations

Stage 1: Request

- The *Code of Canon Law* identifies several prerequisites for ordination. Canon 1036 states:

In order to be promoted to the order of...presbyterate, the candidate is to present to his bishop or competent major superior a declaration written in his own hand and signed in which **he attests that he will receive the sacred order of his own accord and freely and will devote himself perpetually to the ecclesiastical ministry and at the same time asks to be admitted to the order to be received** (Canon 1036).

Thus, the candidate for ordination to the priesthood should *handwrite* a simple letter to the minister provincial strictly with the above bolded information. Please sign and date the letter.

- Through his presbyteral formation, the candidate for ordination to the priesthood should be prepared to exercise his role in the hierarchical Church as a Lesser Brother. We first invite the candidate to first consider the following quotations prayerfully from *the Constitutions of the Capuchin Friars Minor* and the Decree on the Ministry and Life of Priests (*Presbyterorum Ordinis*).

Inflamed by the Holy Spirit, Saint Francis, drew from his adoration of the Father, Who is the highest Good, that sense of universal brotherhood which enabled him to see in every creature the image of Christ, the firstborn and Savior. As children of this Father we regard ourselves as brothers of all without any distinction. When we encounter every creature with a brotherly spirit, we continually offer the praise of creation to God, the source of all good (*Constitutions*, 13).

Filled with the Holy Spirit, he is guided by Him who desires the salvation of all men. He understands this desire of God and follows it in the ordinary circumstances of his everyday life. With humble disposition he waits upon all whom God has sent him to serve in the work assigned to him and in the multiple experiences of his life. However, the priestly ministry, since it is the ministry of the Church itself, can only function in the hierarchical union of the whole body.

Pastoral charity, therefore, urges priests, as they operate in the framework of this union, to dedicate their own will by obedience to the service of God and their fellow men (*Presbyterorum Ordinis*, 15).

Utilizing these (or other sources), the candidate writes a typed letter addressed to the provincial minister that articulates his understanding of his vocation to priesthood in the context of his vocation to be a Capuchin brother. This is *not* to be an academic exercise; rather, a demonstration to the provincial and province that he has wrestled with this tension and his desire to continue to be both priest and brother in the world. The candidate for priesthood should seek assistance from the director of presbyteral formation for clarifications or further discussion. He is encouraged to share his letter with someone for editing purposes before printing a final draft.

- The candidate for priesthood should assemble and mail the two letters together to the provincial minister for review. Upon reception, the provincial minister or his duly appointed secretary should inform the candidate and the director of presbyteral formation of his reception of the request.

Stage 2: Deacon Board

In compliance with the Code of Canon Law, which states:

Can. 1051 The following prescripts regarding the investigation about the qualities required in the one to be ordained are to be observed:

1. There is to be a testimonial of the rector of the seminary or house of formation about the qualities required to receive the order, that is, about the sound doctrine of the candidate, his genuine piety, good morals, and aptitude to exercise the ministry, as well as, after a properly executed inquiry, about his state of physical and psychic health;
2. In order to conduct the investigation properly, the diocesan bishop or major superior can employ other means which seem useful to him according to the circumstances of time and place, such as testimonial letters, public announcements, or other sources of information.

The following procedures should be followed for stage 2:

After the provincial minister receives the request for ordination from the candidate, he instructs the director of priestly formation to set up a “deacon board” that will inform the director’s testimonial letter of recommendation to the provincial minister. The deacon board should be selected by the Pastor/direct supervisor of the parish/community where the candidate serves as deacon. The pastor may consult with the candidate about whom he should select as members; however, this is not required.

The board consists of the following members:

1. The Pastor and/or direct supervisor of the candidate

2. 1-2 parish staff members
3. 2-3 parishioners (or those who have observed the deacon candidate's ministry)

Possible members may include:

- Parochial vicar and/or assigned permanent deacon (PV should at least be consulted by pastor if not a member).
- Active parishioners of the parish/community who regularly attend weekend Mass.
- Parish volunteers.
- Parents of children whom the candidate has baptized during his time as deacon.
- Candidates for confirmation in the RCIA program.
- Mature candidates for confirmation in the confirmation program (see note below)
- Participants in programs run/offered by the candidate.
- Director of faith formation, office management, pastoral staff, custodial staff, etc.

Please note, these individuals should **not** be consulted for the deacon board:

- Unbaptized RCIA catechumens.
- Those individuals who see the candidate for spiritual direction.
- Baptized Christians under the age of 13. (Those individuals of ages 13-18 should have a parent present for the consultation).

The director may also return to the candidate's former ministerial directors for further input if needed.

The following questions should be answered at the start of the meeting that will not be discussed:

1. Would you feel confident/comfortable to receive the Sacrament of Penance from (Candidate)? Y / N
(If no, please explain below. All answers remain private/anonymous)
2. Is there any reason that (candidate) should not be ordained? Y/ N
(If yes, please contact the Pastor to arrange a meeting with the Director of Presbyteral Formation.)

The following questions will be asked to be discussed at the board meeting:

1. How is (**candidate**) received by the people of God at (**Parish/community**)?
2. How does (**candidate**) ministry in the parish reflect a spirit of service?
3. What do you find helpful about his preaching/teaching method/style?
4. Are there any points of growth that (**Candidate**) should be aware?
5. Do you, as the people of God, recommend presenting (**Candidate**) to the bishop to partake in the priesthood of Jesus Christ in the Roman Catholic Church?

After the board meeting, the director of presbyteral formation speaks directly with the Pastor about his insights/ recommendations. The director of presbyteral formation writes a letter of recommendation to the provincial minister for a final decision regarding the candidate's readiness for ordination to the presbyterate.

The candidate is encouraged to arrange individual meetings with both the pastor and director of presbyteral formation to discuss the board's conversation.

Stage 3: Approval

The provincial minister, after consultation with his council, informs the candidate of his decision via telephone. A letter should proceed the communication.

Appendix P

Ordination to the Priesthood Checklist

Key Individuals in the Planning process:

Ordandi:
Provincial Minister:
Ordaining Bishop:
Master of Ceremonies (MC):
Pastor of Host Parish:
Director of Priestly Formation:

Responsibilities of these individuals:

Provincial Minister:

- Consults and decides with brother to be ordained and pastor of host parish 3-4 potential dates for ceremony
- Schedules date/place of ordination with desired Bishop.
- Selects and asks a trained MC to assist ordinandi in preparations.
- Informs Ordandi of date/place of Ordination and MC.

Brother to be ordained:

- Coordinates and divides tasks with MC.
- Determines a budget of expenses with MC
- Selects music, readings, readers, etc.
- Assembles (or assigns someone to assemble) Worship Aid.
- Selects food for reception with caterer suggested by Pastor.

Master of Ceremonies:

- Facilitates communication between Pastor of Parish and Ordandi regarding the music, servers, etc.
- Informs Pastor whether music ministry will be required.
- Communicates with Pastor regarding reception and makes necessary arrangements.

Pastor of Host Parish:

- Inquires availability of parish music ministry and puts Ordandi in contact with director of music ministry.
- Facilitates coordination of preparation/clean up responsibilities for ceremony and reception with Parish/fraternal community and MC.
- Informs Ordandi whom to contact for floral arrangements.
- Informs Ordandi whom to contact for catering.

- Attends or appoints Parochial Vicar to attend rehearsal providing assistance to MC.

Director of Priestly Formation

- Obtains necessary paperwork from provincial secretary and returns it in timely manner.
- ensures ordandi has fulfilled canonical obligations.
- Submits a final breakdown of expenses to Provincial treasurer.

Checklist of Preparations:

Canonical Requirements:

___ Oath of Fidelity*

___ Profession of Faith*

*(Composed by Provincial Secretary and conducted by Director of Priestly Formation)

___ Five-day retreat (500 dollars allotted)

___ Dimissorial Letter (Provincial Secretary contacts celebrating Bishop)

Preparations for ceremony:

___ Invitations (prepared or delegated by Ordinandi)

___ Worship aid assembled.

___ Worship aid printed.

___ Decorations/Flowers ordered/paid

___ Caterer contacted

___ Caterer compensated

___ Individuals to serve at reception

___ Set up for reception crew identified and informed of role

___ Clean-up of crew reception crew identified and informed of role

___ Holy Card

Options: www.personalizedholycards.com.

One may choose either use a stock photo or upload your own. They will provide a proof that you approve before they print it.

Another option is to ask a funeral home to make laminated prayer cards.

___ Vestments

White –for ordination

Color of Sunday for Mass of Thanksgiving

___ Chalice + Paten

___ Manuturgium – (At the initiative of the ordandi)

Liturgy Planning:

Music:

___ Cantor contacted

___ Organist contacted

___ Compensated

___ Music selected (see “names and decisions” below)

___ Music selected and shared with organist/cantor

___ Music selected and shared with composer of Worship Aid

Liturgical Preparations:

___ Readings selected (see “names and decisions” below)

___ Readers selected and informed.

___ Prayer of the Faithful composed.

___ Proclaimer or Prayer of the Faithful identified and contacted.

___ Selected readings and Prayer of the Faithful printed in binder for ambo.

___ Presenter to the Bishop identified and contacted.

___ Vesting priest identified and contacted

___ Presenters of offertory gifts identified and contacted.

___ Bishop MC/Secretary contacted

___ Rite of ordination properly ribboned or printed.

___ Roman Missal properly ribboned or printed.

___ Printed text for calling forth ordandi/presentation to the Bishop.

___ Acolytes identified and contacted

___ Rehearsal scheduled

Documented names and decisions:

Liturgical Roles:

Cantor:

Hospitality/Greeters:

Acolytes:

Deacon:

1st Reader:

2nd Reader:

Presenter to Bishop:

Vesting Priest:

Prayer of the Faithful Reader:

Offertory presenter:

Music Selections:

Prelude:

Opening Hymn:

Penitential Act:

Gloria Mass Setting:

Psalm

Gospel Acclamation:

Litany of Saints:

Laying of hands hymn/music:

Kiss of Peace hymn/music:

Offertory Hymn:

Mass Setting:

Communion Hymn:

Post Communion meditation:

Closing Hymn:

Postlude:

Readings/Readers selection:

(See the Rite of Ordination for options)

1st Reading:

Psalm:

2nd Reading:

Prayer of the Faithful:

Appendix AA
Declaration of Freedom and Intent Before First Profession
Document as of April 2023. Maintained by Provincial Secretary
Printed on Provincial Letterhead

I, _____, also known at **Brother** _____, **O.F.M. Cap.**, the son of _____ and _____, born on the ____ day of _____, in the year _____,

DO SOLEMNLY AFFIRM BEFORE GOD,

and in the presence of **Br. [witness], O.F.M. Cap.**, and these Witnesses, that on the completion of the required period of probation, I intend to profess public, temporary religious vows in the Province of St. Mary of the Order of Friars Minor Capuchin.

MOREOVER, I testify that I do this freely and of my own accord, with no known force for fear from any source whatsoever. I declare also that, to the best of my knowledge, I am not bound by any impediment of either Canon Law or Capuchin Law that would prevent my profession from being both valid and licit.

I FURTHER DECLARE, it to be my sincere intention to bind myself before God and the Church by the public religious vows of poverty, chastity and obedience, according to the Rule of Brother Francis, confirmed by Pope Honorius and according to the mind of the Constitutions of the Order of Friars Minor Capuchin, observing common religious life in the Capuchin fraternity.

In affirmation of the truth of these statements,
I now touch my hand to the Holy Gospel
SO HELP ME GOD.

Signature of novice _____
Brother [Name], O.F.M. Cap.

Signature of the friar receiving the Oath _____
Brother [Name], O.F.M. Cap.

Witness _____

Witness _____

Friary _____

Location _____
City/State

Date _____

Appendix BB
Document of First Profession
Document as of April 2023. Maintained by Provincial Secretary
Printed on Provincial Letterhead

In accord with the norms found in the Constitutions of the Order of Friars Minor Capuchin, I hereby give witness that

I, _____, also known as **Brother** _____, **O.F.M. Cap.**, the son of Guadalupe Perez and Maria E. Serrano, born on the _____ day of _____, in the year _____,

Having been received as a Capuchin novice on the _____ day of _____ in the year of our Lord _____, have made profession of temporary, simple religious vows in the Province of St. Mary of the Order of Friars Minor Capuchin, into the hands of **Brother** _____, **O.F.M. Cap.**, at the _____, located at _____, on this _____ day of _____ in the year of our Lord _____, in the manner prescribed by the Constitutions, which is as follows:

For the praise and glory of the Most Holy Trinity! Since the Lord has given me this grace to follow more closely the Gospel and the footprints of Our Lord Jesus Christ, in the presence of my brothers here assembled, and into your hands, Brother Francis, with a firm faith and will: I vow to God the Father, holy and almighty, to live until _____ in obedience, without anything of my own, and in chastity.

At the same time, I profess to observe faithfully the life and Rule of the Friars Minor confirmed by Pope Honorius, and I promise to observe it faithfully according to the Constitutions of the Order of Capuchin Friars Minor.

Therefore, with all my heart I commit myself to this Fraternity, so that, through the effective working of the Holy Spirit, led by the example of Mary Immaculate, the united intercession of our Father Francis with all the saints, and with you helping me in brotherhood, I may strive for the fullness of love in the service of God, the Church, and all people.

Signature _____
Brother [Name], O.F.M. Cap.

Dated _____

Signature of the one receiving vows _____
Brother [Name], O.F.M. Cap.
Provincial Minister

Witness _____
Brother [Name], O.F.M. Cap.

Witness _____
Brother [Name], O.F.M. Cap.

Appendix CC
Document for Conferment of the Ministry of Lector/Acolyte
Document as of November 2023. Maintained by Provincial Secretary
Printed on Provincial Letterhead

I, the undersigned, [**Provincial Minister Name**], O.F.M. Cap., Provincial Minister of the Province of St. Mary of the Order of Capuchin Friars Minor, declare that, in conformity with the norms prescribed by the Church, on **Date**, have conferred the Ministry of Lector/Acolyte to the religious brother

[Name], O.F.M. Cap.

a member of the Province of St. Mary of the Order of Capuchin Friars Minor.

This same religious, observing the regulations of the Church and the provisions of the United States Conference of Catholic Bishops, is therefore authorized to exercise the aforementioned Ministry which has been duly received.

Given at **Friary, Location**
Date

Very Rev. [**Name**], O.F.M. Cap.
Provincial Minister

Witness

Appendix DD
Document for Renewal of Temporary Vows
Document as of April 2023. Maintained by Provincial Secretary
Printed on Provincial Letterhead

In accord with the norms found in the *Ordinances of the General Chapters of the Friars Minor Capuchin*, [2/16], I hereby give witness that:

I, _____, also known as **Br.** _____, **O.F.M. Cap.**, son of _____ and _____, born on the ____ day of _____, in the year of our Lord ____ and ____ year(s) after having made my first profession of vows, have renewed my profession of temporary, simple vows in the Province of St. Mary of the Order of Friars Minor Capuchin before **Br.** _____, **O.F.M. Cap.** at _____ **Friary**, located at _____ on the ____ day of _____, in the year of our Lord _____, in the manner prescribed by the *Constitutions* [21, 4], which is as follows:

For the praise and glory of the Most Holy Trinity I, **Brother** _____, since the Lord has given me this grace to follow more closely the Gospel and the footprints of Our Lord Jesus Christ, in the presence of my brothers here assembled, and into your hands, **Brother** _____, with a firm faith and will: I vow to God the Father, holy and almighty, to live until _____ my life in obedience, without anything of my own, and in chastity.

At the same time, I profess to observe faithfully the life and Rule of the Friars Minor confirmed by Pope Honorius, and I promise to observe it faithfully according to the Constitutions of the Order of Capuchin Friars Minor.

Therefore, with all my heart I commit myself to this Fraternity, so that, through the effective working of the Holy Spirit, led by the example of Mary Immaculate, the united intercession of our Father Francis with all the saints, and with you helping me in brotherhood, I may strive for the fullness of love in the service of God, the Church, and all people.

Signature _____

[Brother [Name], O.F.M. Cap.]

Dated _____

Signature _____

[Brother [Name], O.F.M. Cap.]
Provincial Minister

Witness _____

[Brother [Name], O.F.M. Cap.]
Director of Initial Formation

Witness _____

[Brother [Name], O.F.M. Cap.]
Director of Priestly Formation

Appendix EE

Letters to the Provincial Requesting Perpetual Profession

The procedure for requesting perpetual profession requires two letters to the Provincial. The first letter should be handwritten. In this letter the candidate should:

- 1) Ask the provincial's approval for admission to perpetual vows.
- 2) Indicate that you are making this commitment in freedom and without pressure from anyone (presuming this is true).

The second letter can be typed. The following questions are to be answered by the candidate for perpetual profession and a copy submitted to the post-novitiate's formation advisor prior to sending it to the provincial. This letter will then be sent to the provincial and a copy placed in the post-novitiate's formation file.

- 1) Explain in some detail your understanding of the vow of poverty. Explain what you believe your obligations will be as a result of professing this vow in the Capuchin Order.
- 2) Explain in some detail your understanding of the vow of chastity. Explain what you believe your obligations will be as a result of professing this vow.
- 3) Explain in some detail your understanding of the vow of obedience. Explain what you believe your obligations will be as a result of professing this vow.
- 4) Express your desire to commit yourself to the Capuchin way of life. Include the way in which you have owned the characteristics of Capuchin life: fraternity, contemplative prayer, service to the poor, work, and penance.
- 5) Indicate that you are aware of the seriousness of the commitment you are about to make, and the reasons why you are ready to do so.
- 6) Tell of your intention to commit your life to the Capuchin Franciscan Order.

Appendix FF
Letter Concerning the Renunciation of Goods & Conveyance of Property
Document as of April 2023. Maintained by Provincial Secretary
Printed on Provincial Letterhead

[DATE]

[NAME OF CANDIDATE]
[ADDRESS OF CANDIDATE]

Dear _____,

Peace and blessings!

In the Rule confirmed by Pope Honorius [Chapter 2], Brother Francis directed that:

If there are any who wish to accept this life and come to our brothers, let them send them to the ministers provincial, to whom and to no other is permission granted for receiving brothers...let the ministers speak to them the words of the holy Gospel that they should go and sell all that belongs to them and strive to give it to the poor. If they cannot do this, their good will suffices. And let the brothers and their ministers beware not to become solicitous over their temporal affairs, so that they may freely dispose of their goods as the Lord may inspire them.

Therefore, William, since you wish to accept our life, I recall for you the words of the Lord Jesus:

If you seek perfection, go, sell your possessions, and give to the poor. You will have treasure in heaven.
[Mt 19:21]

In conformity to the prescriptions of the Constitutions of the Order of Friars Minor Capuchin [21, 3], and in accordance with the norms contained in the Code of Canon Law [c.668, 3 and 4], I now direct that you dispose of all of your possessions, money and property **“as the Lord may inspire you,”** and that this be done **before** you make your profession of solemn, perpetual vows. Furthermore, I direct you to accomplish this with whatever formalities are necessary according to the norms of civil law. If legal counsel is needed, please make that known to me as soon as possible.

When you have disposed of all of your possessions, you will be eligible for solemn, perpetual profession in the Order of Friars Minor Capuchin. Please contact the director of the Post-novitiate Program as soon as you have divested yourself of your goods, money and property. ***Be mindful of the poor.***

Your brother,

Very Rev. _____ O.F.M. Cap.
Provincial Minister

Appendix GG
Disposition of Property
Document as of April 2023. Maintained by Provincial Secretary
Printed on Provincial Letterhead

I, _____, also known as Brother _____, O.F.M. Cap.,
the son _____ and _____, born in _____
_____, on the _____ day of _____ in the year _____, being about to make profession
of perpetual religious vows in the Province of St. Mary of the Capuchin Order, in keeping with the
requirements of the *Constitutions of the Order of Friars Minor Capuchin* and in accord with the norms in
the *Code of Canon Law*, do solemnly affirm that I dispose of all my worldly possessions, money and
property, in the following manner:

I declare that I have disposed of all my worldly possessions, money property and have done so freely and
of my own accord.

Furthermore, I do hereby freely and of my own account, assign, convey, transfer and give to the Province
of St. Mary of the Capuchin Order, a religious non-profit corporation any and all interest in and to property
(both real and personal) which I may acquire in the future (whether by gift, remuneration, bequest or
otherwise). I dispose of all property solely because of my desire and commitment to fulfill the religious
ideals and principles of the Capuchin Order within the Roman Catholic Church.

I duly solemnly affirm that in disposing of my property, I have fully informed myself of the legal effect
thereof. I have not relied upon any representation, promises or assurances made by anyone in the Capuchin
Order, nor have I received any legal consideration from the Capuchin Order or any of its members for so
doing.

Dated the _____ of _____, in the year of Our Lord _____.

-Candidate

-Witness

-Witness

Appendix HH
Last Will and Testament (3 pages)
Document as of April 2023. Maintained by Provincial Secretary
Printed on Provincial Letterhead
LAST WILL AND TESTAMENT

I _____ also known as _____ O.F.M. Cap.
son of _____ and _____
born on the _____ day of _____ in the year _____
do hereby revoke any prior wills and codicils, and make this my will and testament.

ARTICLE ONE-PAYMENT OF EXPENSES

1. I direct my personal representative and executor of this will, hereinafter named, to pay the expenses of my last illness and funeral, and all valid debts owed by me at my death, as soon after my death, as soon after my decease as is convenient.

ARTICLE TWO-SPECIFIC GIFTS

2. I give the following:
 - 2.1 In sincere gratitude to the Giver of all Life and Source of all holiness, I commend myself to the mercy and enduring love of God.
 - 2.2 All the rest, residue and remainder of my property, real, personal and mixed, of whatsoever nature, kind or description, wheresoever situated, of which I may die seized or possessed, to which I may be entitled at the time of my death, or over which I may have any power of testamentary disposition, I hereby **GIVE, DEVISE and BEQUEATH** to the Province of St. Mary of the Capuchin Order—a religious, non-profit corporation, presently located at 30 Gedney Park Drive, White Plains, New York 10605, for its religious and charitable purposes.
 - 2.3 I am not unmindful of my relatives and friends. However, I have dedicated my life to following Jesus Christ in the manner of Brother Francis of Assisi by joining the Province of St. Mary of the Capuchin Order—a religious, non-profit corporation. Therefore, it is my will and intention that any and all worldly goods which I may have at the time of my death be given to the same Province of St. Mary of the Capuchin Order. I have omitted my relatives and friends from this, my Last Will and Testament, after due deliberation and with full intention, but with no malice or ill will. I do leave them all my love and affection, and a life dedicated to Jesus Christ the Lord.

ARTICLE THREE-PERSONAL REPRESENTATIVE

3. I nominate and appoint whoever at the time of my death shall hold the office of Secretary of the Province of St. Mary of the Capuchin Order—a religious non-profit corporation—as my personal representative and executor of this my Last Will and Testament.

- 3.1 Should his office as Secretary terminate before the completion of the administration of my estate, the President of the Province of St. Mary of the Capuchin Order, being also the Province Minister of the Province of St. Mary of the Order of Friars Minor Capuchin, who is in office at that time, shall have the power either to retain that same individual who had held the office of Secretary until the completion of the administration of my estate, or to nominate and appoint any additional or successor personal representative and executor of this my Last Will and Testament.
- 3.2 No bond shall be required of any personal representative nominated or appointed by the President of the corporation or me.

I have signed this WILL consisting of THREE (3) pages, this page included on:

_____ Date

_____ -Testator

We certify that in our presence on the date appearing above at: _____
 located at _____

_____, O.F.M. Cap. signed the foregoing instrument and acknowledged it to be his Last Will and Testament, that at his request and in his presence and in the presence of each other, we have signed our names below at witnesses, and that we believe him to be of sound mind and memory.

_____, O.F.M. Cap.
 Witness

Residing at: _____

_____, O.F.M. Cap.
 Witness

Residing at: _____

SELF-PROVED AFFIDAVIT

State of _____

County of _____

We _____, O.F.M. Cap. _____ and _____, O.F.M. Cap. _____

Whose names are signed to the attached or foregoing instrument, consisting of THREE (3) typewritten pages, being first duly sworn, do hereby declare to the undersigned authority that the TESTATOR signed and executed the instrument as his Last Will and Testament, that he signed it willingly, and that he executed it as his free and voluntary act for the purposes therein expressed; and that each of the witnesses, in the presence and hear of the Testator, signed the Will as witnesses, and that to the best of their knowledge the Testator was at the time 18 or more years of age, of sound mind and under no constraint or undue influence.

_____, O.F.M. Cap.-Testator

_____, O.F.M. Cap.-Witness

_____, O.F.M. Cap.-Witness

Subscribed, sworn to and acknowledged by _____, O.F.M. Cap. _____

the Testator, and subscribed and sworn to before me by _____, O.F.M. Cap. _____

and _____, O.F.M. Cap. _____, Witnesses, this _____ day of

_____ in the year of our Lord _____.

Appendix II
Declaration of Freedom and Intent Before Perpetual Profession
Document as of April 2023. Maintained by Provincial Secretary
Printed on Provincial Letterhead

I, _____, also known as, _____ O.F.M. Cap., the son of _____ and _____, born in _____, on the _____ day of _____ in the year _____, having made first profession of temporary vows _____ years ago, on the _____ day of _____ in the year _____, do solemnly swear before God and before you, _____ O.F.M. Cap., in the presence of these witnesses, that I intend to make profession of perpetual vows in the Province of St. Mary of the Capuchin Order.

Moreover, I testify that I do this of my own accord, with the sincere intention of binding myself for the rest of my life, before God and the Church, to the vows of poverty, chastity and obedience, according to the Rule of Brother Francis, confirmed by Pope Honorius, and according to the mind of the *Constitutions of the Order of Friars Minor Capuchin*, with the firm determination to observe the common religious life in the Capuchin fraternity.

I likewise declare that I am not being induced, coerced or compelled to make perpetual profession by any fear, force, violence or threats of any kind from any source whatsoever. To the best of my knowledge, I am not bound by any impediment of either Canon Law or Capuchin Law which would prevent this, my perpetual profession, from being both valid and licit.

I intend to make this profession with my full, free and total consent, excluding all deceit, simulation or conditions, even merely cognitive, which could limit my consent. In affirmation of the truth of these statements, I now touch my hand to the Holy Gospel; so help me God.

In testimony whereof, and before God and these Witnesses, I affix my signature.

, O.F.M. Cap.-Candidate

, O.F.M. Cap.-Witness

, O.F.M. Cap.-Witness

Dated
[LOCATION]

Appendix JJ
Document of Solemn, Perpetual Profession
Document as of April 2023. Maintained by Provincial Secretary
Printed on Provincial Letterhead

In accord with the norms found in the *Constitutions of the Order of Friars Minor Capuchin*, I hereby give witness that I, _____, also known as Brother _____ son of _____ and _____, born on the ___ day of _____ in the year _____ and now being _____ years of age, having been received as a Capuchin novice on _____, having made profession of solemn, perpetual vows in the Province of St. Mary of the Order of Friars Minor Capuchin into the hands of _____ at _____ located at _____ on this day _____ of _____ in the year of our Lord _____, in the manner prescribed by the Constitutions.

For the praise and glory of the Most Holy Trinity I, _____, since the Lord has given me this grace to follow more closely the Gospel and the footprints of Our Lord Jesus Christ, in the presence of my brothers here assembled, and into your hands, _____, with a firm faith and will: I vow to God the Father, holy and almighty, to live for the entire time of my life in obedience, without anything of my own, and in chastity.

At the same time, I profess to observe faithfully the life and Rule of the Friars Minor confirmed by Pope Honorius, and I promise to observe it faithfully according to the *Constitutions of the Order of Capuchin Friars Minor*.

Therefore, with all my heart I commit myself to this Fraternity, so that, through the effective working of the Holy Spirit, led by the example of Mary Immaculate, the united intercession of our Father Francis with all the saints, and with you helping me in brotherhood, I may strive for the fullness of love in the service of God, the Church, and all people.

, O.F.M. Cap.
Newly Professed

Brother _____, O.F.M. Cap.
Provincial Minister

Brother _____, O.F.M. Cap.
Witness

Brother _____, O.F.M. Cap.
Witness

Dated:

Appendix KK
Notification of Perpetual Religious Profession
Document as of April 2023. Maintained by Provincial Secretary
Printed on Provincial Letterhead

[Date]

Reverend Pastor

[NAME OF CHURCH]

[ADDRESS OF CHURCH]

[CITY, STATE, ZIP OF CHURCH]

Dear Father:

This is to respectfully inform you that _____, formerly of your parish pronounced perpetual vows in the Order of Friars Minor Capuchin at the [LOCATION, ADDRESS, CITY, STATE, ZIP] on [DATE].

[NAME] was born on [DATE OF BIRTH] and was baptized at [LOCATION, ADDRESS, CITY, STATE, ZIP] on [DATE] by [NAME OF CELEBRANT]. Please make the appropriate notation in your baptismal register in accordance with the prescriptions of **Canon 535, §2**, of the Code of Canon Law.

Thank you for your courtesy in this matter.

Sincerely,

[SEAL]

[NAME OF PROVINCIAL SECRETARY]

Provincial Secretary

Appendix LL
Dimissorial Letter: Diaconate
Document as of April 2023. Maintained by Provincial Secretary
Printed on Provincial Letterhead

By virtue of this letter, and after consultation with my Council, I grant permission to and approve **Br. _____, O.F.M. Cap.** for the reception of the Order of Deacon from Your Eminence/Excellency _____, for service in the Capuchin Franciscan Province of St. Mary.

By this letter, it is affirmed that the above-named candidate has complied with the following requirements:

- He has been baptized and confirmed.
- He became a perpetually professed member of the Capuchin Franciscan Order on _____.
- He has manifested his free intention to receive the Order of Deacon.
- He is of the required age.
- He has received approbation from the rector and faculty of the _____[school of theology] and has completed whatever studies might be required.
- He has received the ministries of lector and acolyte, has exercised them, and has observed the prescribed intervals between ministries.
- He has made the required Profession of Faith, Declaration of Freedom and fulfilled his spiritual obligations, including the retreat required by canon 1039.
- He is free of any impediments, irregularities, or censures, and his moral character corresponds to the requirement of the Order of Deacon he is about to receive.

Given at [Location] on [Date]

Very Rev. Father [Name], O.F.M. Cap.
Provincial Minister
Province of St. Mary of the Capuchin Order

Appendix MM
Dimissorial Letter: Presbyterate
Document as of April 2023. Maintained by Provincial Secretary
Printed on Provincial Letterhead

By virtue of this letter, and after consultation with my Council, I grant permission to and approve **Br. _____, O.F.M. Cap.** for the reception of the Order of Presbyterate from Your Eminence/Excellency _____, for service in the Capuchin Franciscan Province of St. Mary.

By this letter, it is affirmed that the above-named candidate has complied with the following requirements:

- He has been baptized and confirmed.
- He became a perpetually professed member of the Capuchin Franciscan Order on _____.
- He received the Order of Deacon on _____.
- He has manifested his free intention to receive the Order of Presbyterate.
- He is of the required age.
- He has received approbation from the rector and faculty of the _____[school of theology] and has completed whatever studies might be required.
- He has received the ministries of lector and acolyte, has exercised them, and has observed the prescribed intervals between ministries.
- He has made the required Profession of Faith, Declaration of Freedom and fulfilled his spiritual obligations, including the retreat required by canon 1039.
- He is free of any impediments, irregularities, or censures, and his moral character corresponds to the requirement of the Order of Presbyterate he is about to receive.

Given at [location] on [Date]

Very Rev. Father [Name], O.F.M. Cap.
Provincial Minister
Province of St. Mary of the Capuchin Order

Appendix NN
Profession of Faith Before Ordination to the Diaconate
Document as of April 2023. Maintained by Provincial Secretary
Printed on Provincial Letterhead

DECLARATION OF FREEDOM

I, the undersigned _____, **O.F.M. Cap.**, a member of the Order of Friars Minor Capuchin, in presenting this petition to the Superior of the Province of St. Mary of the Capuchin Order for the reception of the Order of Diaconate, after carefully considering the matter before God, do hereby certify under oath:

1. That in the reception of the Order of Diaconate I am moved by no coercion, compulsion, or fear, but am seeking it on my own accord, and do of my own full and free will desire to embrace it together with the obligations that are attached to it.
2. I acknowledge that I am fully informed of all the obligations that flow from the Order of Diaconate, and I freely embrace them, and resolve, with the help of God, to keep them faithfully during my entire life.
3. I declare that I clearly understand all that the vow of chastity and the law of celibacy prescribe, and I firmly resolve, with the help of God, to observe these obligations in their integrity until the end of my life.
4. Finally, I sincerely promise that I will always, according to the proper law of the Constitutions of the Order of Friars Minor Capuchin and the Code of Canon Law, most respectfully obey in all things which are commanded me by my Superiors according to the discipline of the Church, and I am prepared to give good example both in work and in word, so that in the reception of the Order of Diaconate I may be worthy to receive the reward which God has promised.

To all this I testify and swear upon these sacred Gospels which I touch with my hand.

Brother [Name], O.F.M. Cap.

Ven. Br. [Name], O.F.M. Cap.
Guardian

Dated

Appendix OO
Oath of Fidelity Before Ordination to the Diaconate / Presbyterate
Document as of April 2023. Maintained by Provincial Secretary
Printed on Provincial Letterhead

PROFESSION OF FAITH
AND
OATH OF FIDELITY TO THE APOSTOLIC SEE

I, _____, **O.F.M. Cap.**, with firm faith believe and profess all and everything that is contained in the symbol of faith, namely:

I believe in one God, the Father almighty, maker of heaven and earth, of all things visible and invisible.

I believe in one Lord Jesus Christ, the Only Begotten Son of God, born of the Father before all ages. God from God, Light from Light, true God from true God, begotten, not made, consubstantial with the Father; through him all things were made. For us men and for our salvation he came down from heaven, and by the Holy Spirit was incarnate of the Virgin Mary, and became man.

For our sake he was crucified under Pontius Pilate, he suffered death and was buried, and rose again on the third day in accordance with the Scriptures. He ascended into heaven and is seated at the right hand of the Father. He will come again in glory to judge the living and the dead and his Kingdom will have no end.

I believe in the Holy Spirit, the Lord, the giver of life, who proceeds from the Father and the Son, who with the Father and the Son is adored and glorified, who has spoken through the prophets.

I believe in one, holy, catholic and apostolic Church. I confess one Baptism for the forgiveness of sins and I look forward to the resurrection of the dead and the life of the world to come. Amen.

With firm faith I believe as well everything contained in God's word, written or handed down in tradition and proposed by the church—whether in solemn judgment or in the ordinary and universal magisterium—as divinely revealed and calling for faith.

I also firmly accept and hold each and every thing that is proposed by the same church definitively with regard to teaching concerning faith or morals.

What is more, I adhere with religious submission of will and intellect to the teachings which either the Roman pontiff or the college of bishops enunciate when they exercise the authentic magisterium even if they proclaim those teachings in an act that is not definitive.

Brother [Name], O.F.M. Cap.

Ven. Br. [Name], O.F.M. Cap.
Guardian

Dated

Appendix PP
Notification of Ordination to the Diaconate / Presbyterate
Document as of April 2023. Maintained by Provincial Secretary
Printed on Provincial Letterhead

[Date]

Reverend Pastor
[NAME OF CHURCH]
[ADDRESS OF CHURCH]
[CITY, STATE, ZIP OF CHURCH]

Dear Father:

This is to respectfully inform you that _____, formerly of your parish ordained to the Order of the Diaconate / Presbyterate by [NAME OF CELEBRANT] at the [LOCATION, ADDRESS, CITY, STATE, ZIP] on [DATE].

[NAME] was born on [DATE OF BIRTH] and was baptized at [LOCATION, ADDRESS, CITY, STATE, ZIP] on [DATE] by [NAME OF CELEBRANT]. Please make the appropriate notation in your baptismal register in accordance with the prescriptions of **Canon 535, §2**, of the Code of Canon Law.

Thank you for your courtesy in this matter.

Sincerely,

[SEAL]

[NAME OF PROVINCIAL SECRETARY]
Provincial Secretary