

TABLE OF CONTENTS

	Page Number
Introductory Materials	5
Philosophy	5
Description of the Formation Program	6
Initial Formation Policies	11
Job Descriptions	23
Initial Formation Council: Job Description	23
Provincial Director of Initial Formation: Job Description	25
Postulancy Admissions Board Policies	27
General Procedures and Shared Practices	28
Initial Formation Curriculum	28
Entrance Requirements for Catholic Theological Union	32
Personal Formation Files	33
General Procedures Regarding Evaluations	36
Recourse Procedures	38
Spiritual Direction: Procedures	39
Guidelines Checklist for Departures from Initial Formation	41
Formation in Relationships, Sexuality and Celibacy	42
The Candidacy Program	47
Capuchin Constitutions	47
Capuchin Vocation Directors: Job Description	48
Procedures for the Vocation Office	50
The Capuchin College Program Council	51
Procedures for Resident Candidates at St. Joseph Seminary	53

Practices of the Candidacy Program	55
The Postulancy Program	58
Capuchin Constitutions	58
Postulancy Program Directors: Job Description	59
Postulancy Program Procedures	61
Postulancy Evaluation Tool	64
The Novitiate Program	69
Capuchin Constitutions and General Comment	69
The Post-Novitiate Program	70
Capuchin Constitutions	70
Post-Novitiate and Ministry Formation Directors Job Descriptions	71
Post-novitiate Procedures	73
Post-novitiate Practices	76
The Process of Evaluation	78
Guidelines for Evaluation and Self-Evaluation	79
Guidelines for Ministry Evaluation	80
The Ministry Formation Program	81
Capuchin Constitutions	81
Study for the Presbyterate: Process & Criteria	82
Documents Used in Initial Formation	87
Capuchin Candidacy Program	88
Questionnaire Regarding Indebtedness	88
Commentary on the Questionnaire Regarding Indebtedness	89
Affidavit as to Debts and Other Financial Obligations	90
Agreement to Assume the Debt of Another	91

Questionnaire Regarding Impediments	92
The Postulancy Program	93
Letter of Acceptance to Postulancy	93
Declaration Concerning Remuneration	94
The Novitiate Program	95
Declaration of Freedom and Intent Before Novitiate	95
Impediments Regarding Entrance into Novitiate	96
On Reception into Novitiate	97
Letter of Delegation to Receive Novices	98
Will of Testator	99
Disposition of Income, Use and Administration of Property During Temp. Vows	103
Declaration of Freedom and Intent Before First Profession	105
Impediments to Making First Profession	106
Vow Formula for First Profession	107
Document of First Profession	109
Letter of Delegation to Receive a Brother's First Profession	109
The Post-Novitiate Program	110
Declaration of Freedom and Intent Before Renewal of Temporary Vows	110
Impediments to Renewing Temporary Vows	111
Vow Formula for Renewal of Vows	112
Document of Renewal of Temporary Vows	113
Letter of Delegation to Receive the Renewal of Vows	114
Declaration of Freedom and Intent before Perpetual Profession	115
Impediments to Making Perpetual Profession	116
Letter Concerning the Renunciation of Goods & Conveyance of Property	117

Disposition of Property	118
Last Will and Testament	120
Commentary on Last Will and Testament Before Perpetual Profession	123
Vow Formula for Perpetual Profession	124
Document of Solemn, Perpetual Profession	125
Letter of Delegation to Receive a Brother's Perpetual Profession	126
Notification of Perpetual Religious Profession	127
The Ministry Formation Program	128
Letter of Delegation to Install a Brother in the Ministry of Lector	128
Testimonial Letter after Being Installed in the Ministry of Lector	129
Letter of Delegation to Install a Brother in the Ministry of Acolyte	130
Testimonial Letter after Being Installed in the Ministry of Acolyte	131
Oath of Freedom Before Ordination to the Diaconate	132
Profession of Faith Before Ordination to the Diaconate	133
Oath of Fidelity Before Ordination to the Diaconate	134
Certificate of Ordination to the Diaconate	135
Notice to Parish—Ordination to the Diaconate	136
Oath of Freedom Before Ordination to the Presbyterate	137
Profession of Faith Before Ordination to the Presbyterate	138
Oath of Fidelity Before Ordination to the Presbyterate	139
Certificate of Ordination to the Presbyterate	140
Bishop's Certification of Ordination to the Presbyterate	141
Notice to Parish—Ordination to the Presbyterate	142

INTRODUCTORY MATERIALS

Philosophy (Procedural Level)

Our Capuchin way of life is a life of faith. It calls for a radical personal and community response to God's unconditional love. The call to conversion is heard in the history and traditions of family, community, church, and world. As Capuchins and followers of Francis of Assisi, we are called to ongoing conversion and renewal of our life. "Formation consists in conforming ourselves to the way of life of the Holy Gospel, an authentic path to holiness" (*Ratio Formationis* [hereinafter, RF] at 10). Initial formation provides opportunities for nurturing this process of conversion.

The Capuchin Province of St. Joseph attempts to create such an atmosphere and opportunities in order to foster and care for religious vocation. We offer experiences that contain the seeds of conversion for those attracted to our way of life. This process of conversion is assisted by the personal guidance and direction of Capuchin friars working in conjunction with other men and women around them. It is supported and strengthened by the interaction of community living. We walk with people through this process of conversion, helping them to respond to the call of the Holy Spirit. We pray with them, affirm them and confront them so that conversion continues in their lives.

Initial formation is a time to develop the habits and attitudes that create a lifelong openness to growth and conversion. It is holistic and integrative, with charismatic, human, spiritual, intellectual, and pastoral/missionary dimensions. Through personal, community and ministerial growth, the friar in initial formation learns our way of life. Initial formation offers a sound foundation for developing a life of prayer that is imbued by a sense of global ministerial activity that is shaped by the spirit of prayer. Brothers, working together, prepare those called to perpetual profession in our way of life.

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Description of the Formation Program (Procedural Level)

Introduction

The period of initial formation is a prolonged period of initiation into Capuchin life. “It is only by living that we learn how to live” (RF 1). As one walks through the process of initial formation, he increasingly learns of our life and its obligations, especially the vows. As his knowledge and experience of the life of the province grows, he can commit himself more deeply, step-by-step, to membership in the community. Similarly, through this process, the province can experience the quality and genuineness of the individual's commitment and assess his suitability for our way of life.

This gradually deepening commitment is the fruit of a process of personal contact, shared lived-experience, and formal instruction. This exposure includes all aspects of our life, including: personal and communal prayer; ministries; our fraternal economy; recreation and celebration; and mutual support and challenge. With each step in the program the bond between the individual and the community is deepened. The individual initiates this through his request to move on to each successive step of the process.

The province welcomes him by accepting him to each level of the Initial Formation Program. Our acknowledgment of this growing bond is celebrated through appropriate rites. The conclusion of this legal bonding comes with perpetual profession, although the natural process continues throughout one's life.

While initial formation concerns itself with the gradual insertion of men into our life, it is also concerned with their internal spiritual lives. The process of leaving behind an old way of life and acquiring a new way of life is a very personal experience. This process builds on the prior religious experiences, and it continues and is aided by formation in our way of life.

The goal of the formation process is to establish a personal religious foundation on which to build the communal aspects of our life by fostering and sustaining religious experiences in the lives of the participants. It involves encounters with the word of God, the Word made flesh (Jesus), those who have been marginalized (the leper), and creation (RF 17-44). It requires conversion in the context of fraternity, the church, and the world, a process that forces one to come to terms with one's blindness and wounds while also experiencing joy (RF 45-53).

Typically, these experiences can leave us feeling helpless and challenge our ordinary ways of perceiving life. This feeling often moves people to come to God and some to religious life. Unable to function well in our old surroundings due to this dissonance, we seek out solitary places to reflect on our experiences, as well as to seek advice and guidance from others. We long to discover meaning in our experiences. Gradually, we begin to understand life in a new way and to change our lifestyle and behavior. It is this personal experience that our formation program hopes to sustain and foster. It is a process that is intimately tied with the gradually deepening commitment to communal life in our province.

Both the personal search and the process of sustaining that search are the objects of our program. While our Formation Program is designed to assist this process in every way, the Capuchin Constitutions make it clear that the individual in formation is the principle though not exclusive agent of his own formation (Constitutions 24:5). This means that he assumes primary responsibility for his own formation and is accountable for it. He is not alone, however, and can rely on the accompaniment of the Holy Spirit, the church, the fraternity, and his formators, as well as those who are poor and on what Pope Francis has called “the existential peripheries” (RF 142-176).

“The process of initiation is a journey of growth: dynamic, personalized, gradual, integral, and continuous. Even though it is more intense in the first years, it last for the whole of life” (FR at Initial and lifelong formation are multi-dimensional. They involve the whole person and must therefore integrate all elements (RF 57-127):

- Charismatic—living as a friar minor (lesser brother)
- Human—learning to be a brother to all
- Spiritual—desiring God and God’s will
- Intellectual—thinking with mind and heart
- Pastoral/Missionary—proclaiming and building communion

The Candidacy Program

The Candidacy Program is a loosely-structured program that allows men who are interested in the Order to investigate our life without assuming significant responsibilities within the Order or the Order assuming responsibilities for them. It has several objectives: (1) to create opportunities for discerning and freely and responsibly choosing his vocation; (2) to create pathways for affective growth and self-giving following the example of Jesus; and (3) to present a Franciscan vision of the world (RF 215-217).

During this initial contact, the candidate can be involved in a variety of activities, studies, or employment. For younger men, this program offers the freedom necessary to maintain contact with the Order as a possible vocational choice while pursuing other personal goals and developmental needs.

While men participating in this program ordinarily do not live in a Capuchin community, they are invited to join us in the aspects of our life that may be helpful and desirable. Thus, candidates are invited to join members of the Order in their prayer and celebrations as well as those aspects of life in local communities that seem appropriate. Candidates are further invited to participate in the ministry of Capuchins in the areas in which they live.

Through these shared experiences of life, discernment with various friars, and more formal exposures to our prayer and ministry weekends, candidates have experiences that can help them decide if they wish to invest more in our way of life as postulants. They learn about the vows by observing and experiencing life in the province. At the same time, the Director of the Candidacy Program Director (i.e. the Director of the Capuchin Vocation Office) gains sufficient experience with interested men to know if they are suitable candidates for our way of life.

Candidates within two years following high school graduation may opt to be resident candidates at St. Joseph College Seminary on the campus of Loyola University in Chicago or in a special residential program at St. Clare of Assisi Friary in Chicago. Any candidate may ask to live in a local Capuchin community as a resident candidate.

The Postulancy Program

The centerpiece of the Initial Formation Program is the postulancy-novitiate experience. These programs are the only time in which the participants are involved full-time in the elements of the Initial Formation Program. Together they represent a significant deepening of the individual's bond with the province. Though postulants and novices have not yet taken the vows of poverty, chastity, and obedience they live as if they are vowed so that through experience, study, and reflection they begin to integrate the evangelical counsels into their lives.

Postulancy and the novitiate represent the active and reflective poles of the intensive initiation into our life, though each program contains elements of the other. This stage of initial formation addresses the radical demands involved in the choice to be a Capuchin.

The request for admission to postulancy acknowledges a serious desire to further explore Capuchin life. It requires giving up other educational, work and financial enterprises to freely avail oneself for full participation in a demanding program.

We assume that men coming to us have already had a variety of religious experiences. The Postulancy Program is designed to build on these experiences and provide additional ones with the goal of helping postulants, like St. Francis, to accept their own powerlessness and dependence on God. This experience, which is available to all people of faith, is the bedrock on which a sound and lasting vocation to our life is built. While there are various legitimate ways in which to pursue this goal, attention is given to providing activities and events that the postulants, as a group, can use for reflection. They are helped to come to religious insight into their past and present experiences.

The goal of the Postulancy Program is to help facilitate conversion by exposing the postulants to a variety of challenging environments and situations. Through these common experiences, the postulants can encounter and better appreciate the plights of people that are often hidden from the eyes of the average North American. In addition to awakening interest in social issues, particularly those of injustice, this stage of initial formation should also aid growth in one's personal relationship with Jesus Christ as well as deeper senses of self-awareness and autonomy (RF 234-236).

To manifest the spiritual value of these experiences, the Postulancy Program has the responsibility to bring them to reflection and prayer with the postulants, both as individuals and as community. More intensive prayer and periods of individual and group reflection are therefore essential parts of the Postulancy Program. The purpose of exposing postulants to intense economic, political or social situations may have educational value; but more importantly they have religious value, since our experiences of God occur in the context of our relationships and social realities around us.

"The postulancy marks the beginning of the journey of incorporation into the Order" (RF at 252). Participation in this process implies a significant strengthening of the individual's bond with the province. The province assumes full financial responsibility for the postulant: room and board, transportation, healthcare, etc. The postulant is expected to live within the general norms and policies of shared resources in the province. Accountability to the province is significantly higher. Postulants are expected (and will be helped) to develop more mature prayer practices and reflective tools. Basic instruction in the Catholic faith and learning and deepening community living skills are also critical elements of the program.

The Novitiate Program

Members of the Province of St. Joseph participate in the novitiate sponsored by the North American Pacific Capuchin Conference (NAPCC), which is a collaborative venture of the eight English-speaking provinces within the NAPCC. Members of the other English-speaking circumscriptions may also participate in the novitiate, a decision which is made on a case-by-case basis.

"The goal of the novitiate is to help the novice and the Order discern whether his vocation is to live the consecrated life as a Capuchin Franciscan in an integrated fashion" (NAPCC Novitiate Manual at 6). The Novitiate year provides the structure to allow the novice to enter an interior prayer life that is analogous to the "cave experience" of Francis of Assisi. Francis struggled with his own sinfulness, fears and weakness, as he sought God's mercy in his life. This dynamic of intense interior prayer, conversion and discernment is what the structures of the Novitiate year seek to create.

The novice enters the interior life more deeply and reflects on the experiences in his life, to come to an honest knowledge of himself and to responsibly discern whether God is leading the novice to profession of vows as a Capuchin Franciscan. This inward journey is essential for growing in the conviction that Christ and the gospel are at the center of one's life and understanding the consequences of walking in his footsteps in the spirit of St. Francis ((RF 258-260). This requires maturity on the part of the novice, who has the principal responsibility for his formation. It also presumes that a vocation to the religious life is a vocation inspired by faith, and thus presupposes the gift of faith in the heart of the novice.

Prayer, as an act of faith, disposes the novice to the activity of the Holy Spirit, who informs and guides the formation process, and leads him to conformity with Christ. It is in the heart that the novice encounters Christ in a personal and intimate relationship as did Francis in his prayerful experience of the cave. Fervent prayer, therefore, is essential and foundational to discernment and to the formation of the novice in the Capuchin Franciscan identity. The structure, elements, and rhythm of the novitiate program help to facilitate that process (NAPCC Novitiate Manual, Philosophy Statement, page 3).

The Post-Novitiate Program

The period of Post-Novitiate normally lasts from 3-6 years and may be extended in exceptional cases to a maximum of 9 years (Capuchin Constitutions 34:2, CIC 655, 657.2). It is intended to help the friar deepen his spirit of freedom and self-giving; strengthen his capacities for mutuality, transparency, and shared responsibility in fraternity; and “give witness to solidarity, justice and truth...with those who are suffering” (RF 278-280).

The Formation Council of the Province of St. Joseph has specified that, with some exceptions, a friar may request to begin a year of discernment toward perpetual profession after he completes three years in simple vows. The period of post-novitiate seeks to achieve a balance in the areas of ministry, community, academics, critical reflection, and skills development. These form the context for holistic Capuchin discernment.

Throughout initial formation, friars are expected to engage in ministerial, academic, and communal tasks that together form a full-time occupation. While the precise blend will vary from year to year as determined by the friar and his formators, it is assumed that all these elements—academic, ministerial, and communal—will be present. Some friars’ prior background and academic work may call for adjustment regarding academic and ministry expectations during Capuchin initial formation.

Regardless of academic and ministerial demands, full and generous participation in Capuchin fraternal life is expected. In addition, the post-novitiate period also includes identifiable moments of reflection. Summers are generally set aside for ministry in various locations around the province to give temporarily professed friars a wider understanding of our ministries and communities or to develop valuable skills, (e.g., language study or Clinical Pastoral Education, CPE) applicable to the province’s life and ministry.

The friars in this program continue to deepen their appreciation for and experience of our vows of poverty, chastity, and obedience so that they will be able to profess perpetual vows freely and knowingly at the end of post-novitiate formation.

The Ministry Formation Program

The state of consecrated life by its very nature is neither clerical nor lay (CIC 518.1). Hence it has its own value, independent of sacred ministry (*Vita Consecrata* 60). The identity of the Franciscan Order goes back to our form of evangelical life, which defines us as an Order of brothers and not as a clerical congregation. There the one vocation of the lesser brother, live in its lay or clerical expressions...is open to different itineraries for specific formation: one for those who have received the gift of living the religious vocation in its presbyteral expression, and another for those whose gift is to live its lay dimension (PCO VIII 42) (RF 298).

Ministry Formation has two equal applications:

- (1) Friars pursuing professional training that is not yet completed at their profession of perpetual vows; and
- (2) The period from the declaration of candidacy for ordination until ordination to the presbyterate.

At the point of perpetual profession, friars in Ministry Formation prepare a Formation Plan Document that they sign and is reviewed and signed by the Ministry Formation Director(s), the director of Continuing Education and the Provincial Minister. The formation areas, i.e., Human, Spiritual, Intellectual, and Pastoral, found in the Program for Priestly Formation (PPF) are also applicable to all friars in Ministry Formation. These are the basis for continual evaluation during the Ministry Formation Program.

The friars in this program continue to deepen their appreciation for and experience of Capuchin ministry and fraternity in the context of academic formation.

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Initial Formation Policies

The Initial Formation Program

Capuchin Initial Formation includes the following programs: Candidacy, Postulancy, Novitiate, Post-Novitiate and Ministry Formation (c.f. *Constitutions 23:4*)

Policies, Procedures, Practices

Formation *policy* statements are established by the provincial minister and his council, a higher authority in the Order, or the Church. Such policies must be implemented by the Formation Council. Formation *procedures* are established by the Formation Council. These must be implemented by the formation staffs. Formation *practices* are established by formation directors/assistant directors for their respective levels of formation. They are superseded or amended by their corresponding policies and procedures.

Cross Cultural Formation

Friars in initial formation will take part in cross cultural formation as outlined in the Formation Handbook.

Degree Programs

All degrees, both undergraduate and graduate, require the prior written approval of the Provincial Minister.

Only accredited degree programs will be considered for approval.

Friars in initial formation are expected to consult with and receive recommendations from the Director of Continuing Formation prior to requesting permission to pursue an undergraduate or graduate degree program. For his part, the Director of Continuing Formation will also consult with the director(s) of the Post-Novitiate program.

Prior to requesting permission from the Provincial Minister to pursue an undergraduate or graduate degree program, friars in perpetual vows are expected to consult with and receive a recommendation from the Director of Continuing Formation.

Evaluation Guidelines

Guidelines for evaluation at all levels of formation shall be developed by the Formation Council. The province recognizes that thorough screening and regular evaluation are essential to good formation and discernment. As noted in our Capuchin Constitutions (18:3):

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. The following must be observed:

- 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.

Program Description

The Formation Council shall provide a description of the formation program, both in general and for each level of formation.

Misconduct Policy

Applicants who have a credible allegation of abuse of a minor shall not be accepted into Capuchin Initial Formation. Friars in Initial Formation who abuse minors or vulnerable adults will not be allowed to continue in Capuchin Formation. Candidates or friars in formation who have acquired or intentionally viewed child pornography will not be permitted to enter or continue in initial Capuchin Formation and may be subject to criminal prosecution. A friar in initial formation who is unable to maintain appropriate boundaries with minors or vulnerable adults, despite clear guidelines and instruction, will not be permitted to continue in Initial Formation.

Personnel

The Formation Council shall identify future personnel needs for initial formation and provide to the Provincial Minister and Council the names of friars who may be able to fill these positions. The Provincial Minister, *in consultation with the Provincial Council*, approaches, appoints, and provides preparation for friars to fill these positions.

Recourse

The Provincial Formation Program provides recourse procedures at each level of initial formation.

Personnel Skills

Friars appointed to the Formation Council shall have or acquire the skills, abilities, and experiences necessary to fulfill their ministry. They will also continue training in the skills needed for their roles in formation. To this end, the Formation Council shall provide and update a list of the requisite skills, abilities, and experiences to be found in people working at each level of formation. These requisites are to be found in the composite of all members at each level.

Reapplication by Former Participants

When former participants in an initial formation program (including the province's) wish to (re)apply to the Province of St. Joseph, the following process shall be implemented:

- Applicants will engage the Capuchin Vocation Office (CVO) in an initial discernment regarding reapplication. The director is to make an initial decision regarding whether to proceed with the application.

- Applicants shall be advised by the CVO Director that, in the event they receive a negative decision from the CVO, they may have recourse to the Provincial Minister.
- If the applicant and the CVO Director agree to proceed, they shall jointly discern the appropriate level of formation for which to apply.
- The applicant must make application for (re)admission to a standing or ad hoc admissions board for the desired level of formation.
- The admissions board may recommend, and/or the Provincial Minister may decide to accept the applicant for an earlier program than to that to which the applicant has applied. (Example: Although the applicant has applied for the novitiate, he may be recommended and/or accepted for postulancy.)

Applicants with Children

The Province of St. Joseph does not accept candidates with minor or adult children.

The Vocation Office

Psychological Testing and Behavioral Assessments

A psychological testing report that includes a psycho-sexual history and a behavioral assessment report are required for each applicant to the Postulancy Program. Psychological testing reports and behavioral assessment reports executed for the purposes of admission to postulancy shall be retained in a person's initial formation file until that person professes perpetual vows; and at that time the reports will be destroyed by the Director of Post-Novitiate Formation. A paper noting that the reports were generated, by whom they were generated, the purpose for which they were generated, and the reason for which they were destroyed shall be composed by the same Post-Novitiate Formation Director and placed in the individual's file.

Upon the individual's request and with his written and signed consent, these reports may be released to a counselor. (The Provincial Council approved an early form of this policy in the spring of 2001 with the then collaborating Provincial Councils. It was amended by the SJP PC in its minutes of 12-13 March 2008. Procedure #1 of "Personal Formation Files" outlines the process for removing testing results from formation files. Ordinarily, the Post-Novitiate Director executes these directives.)

Criminal Records Check

The Capuchin Vocation Office shall conduct a criminal record check 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 to the extent that they substantially relate to criteria for admission.

The Candidacy Program

Candidate Living Arrangements

There is no special or necessary place in which candidates must live to participate in the Candidacy Program.

Candidacy Required

The Candidacy Program is required for all men seeking admission to our Capuchin way of life in the Province of St. Joseph.

Entrance Requirements

To enter the Candidacy Program an applicant must possess a high school diploma or GED certificate and be no less than eighteen (18) and no more than fifty (50) years of age. Exceptions to this policy must be approved by the Formation Council.

Admission of Men with Children

The Province of St. Joseph does not accept men with minor children (i.e. those under age 18) into its formation program. The province may accept men with adult children into its formation program on a case-by-case basis upon the recommendation of the Formation Council and the approval of the Provincial Minister.

The Capuchin College Program (CCP)

[Editor's Note: This section was reorganized and eliminated references to the St. Joseph Seminary program, Chicago. It may need additional revisions to properly reflect the proposed program for SLS grads at Marian University, Fond du Lac.]

The Capuchin College Program (CCP) is a two-year program that commences immediately after high school graduation. After two years, those continuing in Capuchin formation shall apply to the Postulancy Program or the non-residential Candidacy Program. Men one year past high school graduation may apply to the CCP and participate in the program for one year. Men two years or more beyond high school graduation will not be accepted into the CCP and will instead be encouraged to apply to the Postulancy Program or the non-residential Candidacy Program.

It is the responsibility of the Capuchin College Program Council (CCPC) to recommend policies regarding the CCP to the SJP Provincial Council (PC) and to establish procedures to be implemented by the CCP staff. Membership of the CCPC shall be: Provincial Director of Initial Formation (PDIF, Chair), CVO Director, the Rector of St. Lawrence Seminary, one appointee from the faculty or staff of St. Lawrence Seminary, one friar of the province not involved in SLS or Initial Formation ministry, and the liaison from the Provincial Council who is also the normal channel of communication and consultation between the PC and the CCP.

SJP shall provide a \$1,000.00 scholarship per semester to participants in the CCP.

The Director of Initial Formation, with good cause and the support of at least one director of the CCP, may grant an extension to participate in the CCP for one additional year, ending with the third year after high school graduation, but no longer. If an extension is granted, the student receives the normal scholarships and need-based grant from the province for that one additional year only (PC approved this policy 3 March 2005).

The Postulancy Program

Capuchin Constitutions

Postulancy is a period of initial formation and of choice of our life. During this period the candidate comes to know our life while the fraternity, on its part, comes to know the candidate better and can discern his vocation. The formation of the postulants includes completing their catechesis in the faith, an introduction to the liturgy, methods of prayer, Franciscan instruction and a first experience of apostolic work. It is also designed to develop and test their maturity, especially their emotional maturity, and their ability to discern the signs of the times in the light of the gospel (See *Constitutions* 30:2).

Admission to Postulancy

Admission to the Postulancy Program is the decision of the Provincial Minister upon the advice of the Postulancy Admissions Advisory Board.

Length of Postulancy

Normally, Postulancy is one year in length. The recommendation of the directors and approval of the Provincial Minister are required for an extension of that time.

Record of Admission

A document shall be drawn up to record the beginning of the postulancy.

Postulancy Location

One friary shall be designated for the postulancy program and will be in a sociologically challenging environment that can facilitate religious experiences of powerlessness and dependence on God. As far as possible, these experiences will be aided by regular interaction with people who are poor so that each postulant may also realize his own poverty. Provision shall be made for proper preparation for and reflection on these experiences.

Educational Loan Policy

The Province of St. Joseph assumes full financial responsibility for postulants, according to the normal provincial policies. The province will also assume the educational loans of applicants to its Postulancy Program on a case-by-case basis. The province will not assume non-educational debt, (e.g., medical, property, consumer, unsatisfied legal judgments, etc.). The following criteria apply:

- (1) The Provincial Minister decides which loans will be assumed.
- (2) The applicant must complete an "Affidavit as to debts and other financial obligations of applicants prior to admission" form (cf. IX:C:4) to be reviewed by the Provincial Minister before the admission meeting to postulancy.
- (3) 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 prior to beginning the program. 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.
- (4) 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 or when the individual holding the loan leaves the Order for any reason, whichever comes first.
- (5) 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 and the individual will assume responsibility to make all remaining payments. The Province of St. Joseph will retain no obligation to make any additional payments on the loan.

The Novitiate Program

Note: The following apply to any novitiate program in which the province participates, including the North American Pacific Capuchin Conference (NAPCC) Novitiate.

Admission Decision

Admission to novitiate is the decision of the Provincial Minister upon consultation with the Provincial Council and the recommendations of the Novitiate Admissions Advisory Board (See Constitutions 20) (Ed.'s note: normally, the Provincial Minister uses his postulancy staff as the Novitiate Admissions Advisory Board. The staff's evaluations normally constitute this advice. If the Provincial Minister desires additional advice, he may always seek it.)

Length of Novitiate

To be valid, the novitiate must comprise twelve months which are spent in the novitiate community itself, at a time and in a manner to be determined by the Provincial Minister with the consent of the Provincial Council and everything required by law shall be observed (Constitutions 31:6).

Record of Admission

A document shall be drawn up as a record of the beginning of the novitiate whereby life in the order itself is begun. (Constitutions 31:2)

Constitutions 31

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

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

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

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

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

To be valid, the novitiate must comprise twelve months spent in the novitiate community itself. The minister, with the consent of his council, determines when it begins and how it is conducted.

An absence from the novitiate house that exceeds three months, either continuous or intermittent, renders the novitiate invalid. An absence that exceeds fifteen days must be made up. All the other requirements of universal law in respect of the novitiate must be diligently observed.

Financial Responsibility for Novices

The province assumes complete financial responsibility for its novices, according to the normal provincial policies.

Process for First Profession

The novices will be evaluated three times during the novitiate year. Each evaluation will include input from the novices themselves (self-evaluations), their fellow novices (peer evaluations), and the novitiate staff and other professed members of the novitiate community. Following the third and final evaluation, the perpetually professed friars of the novitiate community will conduct a vote on whether to recommend each novice for first profession. These recommendations will be communicated in writing to the Provincial Minister.

After the third evaluation is complete and all documentation sent to the provinces, each novice will then write a letter on novitiate letterhead to the Provincial Minister to request admission to temporary vows. The following points are to be addressed by all candidates requesting temporary profession:

- (1) The letter is addressed to the provincial minister by name and asks him for admission to temporary vows.
- (2) The letter addresses briefly the novices' understanding of the seriousness of the commitment he is about to make, and his understanding of the vowed life, as well as the characteristics of Capuchin life: fraternity, contemplative prayer, service to the poor, work, and penance.
- (3) The letter may state briefly why the individual novice believes himself called to commit his life to the Lord as a Capuchin Franciscan friar.
- (4) The letter must clearly indicate that the novice is making his request for vows freely, voluntarily, and without any fear or pressure from any source.

Each novice will submit this letter to his formation advisor for review prior to sending it to his Provincial Minister, especially to assure that it is in compliance with all canonical requirements. Once the final letter is completed, a copy is placed in the novice's formation file.

Acceptance by Provincial Minister

The Provincial Minister, with the consent of his council, decides whether to admit a novice for first profession (Constitutions 20:2). A novice is officially approved for profession when such acceptance is communicated by the Provincial Minister to the novice and novitiate staff. As far as possible, travel arrangements for the end of novitiate should not be made before this acceptance is official.

The Post-Novitiate Program

Post-Novitiate and Ministry Formation

Post-Novitiate Formation within these policies refers to the formation of friars in temporary or simple vows. Ministry Formation refers to any ministerial preparation or education program begun while in temporary vows that continues after a friar's perpetual profession. It also refers to presbyteral formation begun or continued after perpetual profession.

Residence

Friars participating in post-novitiate formation ordinarily live in the post-novitiate community, which is currently based in Chicago, Illinois. The post-novitiate staff provides a program designed to strengthen one's identity as a Capuchin friar. With the discretion of the post-novitiate staff, friars in post-novitiate formation may reside outside Chicago to achieve a specific formational goal (e.g., cross-cultural competency, Franciscan education, summer and other ministry experiences, or Clinical Pastoral Education). Experiences lasting more than a summer or outside the USA require the approval of the Provincial Minister in consultation with his council. Friars who live outside the post-novitiate community will need to reside two successive academic semesters in the post-novitiate community immediately prior to perpetual profession. This will help to ensure adequate reflection on those outside experiences and allow for peer and staff evaluation.

Participation

The friar in post-novitiate formation must allow for full participation in the Initial Formation Program. The post-novitiate staff may limit academic and personal pursuits of friars in initial formation to ensure full participation in the required elements of the program.

Requirements

Before perpetual profession, each friar in initial formation must demonstrate verifiable ministerial competency or a bachelor's degree. In addition, each friar in initial formation shall complete the subject areas and experiences outlined in the Initial Formation Handbook.

Process for Perpetual Profession

A friar in temporary vows who anticipates making perpetual vows must declare his intent at the time of renewal of vows and one year prior to his anticipated perpetual profession. Ordinarily this declaration, discerned with the post novitiate staff, is made after at least three years in temporary profession. The post-novitiate staff shall design and publish a program of discernment for this purpose, which the simply professed friar must complete before his perpetual profession is approved. This year of proximate discernment begins with a discernment retreat planned with the formation staff. The content of the formation advising meetings and evaluations during the year will address discernment of perpetual profession.

An interview with the Provincial Minister and Council will be scheduled during the early part of this discernment year. The candidate and post-novitiate staff will provide material to assist the Provincial Minister and Council in determining the candidate's readiness for perpetual profession. Later in the year the candidate formally requests the Provincial Minister's permission to profess perpetual vows, with the consent of his council (Constitutions 20:2)

Unfinished Degrees Started During Post-Novitiate

A friar engaged in any degree program that is not completed upon proferring perpetual vows automatically enters the Ministry Formation Program following profession.

Cross-Cultural and Language-for-Ministry Plan

Each friar in post-novitiate and ministry formation is encouraged to develop a plan to achieve his competencies in cross-cultural and/or languages other than English. Work on this plan may begin when the post-novitiate director visits the novices to plan their academic futures. These friars should review their plans annually with the post-novitiate and ministry formation directors. How they implemented their plans should be part of the final evaluation each year (PC 12-14 May 2015).

Undergraduate Studies

The following are the normal undergraduate schools of enrollment for friars in post-novitiate and ministry formation in Chicago: St. Xavier University, University of Illinois-Chicago, City Colleges of Chicago. The primary reasons are to ensure an adequate yet affordable undergraduate education while conserving the province's resources for the additional graduate educations provided to friars in post-novitiate and ministry formation. This policy also reflects our vow of poverty, including the maxim, "the minimum necessary, not the maximum allowed" (PC 13 July 2016).

Our Seminary

Our seminary for theological education leading to presbyteral ordination is Catholic Theological Union (CTU) in Chicago (PC 17 March 2015).

Ministry Formation Policies for Those Seeking Ordination

Candidacy

Friars considering presbyteral ordination must request in writing permission from the Provincial Minister to study in the ordination track at the beginning of their program of studies. At the point of Candidacy, the form provided by CTU shall be executed with the proper signatures.

Reception of the Ministries of Lector and Acolyte

The Provincial Minister normally institutes candidates for ordained ministry in the ministries of lector and acolyte (cf. CIC 1035). A written request by the candidate is made to the Provincial Minister. Liturgical institution in the ministries of Lector and Acolyte by the Provincial Minister or his delegate is scheduled and celebrated noting the proper intervals. In cases where institution in the ministry is to be delegated, the Provincial Minister will convey his approval and delegation in writing. A record of institution in the respective ministries is to be kept in the provincial and formation files.

Approval for Ordination

The Provincial Minister and Council grant consent for diaconal and presbyteral ordination (Constitutions 39:4). A written request is made by the friar and written response is given by the Provincial Minister and Council, following the canonical requirements concerning preliminary inquiry and gathering of documentation. Approval for the transitional diaconate presumes that the candidate has also been found suitable for presbyteral ordination, though the latter may be delayed or suspended for serious reasons.

Transitional Diaconate Ministry Sites

Ministry formation is oriented to the ministries in the Province of St. Joseph. Therefore, ministry and formation in the diaconate will normally occur in the parishes and ministries of the province. Service in another community (e.g., a diocesan parish, campus ministry) may be granted at the discretion of the Director of Ministry Formation and with the approval of the Provincial Minister. Deacons are to live in a Capuchin community. Their supervisors will ordinarily be fellow Capuchins, depending on the ministry site.

Permanent Diaconate

Ordinarily, the province does not sponsor individuals for the permanent diaconate, which requires the approval of the General Minister and his Council and the Holy See (Ordinances 2/19).

Responsibilities of a Friar in Ministry Formation for the Presbyterate

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, and to have recourse to whatever other means are appropriate to the development of this vocation. It is the responsibility of the friar engaged in formation for ordained ministry to make available to the Director of Ministry Formation all evaluative records obtained while in the program, such as academic grades, field education evaluations, evaluations of internship for priesthood, and community evaluations by the local Capuchin community.

Degree and Certificate Requirements

All degree or certificate requirements of the respective school or institution should ordinarily be met prior to presbyteral ordination. Diaconate is considered a full-time ministry, therefore only a limited amount of academic work, if any, can be accomplished while serving as a deacon. Exceptions (e.g., for minimal part-time study) may be made at the discretion of the Ministry Formation Director, with the consent of the Provincial Director of Initial Formation and the Formation Council.

Responsibilities of the Directors of Post-Novitiate and Ministry Formation

In accord with the norms laid down by the Church and our Constitutions (37, 40), the directors of post-novitiate and ministry formation oversee: vocational discernment; general pursuit of charismatic, human, spiritual, intellectual, and pastoral/missionary formation; ministry experiences; and preparation for ordination. They work in collaboration with the individual friar, the PDIF and Formation Council, and the Provincial Minister and Council. It is the responsibility of the directors 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.

During the time of an individual's participation in the Post-Novitiate Program, files must be maintained by the staff in accordance with the Provincial File Retention Policy.

Should a friar in initial formation leave the program, an exit report is to be created and signed for the permanent file retained by the province.

List of Required Provincial Permissions

The following requests are required and must be made in writing to the Provincial Minister as signed hard copies:

Requests for vows: first, renewals and perpetual (incl. year of discernment)

Requests to pursue academic degrees

Requests for overseas experiences

Requests for candidacy for orders

Requests for ministries of Lector and Acolyte

Requests for diaconal and presbyteral ordination

###

Job Descriptions

Initial Formation Council: Job Description

Provincial Mission Statement: *Transforming the World Through Reverence*

Inspired by the gospel of Jesus and the example of Francis of Assisi, the Capuchin friars of the Province of Saint Joseph, together with our partners in ministry, prayerfully build sister-brotherhood in the world. We attend simply and directly to the spiritual and other basic human needs, especially those of the poor and disenfranchised, promoting justice for all (Provincial Mission Statement 2008).

(Policy Level with revisions per the direction of Judy Gilleran-22 Sept. 2010)

FC Mission Statement

The Initial Formation Council (FC) establishes procedures and reviews program practices guiding initial and ministry formation in the Province of St. Joseph. It ensures that the province's policies affecting initial formation are implemented. Additionally, it serves as a vehicle of communication between those engaged in the ministry of initial, continuing, and presbyteral formation, and the Provincial Minister and Council.

Membership

The Formation Council is composed of the following members*:

- CVO Director
- Postulancy staff
- Novitiate staff (if a member of the Province of St. Joseph)
- Post-novitiate/ministry formation staff
- Provincial director of initial formation
- Provincial Council liaison
- Provincial Council appointee(s)

*Because all members of the Formation Council (except for the Provincial Council liaison and appointments) are *ex-officio*, there are no stipulated terms of service.

Formation Council Responsibilities

- Review the FC's mission statement and to recommend changes.
- Provide advice and recommend initial and ministry formation policies to the Provincial Minister and Council.
- Implement policies governing the initial and ministry formation programs.
- Create procedures for the initial and ministry formation programs.
- Serve as a vehicle of consultation regarding the progress and development of the men in our programs of initial and ministry formation.
- Serve as a vehicle of conversation and exploration regarding further collaborative initiatives in the realm of initial and ministry formation.

Meetings

The FC meets as needed and when convened by the Provincial Director of Initial Formation.

Minutes

A copy of the minutes shall be forwarded by the liaison to the Provincial Minister's Administrative Assistant for inclusion with materials for the next scheduled Provincial Council meeting. Following PC approval, the minutes are then sent to the Provincial Archives.

Provincial Director of Initial Formation: Job Description

(Policy Level)

Staff to Provincial Minister

- The Provincial Director of Initial Formation (PDIF) is a staff person to the Provincial Minister and is appointed by him for a three-year term beginning at each provincial chapter.
- He reports regularly to the Provincial Minister and Council on matters concerning initial formation. He makes known to the Provincial Minister and Council personnel needs and qualification requirements for members of the Formation Council.
- He performs tasks assigned to him by the Provincial Minister.
- He is the liaison between the Formation Council and other groups and individuals within the province in matters concerning initial formation. He ensures that there is adequate communication to the province-at-large concerning matters relating to initial formation.

Leadership of Formation Council

The Provincial Director of Initial Formation

- Reports to the Formation Council questions, concerns, directives and other instructions from the Provincial Minister and Council. This task will be coordinated with the PC's liaison to the Formation Council.
- Serves as *ex officio* Chair of the Formation Council which oversees the implementation and development of the Initial Formation Program.
- Chairs meetings of the Formation Council and sees to it that accurate minutes are kept and submitted to the Formation Council for correction and approval.
- Performs tasks assigned him by the Formation Council.
- Ensures the continual updating of copies of the Initial Formation Handbook per the decisions of the Provincial Minister and Council and of the Formation Council.
- Serves as the province's contact person with the other provinces of the North American Pacific Capuchin Conference (NAPCC) in matters concerning initial formation.
- Represents the Province of St. Joseph at and attends meetings of the Provincial Directors of Initial Formation (PDIFs) of the NAPCC.
- Performs tasks assigned him by the PDIFs of the NAPCC.
- Informs the Provincial Minister and Council and the Formation Council regarding matters of importance coming from the PDIFs of the NAPCC.

Recourse re: Candidacy Admission and Dismissal

In the case of an unfavorable decision concerning admission to or dismissal from the Candidacy Program, the applicant may seek recourse, within one month of notification of dismissal, to the PDIF. If the PDIF is also a Candidacy Program staff member, then

the Formation Council shall appoint a member to shall handle the recourse process. The decision of the PDIF or designated person is final.

*This job description was originally approved by the Provincial Minister and his Council in August 1987.
Its language was brought up to date on 31 May 2004.*

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Postulancy Admissions Advisory Board Policies

The Postulancy Admissions Advisory Board consists of the Provincial Ministers of the Province of St. Joseph (SJP) and Mary Mother of the Good Shepherd (MMGSP), the postulancy staff, the SJP Provincial Director of Initial Formation and one member appointed by MMGSP Provincial Minister. The advisory board considers all applications made to the Postulancy Program from both provinces and makes recommendations to their respective provincial ministers. If MMGSP does not participate in any given meeting, the SJP Provincial Minister shall appoint an additional member for that meeting. This appointee normally should not be a vocation director from either province.

The Provinces of St. Mary and the Stigmata of St. Francis of Assisi participate in the collaborative Postulancy Program with the SJP and MMGSP. However, each has its own postulancy admissions advisory body.

Required Contents of File for Admission to Postulancy

- Detailed report, evaluation, and recommendation from the vocation director(s).
- Psychological evaluation report that contains a psycho-sexual history, a behavioral assessment report, and criminal background reports.
- Other documents: medical reports and examinations; indebtedness forms; letters of recommendation; pertinent historical information.

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Initial Formation Curriculum

(Procedural Level)

The following topics and tools treated as input or experiences at the designated levels of formation. The directors of the corresponding programs must provide these inputs and experiences or arrange for others to do so. This list reflects in part the NAPCC formation curriculum approved in spring 2012. Where the PDIFs have suggested the number of classroom hours for a topic, it is indicated in parenthesis. The NAPCC has clarified that these classroom hours are only suggestions to give formators a sense of their priority. The entire NAPCC formation curriculum can be found at NAPCC.net. This curriculum includes more than the NAPCC as some requirements come from the SJP FC.

Postulancy Program Curriculum (FC updated 16 March 2012)

- Intro. to Rule of St. Francis and the Capuchin Constitutions (6 hours)
- Intro. Spiritual Direction
- Intro. Personal Prayer—Methods (6 hours)
- Catechesis that includes:
 - The Creed
 - Sacraments
 - Life in Christ—Ten Commandments
 - Christian Prayer
- Intro. Key Documents of Vatican II
 - Dogmatic Constitution on Divine Revelation (*Dei Verbum*)
 - Dogmatic Constitution on the Church (*Lumen Gentium*)
 - Constitution on the Sacred Liturgy (*Sacrosanctum Concilium*)
 - Pastoral Constitution on the Church in the Modern World (*Gaudium et Spes*)
- Symbol, Ritual and Sacramentality
- Liturgy of the Hours
 - General Instruction of the Liturgy of the Hours
 - Intro. History and Theology of the Liturgy of the Hours
 - Planning and Leading (hands-on experience using Breviary)
- Eucharist
 - Historical and Theological Approaches
 - General Instruction on the Roman Missal (GIRM)
 - Planning
- Sacraments of Initiation
- Intro. to Bible
- ○ Intro. to Psalms
- Life and Writings of St. Francis (historical critical method)
- Franciscan Spirituality (8 classes that can include JPIC, minority, poverty, fraternity, etc.)
- Provincial history
- Intro. History of Spirituality (12 hours)
- Intro. History of Religious Life (6 hours)
- Substance abuse, detection, treatment and recovery
- Social Encyclicals and Teaching of the Church

- Provincial Policies and Procedures (5 hours)
 - Sexual Misconduct with Minors and Vulnerable Adults
 - Sexual Misconduct with Adults
 - Code of Professional Responsibility
 - Boundaries in Ministry
- Completion of *Safeguarding All of God's Children* or its equivalent in the Archdiocese of Milwaukee
- Human Sexuality and Celibate Chastity (min. 12 hours)
- Intro. to Concepts of Culture
- The Enneagram
- Mission, Vision and Values of the Capuchin Province of St. Joseph
- Monthly Formation Advising Meetings
- Semiannual Evaluations
- Group Reflection on Ministry (can be combined with monthly reflection/integration experiences)
- Monthly Reflection/Integration Experiences (see suggestion sheet from PDIFs at NAPCC.net) (one monthly)
- Regular Ministry/Apostolate (15-20 hrs. per week)
- Retreat + Days of Recollection
- Monthly Spiritual Direction

The Novitiate Program

The novitiate curriculum is determined by its NAPCC governing body. It can be accessed online at:

http://napcc.net/images/uploads/documents/2012_03_NAPCC_Foreign_Curriculum.pdf

The Post-Novitiate Program (FC updated 16 March 2012)

Capuchin formation is achieved in a mix of community, ministry and educational elements that have individual and group dimensions. The following list of educational requirements is intended to provide a *minimum* set of expectations for individuals desiring to enter Capuchin life and ministry. Fulfillment of these requirements is always viewed in a balanced relationship to the other components of Capuchin formation.

1. At any time in a friar's life before perpetual vows, he must have exposure to each of the educational areas listed here. Unless otherwise noted, that exposure will be equivalent to or exceed a 3-credit hour undergraduate course. Courses may be audited or taken for credit. Course selection requires the assessment and approval of the post-novitiate directors.

- Introduction to Theology
- Introduction to Hebrew Scriptures (Old Testament)
- Introduction to Christian Scriptures (New Testament)
- Christology
- Ecclesiology
- Theology of Eucharist

- Moral Theology
 - Religion and Culture (may be fulfilled in one of the above areas)
 - in a course that addresses the topic in cross cultural context)
 - Professional Responsibility in Ministry (incl. appropriate sexual boundaries)
2. The following educational input or experiences are also required before perpetual profession, but are not regulated by the equivalency of a 3 cr. Undergraduate course:
- Integrating seminars that, on a rotating basis, include the themes of healthy psychosexual development in a chaste celibate setting, obedience, poverty, prayer, cross cultural learning, the Mission, Vision and Values of the Capuchin Province of St. Joseph and other topics. Other suitable areas may also be included.
 - Summer Capuchin experiences (living and ministering in Capuchin sites throughout the province)
 - Regular Theological Reflection
 - Regular Input Sessions – Topics may be drawn from a variety of fields: Theology; Franciscan Studies; Human Development; Sexuality; Capuchin Constitutions; Justice, Peace and the Integrity of Creation (JPIC), etc.
3. Beyond the required curriculum and experiential requirements listed above, men in temporary vows are strongly encouraged to engage in the following:
- Clinical Pastoral Education (CPE) or a similar experience that includes regular evaluation, self-examination and self-disclosure about the friar's relative strengths and weaknesses in ministry, along with a plan for further development or improvement.
 - Language training with an emphasis on Spanish. Consideration may also be given to Italian to participate in world-wide Capuchin events and to the language of one's ancestors, e.g., Vietnamese, Malayalam, Arabic, etc.
 - Extended cross-cultural experiences

Ministry Formation Procedures

A written plan to accomplish all degree requirements is to be completed by friars entering the Ministry Formation Program. This plan shall be updated annually. Periodic meetings with the Ministry Formation Director, community and ministry evaluations will be scheduled as part of the ministry formation program.

Those Seeking Holy Orders

a. Prerequisites

Friars considering ordination shall generally work to complete prerequisite Philosophy courses (30 credit hours) during their post-novitiate academic undergraduate program.

b. Responsibilities

The community evaluation may be concurrent with the scrutiny required for each liturgical ritual (lector, acolyte, deacon and presbyter) that marks the friar's advancement toward the priesthood, providing clear indications regarding his suitability. The friars preparing for ordination are expected to exercise public liturgical roles, including scriptural proclamation, preaching, performing the role of acolyte, and presiding. These experiences will be reviewed and serve to inform the recommendations given at these stages to the Provincial Minister throughout the course of formation.

Life in Temporary Profession

- a. Permission to renew temporary vows is the decision of the Provincial Minister upon the advice of the directors of the Post-Novitiate Program and others the provincial minister may seek out.
- b. Dismissal or dispensation from the obligation of temporary vows requires adherence to the norms of pertinent universal Church law.
- c. Admission to perpetual vows is the decision of the Provincial Minister with the consent of his Council and upon the advice of the directors of the Post-Novitiate Program, members of the local community, and others the Provincial Minister may consult (Const. 20:2, 34:3, 4).

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Entrance Requirements for Catholic Theological Union (Information Notice)

The following are the entrance requirements for the M. Div. program (Ordination Track) at Catholic Theological Union, Chicago. These requirements are not those of the Initial Formation Program but are offered here as information for those who need them for planning purposes.

- A bachelor's degree, preferably in liberal arts
- 30 semester hours in philosophy, with recommended are courses in:
 - Major historical periods
 - Epistemology
 - Philosophical Anthropology
 - Metaphysics
- 12 semester hrs. undergraduate Theology for the M.Div; 18 sem. hrs. for the MA.
(The Admission's Committee may accept a novitiate experience as an equivalency.)

The M.Div. (Lay Ecclesial Minister Track) requires 9 cr. hrs. in Philosophy as a prerequisite and no Theology.

Those who are considering entrance in a CTU M.A. program are further encouraged to gain credits in the following areas:

- Classical roots of the individual's culture
- Latin and Greek
- Speech and communication skills

Those who are considering the M.A. in a specific area of concentration must demonstrate a reading competence in the following languages:

- For all areas: one modern language (usually French or German)
- For Historical Theology: Latin
- For Scripture--Greek and Hebrew

Applications to CTU must be completed at least 3 weeks before the term begins.

###

Personal Formation Files

General Procedures

The following procedures apply to *all* levels of formation:

- When reports from psychological testing or behavior assessments are removed from an individual's initial formation file, the director removing the report should insert into the file a page providing the following information:
 - Name of person about whom the report is written
 - Type of document removed (e.g., psychological testing report, behavioral assessment report)
 - Name of person who generated the report (e.g., Dr. XYZ, Psychologist)
 - Original date of the document being removed (not to be confused with the date on which the document is removed)
 - Reason for which the document was generated (e.g., admissions process)
 - Reason for which the document is removed (e.g., provincial policy not to keep psychological testing reports after perpetual profession.)
 - Date on which the document is being removed and by whom
 - One of the following paragraphs:
 - "Nothing in this report about <name> provided any sign of addictive behavior regarding alcohol or drugs, nor misconduct in relationship with members of his own sex or the opposite sex, nor with minor children and adolescents."
 - "Nothing in this report about <name> indicated he had an untreated alcohol or substance abuse problem at the time the report was generated. Nothing in this report provided any sign of misconduct in relationship with members of his own sex or the opposite sex, nor with minor children and adolescents."
 - The dated signature of the person removing the report

This directive is not intended to hide or fail to disclose important information. If you cannot write one of these paragraphs in truth, you need to contact the Provincial Minister about how to proceed legally and ethically.

Staff evaluations of friars still in initial formation should not include more than a summary of peer evaluations. Staff should not insert peer evaluations into personal formation files. Formation files are open to the individual involved, all current formation staff, the Provincial Minister, persons designated by the Provincial Minister and, at the time of admission, members of the Provincial Admissions Advisory Board.

All materials entered into the files remain in the file until perpetual profession. After admission to Postulancy, the Postulant Director may remove memos from vocation directors and other incidental documents that are not among the list of documents required for an admission to postulancy. All other documents should be retained. Psychological testing and behavioral assessment reports are removed at the time of perpetual profession by the director of Post-Novitiate. (Policy 12 under the Candidacy Program directs how to document this removal.) Any correspondence deemed relevant by formation staff may be entered into a formation file. Correspondence from the Provincial Minister regarding an individual in initial formation, and sent to formation staff, should be entered into the individual's formation file. This includes routine letters of acceptance, transfer, and renewal.

At any point during initial formation, a written summary of significant meetings, agreements, or understanding regarding an individual in formation may be included in his file. Such written summaries must be shared with the individual involved. The individual in formation should sign such a summary, indicating that he has seen it, but not necessarily that he agrees with it.

An individual may enter into his own formation file a written clarification of any other material which is contained in his file.

Upon departure from our Initial Formation Program, an individual's entire formation file is handed over to, and retained by, one of the two following offices:

- The Capuchin Vocation Office, in cases prior to the commencement of the Postulancy Program. Files of departing inquirers are retained until the maximum age of application permitted by policy or procedure.
- The Provincial Archives, in cases after the commencement of the Postulancy Program. These files are retained until death is confirmed or can be presumed.

Upon the departure of an individual in formation, the director of the relevant formation program shall enter into the formation file an explanation of the reasons for and circumstances of the departure.

Procedures for the Candidacy Program

- During the process of admission, the formation file is to include a summary of an initial interview with a director of the Capuchin Vocation Office (CVO) or his delegate.
- During the time of the individual's participation in the Candidacy Program, the formation file is to include any correspondence deemed relevant by the staff.

Procedures for the Postulancy Program

During the process of admission, the applicant's formation file is to include all the following:

- Completed application form to Capuchin formation
- Written evaluation/recommendation from the director(s) of the CVO, including the applicant's contact friar in cases of resident candidacy
- Five (5) references, including three (3) documented personal references (at least one from a family member) and two professional references (at least one from a person involved in church ministry)
- Completed health history/medical examination form
- Completed questionnaire regarding indebtedness
- If the individual does not have a bachelor's degree
 - High school transcripts
 - SAT/ACT scores
- All college transcripts
- Written recommendation from the Director of the CVO
- Certificates of Baptism and Confirmation (must have been issued within the previous six months)
- Behavioral assessment report from the CVO Director or his delegate
- Psychological testing report (must include a psycho-sexual history)
- Criminal background check

During the time of the individual's participation in the Postulancy Program, the following should be included in the postulant's file:

- All church and civil legal and financial forms;
- All written self, staff, ministry and community evaluations done during postulancy; and
- Certificate verifying completion of a child protection training program (e.g., VIRTUS, Praesidium or equivalent)

NAPCC Novitiate Program

During the admissions process, the following item is to be included in the individual's formation file:

- A letter from the applicant requesting entrance into the Novitiate and stating reasons for this request. This letter should be addressed and sent to the Provincial Minister, with a copy sent to the Director of the Postulancy Program.

During the time of the individual's participation in the Novitiate Program, the friar's file should include:

- All self, community, ministry and staff evaluations and recommendations written during novitiate; and
- All church and civil legal and financial forms.

The NAPCC Novitiate will request that a limited number of documents (e.g., photocopies of driver's license and proof of health insurance, postulancy team evaluation(s), completed novice information form, copy of letter of acceptance to novitiate) be sent to the Director of Novices. These will be included in the novice's file, along with evaluations and other documents. Upon his completion or departure from the novitiate, the novice's file will be sent to his PDIF and the materials therein (except for duplicates of existing documents) will be included in his formation file.

Post-Novitiate Program

During the time of a friar's participation in the Post-Novitiate Program, the following items are to be included in his formation file:

- All evaluations written by ministry supervisors, local communities and directors of the Post-Novitiate Program, and all self-evaluations;
- Updated academic transcripts;
- Copies of the documents of renewal of vows; and
- All church and civil legal and financial forms.

General Procedures Regarding Evaluations

(Procedural Level)

During each year, the men who are in the Postulancy, Novitiate, and Post-Novitiate programs shall be evaluated.

Copies of all written evaluations put in the individual's formation file should be given to the individual involved.

From Postulancy on, the evaluations shall include the points of view of the staff, the community, the supervisor in ministry, and the individual himself.

Areas of concern in the evaluation process at all levels should include:

- Community life

- Prayer life
- Personal values manifested in external behavior
- Health
- Social life
- Participation in the formation program
- Personality shifts
- Vocational discernment
- Personal industry and initiative
- Ministry and wider church involvement
- Academic and skills development
- Faith development
- Cross-cultural development

Evaluations by the formation staff should be written with the intention of indicating patterns and history.

Staff of each level shall annually make recommendations regarding admission to or continuation in the Initial Formation program.

The Post-Novitiate staff shall make recommendations regarding requests for renewal of vows and for perpetual vows.

###

Recourse Procedures

(Procedural Level)

Candidates

Admission to and dismissal from the Candidacy Program of initial formation is determined by the Director of the Capuchin Vocation Office. In the event of an unfavorable decision by the directors of the Capuchin Vocation Office regarding admission to or dismissal from the Candidacy Program, the applicant may seek recourse within one month of notification, to the PDIF. Such an appeal must be made in writing. The decision of the PDIF is final. There is no recourse to the Provincial Minister at this level.

Should the PDIF be involved in the unfavorable decision (e.g., if he is also the PDIF), the Formation Council shall designate another person to deal with the recourse petition. Applicants and candidates should be informed of this opportunity for recourse should they request such information.

Postulants

Admission to the Postulancy Program is the decision of the Provincial Minister upon the advice of the Postulancy Admissions Advisory Board. There is no recourse beyond the Provincial Minister.

The Provincial Minister and, by special mandate, others delegated by the Provincial Minister (see Const. 20:1) have the authority to dismiss a postulant whom they judge unfit for our life (Const. 36:1).

When there is a serious reason which permits no delay, the Director of the Postulancy Program has the authority to dismiss a postulant, but only with the consent of the perpetually professed friars in the community. [Editor's note: The former language referred to "the local council."] The Provincial Minister must be informed immediately of this action (Const. 36:2).

In the event of dismissal from the Postulancy Program by the Director, the postulant may seek recourse from the Provincial Minister. This appeal must be done in writing and within two weeks (14 calendar days) of notification of dismissal. Postulants shall be informed of this opportunity for recourse.

If a postulant is dismissed from the Postulancy Program by the Director of the Postulancy Program, he must vacate the premises (house) of the program as ordered by the Postulancy Director. The postulant may return to the premises only if the Provincial Minister reverses the decision of dismissal. There is no appeal beyond the Provincial Minister.

Novices

Admission to novitiate is the decision of the Provincial Minister upon the advice of the Novitiate Admissions Advisory Commission (Const. 20:1-3). For the Province of St. Joseph, this advisory board normally is composed of the postulant directors. The Provincial Minister may

seek advice from others if he desires. There is no recourse beyond the Provincial Minister's decision regarding admission.

The Provincial Minister and, by special mandate, others mentioned in Const. 20:1 have the authority to dismiss a novice whom they judge unfit for our life (Const. 36:1).

When there is a serious reason which allows no delay, the Novice Director has the authority to dismiss a novice, but only with the consent of the perpetually professed friars in the community. [Editor's note: The former language referred to "the local council.] The Provincial Minister must be informed immediately of this action (Const. 36:2).

In the event of dismissal from the Novitiate Program by the Director of Novices, the novice may seek recourse from the Provincial Minister. Such an appeal must be made in writing within two weeks (14 calendar days) of notification of dismissal. Novices should be informed of this opportunity for recourse.

If a novice is dismissed from the novitiate by the director of the Novitiate Program, he must vacate the premises (house) of the program as ordered by the Novitiate Director. The novice may return to the premises only if the Provincial Minister reverses the decision of dismissal. There is no appeal beyond the Provincial Minister.

Admission to first vows is the decision of the Provincial Minister with the consent of the Provincial Council and with the advice of the directors of the Novitiate Program, members of the local community and any others the Provincial Minister may consult (Const. 20:2; 34:2). There is no recourse beyond this decision.

Friars in Temporary Vows

Permission to renew temporary vows is the decision of the Provincial Minister upon the advice of the directors of the Post-Novitiate Program, the Provincial Council and others he may consult.

Dismissal from temporary vows requires adherence to the norms of pertinent universal church law.

Admission to perpetual vows is the decision of the Provincial Minister with the consent of the Provincial Council and upon the advice of the directors of the Post-Novitiate Program, perpetually professed members of the local community and others the Provincial Minister may seek out (Const. 34:3, 5). There is no recourse beyond this decision.

Spiritual Direction: Procedures (Procedural Level)

Spiritual direction is required a minimum of monthly from postulancy to perpetual profession.

At the beginning of each phase of initial formation and whenever a friar in formation changes spiritual director, the staff shall assist him in the selection of a spiritual director. The staff shall

determine whether the proposed spiritual director possesses the qualifications for spiritual directors provided by the Formation Council. Formation personnel may not serve as spiritual director or ordinary confessor for any member of the Province in initial formation.

Criteria for Selecting a Spiritual Director

1. A spiritual director should be able to maintain an interpersonal relationship in which he/she assists others to reflect on their own experiences in the light of who they are called to become in fidelity to the Gospel.
2. Since the hallmark of the director-directee relationship is the person's continuing efforts to pray, it is perhaps even more necessary that directors know what they believe (and do not believe) about prayer. Prayer is, at base, a growing interaction with our own life in and through the Life who is God, an interaction that is always a response to God's initiative.
3. The director should be experienced and maintain a professional spiritual direction relationship.
4. A director should be an active listener, receptive, attentive, and patient.
5. A director should understand that this relationship demands an intense sharing of another's joy, enthusiasm, and desire. It also demands an intense sharing of other's pain, sorrow, anger, and feelings of helplessness.
6. A director should have a familiarity with the history of spirituality, theology and knowledge of the Roman Catholic tradition, especially that of the post-conciliar Church.
7. A director should be skilled in making a referral for psychological or other counseling when appropriate.
8. Spiritual direction is a professional/ministerial relationship; thus, the director will always be attentive to observe appropriate boundaries and the relevant standards for ministry.

Responsibilities of the Formation Staff re: Spiritual Direction

1. A formator may not communicate with a spiritual director about a directee except through the directee and with his consent.
2. A spiritual director may be appropriately compensated for providing services to a friar who is part of our Initial Formation program.

###

Guidelines and Checklist for Departures from Initial Formation

The Chain of Communication

To facilitate the smooth communication of information regarding departures, the directors directly involved will contact the Provincial Minister by phone and all members of the Formation Council by e-mail as soon as possible. When the timing is appropriate, the directors involved will notify the province's internal communication office asking that a notification of departure be posted to members of the province.

Financial Considerations

Many of those currently entering religious life have few financial resources. Many also have educational debts, and most continue working up to the time of admission to be debt-free. Therefore, it does not seem realistic to ask for a deposit upon admission to cover the immediate expenses connected with a possible departure.

Financial assistance at the time of departure will vary depending on the circumstances. It will consider several factors or needs, including health insurance coverage, travel and transportation, housing assistance, support during the transition to employment. It is expected that this assistance will be provided in the form of a gift/grant. However, a loan may be appropriate in limited circumstances.

Possibilities include the following with final determination being made in dialogue between the Provincial Minister and formation staff:

- a. An extension of health insurance coverage and student debt repayment for 90 days from the date of departure from the community, the expiration of vows, or the receipt of an indult of departure. Continuing health insurance coverage will be paid by the Provincialate. Student debt repayment will continue to be paid by Initial Formation, allocating the expense to the line for such repayments. Other financial aid will come out of the account of the level or formation program from which the friar departs (per decision of the Provincial Minister 18 Sept. 2015).
- b. Immediate transportation and housing needs:
 - 1. Transportation home and up to \$500 to be determined by the pertinent formation staff.
 - 2. An additional amount up to \$1700 may be allotted by the Provincial Minister depending on individual need and verification of that need.

###

Formation in Relationships, Sexuality and Chastity

(Procedural Level)

Philosophical and Theological Foundations

"The evangelical counsel of chastity, which we have voluntarily chosen and promised by vow, draws its sole motivation from the preferential love of God and, in Him, of every person. In a unique way, it confers a greater freedom of heart, through which we are able to cling to God with an undivided love and to become all things to all people" (Const.169:5).

As a gift from God, celibate chastity must be accepted, nurtured, and bear fruit that can be shared with others . As part of this endeavor, candidates, postulants and friars are trained to be men of affective and sexual maturity who can make the lifetime journey along "a path of conversion from self-centered and possessive love to one that is self-sacrificing and capable of giving itself to others" (Const. 172:1). Through this integral part of our formation program, we affirm the goodness and sacredness of human sexuality and strive to be men who are holy, healthy, and joyful followers of the gospel of Jesus as lived by Francis of Assisi.

Training to Form Affectively and Sexually Mature Capuchins

- A. GOAL: To train and assist Capuchin formation and vocation directors in their responsibility of forming affective and sexually mature members for the Order.
- B. OBJECTIVES
 - 1. New formators and vocation 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. Such programs may be available through organizations like the St. Luke Institute or schools like Catholic Theological Union.
 - 2. New formators should be able to demonstrate knowledge of and compliance with the provincial policies regarding: (a) sexual misconduct with minors and vulnerable adults; and (b) sexual misconduct with adults. They should also be able to demonstrate knowledge of and compliance with the province's Code of Professional Responsibility. This can be accomplished by reading the policies and/or attending provincial workshops. Further consultation with the Director of the Office of Pastoral Care and Conciliation (OPCC) may also be helpful.

Formation in Relationships, Sexuality and Celibacy of Capuchin Resident Candidates

- A. GOALS
 - 1. To form Capuchin resident candidates in relationships, sexuality and celibacy.

2. To assist a Capuchin resident candidate to discover and develop the spirituality, attitudes, and skills needed to lead a successful life of celibate chastity.

B. OBJECTIVES

1. To participate in the province's screening process to reasonably ensure that the candidate has the age-appropriate psychological and emotional health required to function as affective and sexually mature man in a chaste and celibate way of life in the Capuchin Order. This process currently includes:
 - i. Psychological testing including a psychosexual history.
 - ii. Behavioral assessment.
 - iii. References/recommendations from the candidate's pastor and one other person.
 - iv. Criminal background check.
2. To establish a safe environment for talking about sex and sexuality:
 - a. In the internal forum through spiritual direction and the Sacrament of Penance; and
 - b. In the external forum through meetings with the vocation director.
3. To have the resident candidate participate in the communal life of the friary in which he lives, including prayer, meals, recreation, work, etc. These activities form the basis for determining his readiness to apply for postulancy.

Screening Procedures for Admission to the Postulancy Program

- A. GOAL: To be reasonably sure that men admitted into the Postulancy Program have the abilities and skills needed to live a healthy chaste and celibate life as a Capuchin.

B. OBJECTIVES

1. All applicants will have undergone psychological testing that includes the taking of a psychosexual history.
2. All applicants will have undergone a postulancy admissions or behavioral assessment interview conducted by a trained interviewer. Participation in the introductory workshop on

this technique, conducted by Fr. Ray Carey, Ph.D., is considered sufficient training for the interviewer.

3. Criminal background checks will be conducted on all applicants to postulancy and those requesting to live as resident candidates. Such checks must be completed before the individual moves into a Capuchin community. Criminal convictions or pending charges will be considered in the application process to the extent that they substantially relate to criteria regarding admission. The existence of a credible allegation and/or conviction for any sexual offense involving a minor or vulnerable adult, including child pornography, precludes admission to or continuation in any level of initial formation.
4. All applicants shall secure a total of five recommendations, including three personal references (with at least one from a family member) and two professional references (e.g., from an employer, volunteer supervisor, etc.).
5. All applicants shall be interviewed by at least two Capuchins before the Admissions Advisory Board meeting. The postulancy admissions (behavioral assessment) interview may constitute one of these interviews. All applicants shall have an initial interview with a vocation director before acceptance as a candidate, and this may constitute the second required interview.

Formation in Relationships, Sexuality and Celibacy of Capuchin Postulants

A. GOAL

1. To provide a theological, psychological and moral foundation of sexuality and chaste celibacy.
2. To assist Capuchin postulants to establish the spiritually grounded life needed to deepen their commitment to a life of healthy celibate chastity.

C. OBJECTIVES

1. To establish a safe environment for talking about sex and sexuality:
 - a. In the internal forum through at least monthly spiritual direction meetings as well as in the Sacrament of Penance;
 - b. In the external forum through at least quarterly meetings with formation directors; and
 - c. An annual class-time reflection on the theme of celibate chastity.

2. Postulancy curriculum
 - a. Introduction to internal vs. external forum (Orientation)
 - b. Provincial policies regarding sexual misconduct
 - c. Provincial policies regarding boundaries in ministry
 - d. A workshop with a minimum of eight (8) meeting hours on human sexuality and celibate chastity
 - e. Spiritual direction
 - f. Substance abuse, detection, and treatment
 - g. Family systems and issues for Capuchin community
 - h. Introduction to personal prayer methods
3. To have postulants participate in the communal prayer, faith sharing, and theological reflection of their local Capuchin community.
3. To maintain a small collection of publications on human sexuality and celibate chastity in the provincial postulancy house.

Formation in Relationships, Sexuality and Celibacy of Capuchin Novices

Please refer to the *NAPCC Novitiate Program Handbook*.

Formation in Relationships, Sexuality and Celibacy of Friars in Post-Novitiate Formation

- A. GOALS:
 1. To support and educate friars in Post-Novitiate formation toward healthy affectivity and sexual maturity in the Capuchin Order.
 2. To assist friars in Post-Novitiate formation to establish the spiritually grounded lives necessary to deepen their commitment to a life of healthy celibate chastity.
- B. OBJECTIVES
 1. To establish a safe environment for talking about sex and sexuality:
 - a. In the internal forum through at least monthly spiritual direction meetings as well as the Sacrament of Penance; and
 - b. In the external forum through at least quarterly meetings with formation directors.
 2. To have friars in Post-Novitiate formation participate in the communal prayer, faith sharing, and theological reflection of their local Capuchin communities.

3. To have friars in post-novitiate formation complete all provincial activities required for Praesidium accreditation.
4. To maintain a small collection of publications on human sexuality and celibate chastity in the provincial Post-Novitiate house(s).

Documentation of Compliance

All directors of formation and vocation programs shall be able to document their Programs' compliance with this Formation for Celibacy Program through the Director of the Office for Pastoral Care and Conciliation (OPCC).

DRAFT

THE CANDIDACY PROGRAM

Capuchin Constitutions (Policy Level)

Concern for vocations arise especially from the Brothers' awareness that they give and offer to others a way of life that is very rich in human and gospel qualities. By embracing this life candidates render a genuine service to God and to people and develop their own human qualities. In order that we may give a clear witness to this way of life, we must engage in a continual process of renewal. All the Brothers should work together earnestly to promote vocations from a desire to carry out God's plan in keeping with our charism. Mindful of the concern of St. Francis when he saw the growth of the original fraternity, all the brothers, especially the ministers and the individual fraternities, should assiduously learn to recognize and foster genuine vocations, chiefly by the example of their lives, by prayer and by personal contact. (15)

Better results are obtained where there are brothers specially assigned to promote and coordinate the fostering of vocations. . . . To encourage vocations ,it is very useful to offer young men the opportunity of sharing our fraternal life in some way. This is best done in houses which are suited for this purpose and in which also assistance with personal reflection is offered. (16)

###

Capuchin Vocation Director: Job Description (policy level)

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.

Abilities = native talents/natural endowments of an individual.

Experiences = personal/community/ministerial experience.

- Skills: vocational discernment, recruitment techniques
- Abilities: public relations, willingness to travel
- Experience: works effectively with young people

Serves as a member of the Formation Council and are to participate in its meetings and work with the other members of the council in implementing the initial formation program of the province.

Responsible to the Provincial Minister and 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.

Facilitates the process of ongoing discernment and deepening commitment to Christ and his Church for the candidates and inquirers.

Maintains files on all inquirers and candidates.

Implements all policies and procedures that affect inquirers and candidates, especially regarding the Candidacy Program and the Capuchin College Program.

Ensures the proper execution of civil and ecclesiastical documents affecting candidates, especially those required for an application to postulancy.

Promotes membership in the Province of St. Joseph.

Conducts the processing and initial screening of applicants.

Evaluates applicants' interest in the province.

Assists inquirers and candidates in their discernment.

Prepares candidates to succeed in postulancy;

Elicits the cooperation of others, especially other friars, with the ministry of the Capuchin Vocation Office.

New vocation 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. Vocation 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.

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Procedures for the Vocation Office
(Procedural Level)

When an applicant to the Postulancy Program has previously gone beyond a simple request for information about the formation program of another diocese, seminary, or religious order, the Director of the Capuchin Vocation Office shall secure a written report or create a report of a phone conversation about the circumstances of the applicant's departure from and participation in those programs from the appropriate official. These reports shall be included in a candidate's application file for the Capuchin Postulancy Program.

###

The Capuchin College Program Council
 Transforming the World through Reverence
 (composed by Bill Hugo & reviewed by CCPC members for the Provincialate on 3 September 2010)

Ministry Mission Statement

The Capuchin College Program (CCP) is a residential discernment program directed by the Capuchin Vocation Office (CVO) for men within two years of high school graduation. It is designed to help participants to explore the possibility of a Capuchin vocation and to decide whether they wish to continue in initial formation as a postulant or non-resident candidate. (NB: Capuchin College Program candidates may apply to Postulancy after one year of college.)

The Capuchin College Program Council is advisory to the CVO Director, who directs the Capuchin College Program. Oversight of the CVO and its director remains the responsibility of the Initial Formation Council.

Responsibilities of Ministry Council Members

- Review the CCP's mission statement and to recommend changes.
- Recommend guidelines for CCP membership.
- Recommend CCP membership to the Provincial Council.
- Develop and recommend policies that are unique to the CCP.
- Advise the Capuchin Vocation Directors on matters brought to their attention by the Vocation Directors.
- Advise how best to facilitate the recruitment and entrance of St. Lawrence Seminary (SLS) seniors into the CCP and how best to coordinate practices of the CCP with SLS.

Membership of the CCP includes:

- Provincial Director of Initial Formation, who functions as chair of the CCP (*ex officio*)
- CVO Director (*ex officio*)
- Rector of St. Lawrence Seminary (*ex officio*)
- One appointee from the faculty or staff of St. Lawrence Seminary
- One Capuchin from the province not involved in SLS or initial formation ministry
- Liaison of the Provincial Council who is the normal channel of communication and consultation between the PC and the CCP (*ex officio*)

Terms of Service

The non-ex-officio members of the CCP shall be appointed at the normal time after each provincial chapter.

Meetings

The CCP normally meets twice a year, based on need.

Minutes

A copy of the minutes shall be forwarded by the liaison to the Provincial Minister's Administrative Assistant for inclusion with materials for the next Provincial Council meeting. With approval by the PC, the minutes will then be sent to the Archives.

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Procedures for Resident Candidates at St. Joseph Seminary

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Practices of the Candidacy Program

(Practice Level)

Candidates are expected to make at least four visits to provincial houses before applying for the postulancy program.

RE: Foreign applicants to the Province of St. Joseph:

- Normally, no application from a person living outside the United States who is not a United States citizen or lawful permanent resident will be considered by the Capuchin Vocation Office.
- Applications to the Province of St. Joseph from foreign graduates of St. Lawrence Seminary will be considered if the applicant understands and accepts the following general sequence leading to permanent residency in the United States.
 - While a student is a resident candidate at St. Joseph Seminary in Chicago or another American College/University, the applicant will achieve F-1 (student) status from the Department of Homeland Security – United States Citizenship and Immigration Service (USCIS).
 - After acceptance into postulancy and before the postulancy program begins, with the assistance of the vocation office personnel, the applicant will request and achieve R-1 (non-immigrant religious worker) status from the USCIS.
 - Sometime before the expiration date of the R-1 visa, the applicant, with the assistance of formation staff, will apply for and achieve the status allowing him to continue in Capuchin formation in the USA.
 - The goal is that the individual become a lawful permanent resident of the USA.
 - The decision to apply for USA citizenship is the applicant's decision.
 - Should the applicant discontinue participation in the Capuchin initial formation program for any reason, the Capuchin Province of St. Joseph waives any responsibility to sponsor the former applicant in any way.

The Province accepts undocumented immigrants into Capuchin formation. However, the CVO should proceed with caution when working with such applicants.

Candidates are encouraged to meet regularly with their contact friar and contact community.

Pre-admission and Admission to Candidacy

One or more interviews are conducted by the vocation director. After attending a ministry or discernment weekend, the prospective completes an application form and participates in an

admissions interview (behavioral assessment). The vocation director determines whether an applicant is admitted to the Candidacy Program. Consultation with friars having experience of the applicant is recommended.

Candidates meet regularly with their assigned contact friars 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; and
- Capacity for work/school.

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 (prospective) candidates with the life and ministry of the province. The input for these weekends centers on the developmental tasks appropriate to this level as well as further education on the province, prayer and religious life, in general. Especially important to the Candidacy Program is the sense of fraternity experienced during these weekends.

Resident Candidacy

Through dialogue with his contact friar and the vocation director, a candidate may request to be a resident candidate with a community in the province. The CVO gathers a profile of the needs and goals of the applicant in consultation with the him, his contact friar, and others.

The CVO discusses the possibility of being a resident candidate with a community. A written memorandum of understanding for the candidate and the community will be developed and will include the following elements:

- Length of time;
- Costs for room and board, if any;
- What the community expects of the candidate;
- What the candidate expects from the community;
- What the candidate will do while living within the community (e.g., study, work, ministry, etc.);
- Designation of the contact friar for the candidate (suggest the guardian); and
- The process of evaluation.

If the candidate applies for the Postulancy Program, the same procedures for admission apply as with any other candidate.

The CVO will be in periodic communication with the contact friar/guardian and the candidate. The director will also keep the Formation Council informed.

If problems develop, the guardian will bring the vocation director into the resolution process.

The recommendation of the community in which the candidate is resident will be included in the file of the candidate applying for postulancy.

Preparation for Postulancy Program or Termination of Participation in Candidacy Program

Through dialogue with his contact friar/community and the vocation director, the candidate discerns whether he will apply for postulancy or withdraw from the 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 CVO 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 CVO staff may help the candidate formulate goals for his future.

The CVO 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.

###

THE POSTULANCY PROGRAM

Capuchin Constitutions

The postulancy is the period of initial formation when one makes the affirmative choice to adopt our life and undertakes more careful discernment of our vocation. For its part, the fraternity comes to better know the postulant and ascertains his growth, especially his affective maturity, and his ability to discern his life and the signs of the times according to the gospel. The postulant, therefore, must be helped to deepen his life of faith. To this end, the formation of the postulants is chiefly aimed at completing their catechesis in the Catholic faith, introducing them to our liturgical life, the methods and experience of prayer, study of our Franciscan heritage, life in the brotherhood, and to an initial experience of apostolic work (30).

###

Postulancy Program Directors: Job Description (Procedural Level)

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

Abilities = native talents/natural endowments of an individual.

- Able to assist others in the integration of personal, social, and prayer experience.
- Able to assist others in vocational discernment.

Experiences = personal/community/ministerial experience.

- A variety of Capuchin/ministerial experiences

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 of ministry 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.

###

Postulancy Program Procedures

(Procedural Level)

Postulancy 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. *[Is this the current practice?]* 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.
- 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 prayerful & 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; and
 - 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; and
 - Working collaboratively with persons of various genders and cultures.

Age: To be admitted to postulancy the applicant must be 19 years of age or one year out of high school. Candidates may not apply after the age of 50. 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.

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Postulancy Evaluation Tool (Practice Level)

The following questions are offered as examples of questions an evaluator may consider. Evaluators need not address every question.

COMMUNITY LIFE

1. Initiative in community:

Does this man consistently evidence the ability to recognize household tasks that need attention, or does he need constant direction and guidance on these matters?

In the presence of guests, does he show the ability to be a hospitable presence and does he share in the tasks of providing hospitality?

Does he consistently "volunteer" to pitch in with community projects or does he usually need to be directly asked?

2. Responsibility in community:

Is this man reliable in fulfilling his fraternal responsibilities in a competent and punctual manner?

Does he pull his "fair share" of the daily tasks of community living (e.g.: kitchen clean-up, dishes, answering the phone, keeping public areas presentable, etc.)?

Is he considerate of others in the manner of his presence? Does he relay telephone messages in timely and accurate fashion? Is he flexible and generous in sharing access to community goods (e.g.: cars, TV, etc.)?

3. Communication skills & transparency:

Is this man straightforward in his self-expression or are you often left wondering what he really means to say?

Is he able to take appropriate risks in self-disclosure or do you experience him as unnecessarily secretive?

Can he express himself openly, even when he holds a minority or unpopular position, or does he always wait until his view can be "safely" stated without fear of challenge?

Can he express anger, annoyance or hurt in appropriate and clear ways or do you find yourself wondering just what seems to be eating at him?

Is he able to engage in the playful "give and take" of community life or is he overly sensitive and easily offended? In his use of humor, do you find him playful and affirming or is his humor especially sarcastic, biting and aggressive? Can he poke fun at himself?

Does he demonstrate an awareness of the differences in communication styles that result from the varied cultural influences that have shaped others in the fraternity?

4. Quality of relationships in community:

Is this man reasonably comfortable with the variety of personalities that comprise communities or does he gravitate in an exaggerated manner toward certain personality types among whom he feels safe and comfortable?

Is he basically inclusive in the manner of his dealing with other community members or does he tend toward exclusive or "cliquish" behavior?

Is he at peace with the development of varying levels of relationship within community or does he expect to be deeply intimate with all or equally distant from all?

Is he respectful of others legitimate privacy or do experience him as prying and "gossipy"?

Is this man reasonably at peace amid peoples of varying cultural backgrounds or do you experience him as resistant to or resentful of cultural diversity?

5. Ability to deal with tension and conflict:

Does this man readily admit to and recognize circumstances of tension and/or conflict or does he seem to deliberately "look in the other direction" when trouble is brewing?

Do you find him to be someone who offers constructive suggestions toward positive resolution of conflicts or is he someone who tends to "fan the flames" of discord?

Does he have the capacity to allow others to resolve their differences or is he prone to always be drawn into the heart of the conflict, taking sides or offering "advice"?

Is he at ease amid a diversity of views and ideas or does he become unusually anxious over arguments over ideas? Does he interpret rejection of his point of view as a personal rejection and become inappropriately defensive and/or accusatory?

6. Ability to deal with change and diversity:

Is this man flexible in adjusting his daily rhythm when special occasions or circumstances call for this or is he overly rigid in sticking to "his routine"?

Does he demonstrate the ability to learn from different others or does he tend to quickly devalue and ridicule peoples and practices with which he does not tend to identify? Is he

respectful of others' cultural heritage or do find him overly caustic or dismissive when faced with obvious cultural differences?

While having a clear commitment and preference for those styles and practices which he most values, is he able to recognize possible value in alternative styles and practices?

Is he able to offer thoughtful and constructive criticism (positive and negative) of positions and modes of operation with which he disagrees, or does he tend to disregard or denigrate other options as being self-evidently inferior? Does he tend to hide behind an exaggerated and simplistic distinctions?

PERSONAL LIFE

1. Health:

Is this man reasonably aware of his physical, emotional and mental health needs and limits? Does he tend to habitually push himself beyond these? Does he tend to overly pamper himself and never push himself to excel?

Does he evidence any obvious addictive or compulsive patterns? If he struggles with addictions or compulsive behaviors, is he addressing these in a consistent and responsible manner? Does he "work his program?"

2. Social life:

Does this man show the capacity to develop and maintain healthy friendships with other people beyond the community?

Does he demonstrate a healthy sense of self-esteem in the presence of others or is he easily intimidated by them, often receding into the "background?"

Does his pattern of associations with others strike you as healthy and balanced? Does he tend to surround himself only with "needy" people who pose no threat to him? Does he tend to surround himself only with the most powerful and gifted to feel powerful and important? Does he evidence the capacity to interact meaningfully with those whose tastes and social/cultural backgrounds are significantly different from his own?

3. Stability of character and personality:

Does this man strike you as reasonably even-tempered, or is he prone to major mood swings? Is he prone to depression, excitability, irritability or hyper-activity?

Do his actions and his manner of speech reveal a level of depth or does he strike you as superficial and insincere? Does he demonstrate the capacity for empathy for the struggles and suffering of others?

4. Attitude toward authority and challengers of formation:

Is this man able to relate easily and spontaneously with those entrusted with authority in the community, or does he become overly tense and tentative?

Is he overly deferential toward authority figures, fawning over them and failing to offer appropriate critique and challenge? Does he tend toward a negative and suspicious view of authority, always presuming its intentions to be invasive, controlling and oppressive?

Is he able to recognize situations that might involve or risk the abuse of authority, and is he able to peacefully yet firmly offer and receive a word of challenge in this regard?

Does he take responsibility for his own life and issues, or does he wait for an authority figure to "lay down the law" or "draw the line" for him?

SPIRITUAL LIFE

1. Prayer:

Is this man's presence at community prayer show a real commitment to quality prayer? Do his actions, statements and body language reflect an attitude of presence at prayer?

Does the way he prepares prayer evidence a growing understanding of the dynamics and structure of liturgical prayer? Are his efforts creative and thoughtful or routine and/or arbitrary?

Does he show a healthy respect for the length (history) and breath (diversity) of the various practices that form the Catholic tradition of liturgical prayer? Does his preparation of prayer seem stilted or narrow? Is he too cavalier and willy-nilly in introducing innovations?

Has he grown more confident and more competent in the art of leading public prayer? Is his leadership strong and firm without being stifling and overbearing? Does he communicate a sense of inclusiveness? Does his manner of presiding serve the gathering of the Assembly or tend to dissipate it? Is he alert for and responsive to cultural diversities as these are manifested in the liturgical assembly?

2. Church, theology, sacraments:

Is this man familiar with and appreciative of the diversity of traditions, theologies, cultures and structures that comprise contemporary church life? Does he demonstrate an ability to work easily within a variety of approaches to church?

Do his actions and words convey a sense of being connected to the wider church? Does he seem to be informed about critical contemporary issues as they impact the life of the church?

Does he have a healthy sense of the ecclesial context within which religious communities find their purpose, or does he live out of an exaggerated sense of being insulated from the daily lives of believers?

Does he have a healthy and positive sense of the meaning of religious profession, particularly our vows of poverty, chastity and obedience, or are these viewed solely in negative terms that highlight what must be "given up?"

Do the sacraments of the church seem to play a pivotal role in his spirituality? Is his understanding of the sacraments free of "magical" notions? Is his understanding rooted in contemporary theological insights into the nature of culture, ritual, symbol and liturgy?

3. Capuchin life:

Does this man communicate a sense of excitement and vitality regarding the distinctive gifts of Capuchin-Franciscan life? Is he able to articulate his sense of what being a Capuchin means?

Does he seem suited for the specifically contemplative dimension of our life? Does he seem able and eager to "rest in the quiet" and carry this contemplative dimension into his daily activity?

Has he incorporated and integrated the value of minority into his lifestyle? Does he seem to spontaneously identify with the marginalized in our society?

Does he show interest in and sensitivity to the wide diversity of cultural expressions of Capuchin life that presently inform the Order on a global level?

Does he appear to be developing an integrated lifestyle that bears the five-fold values of a contemporary Capuchin life: contemplation, minority, prophetic mission, fraternity, and justice, peace and the integrity of creation?

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THE NOVITIATE PROGRAM

Capuchin Constitutions and General Comment

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

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

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

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

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

To be valid, the novitiate must comprise twelve months spent in the novitiate community itself. The minister, with the consent of his council, determines when it begins and how it is conducted.

An absence from the novitiate house that exceeds three months, either continuous or intermittent, renders the novitiate invalid. An absence that exceeds fifteen days must be made up. All the other requirements of universal law in respect of the novitiate must be diligently observed (*Capuchin Constitutions* 31).

NB: The continental Capuchin Novitiate Program is governed by its own policies under the direction of the NAPCC.

THE POST-NOVITIATE PROGRAM

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 considered (*Capuchin Constitutions* 32).

###

Post-Novitiate and Ministry Formation Directors
Job Description
(Procedural Level)

1. 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.

- Teamwork
- Familiarity with educational institutions and their operations
- Contemporary understanding of pastoral ministry and the apostolate
- Communications (oral and written)

Abilities = native talents/natural endowments of an individual.

Experiences = personal/community/ministerial experience.

- Public relations (with the province)
- Administration
- Willingness to travel

Experience:

- Some provincial, formation, administrative, and teamwork experience is helpful.

Directors' Duties

- 1) Serve as members of the Formation Council, participate in its meetings, and work with the other members of the council in implementing the initial formation program of the province.
- 2) 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 will consult with and inform provincial leadership as situations require.
- 3) Facilitate the process of ongoing discernment and deepening commitment to our Capuchin way of life for the friars in post-novitiate formation.
- 4) Maintain formation files on all friars in post-novitiate formation.
- 5) Implement all policies and procedures that affect post-novitiate formation.
- 6) Ensure 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.
- 7) Coordinate ministry for temporarily-professed friars.

- 8) Remain in touch with each of the contact people at the ministry sites.
- 9) Facilitate reflection on experience through theological reflection.
- 10) Give, coordinate, or otherwise provide for input in each of the areas required by the procedures of the program.
- 11) Coordinate and conduct evaluations according to the procedures of the Post-Novitiate and the Ministry Formation Program.
- 12) Conduct an annual evaluation of each friar in post-novitiate formation, prepare a written report and recommendation regarding renewal of vows, profession of perpetual vows, or presbyteral ordination for each individual's formation file, and send a copy of these reports and recommendations to the Provincial Minister.
- 13) Coordinate the relationship between Post-Novitiate, the Ministry Formation Program, and the local Capuchin community or ministry.
- 14) Regularly meet with the temporarily-professed friars and candidates for ordination to assess and discuss their progress in all dimensions of formation: charismatic, human, spiritual, intellectual, and pastoral/missionary, as well their life in community.
- 15) In concert with other 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.

New post-novitiate and ministry formation 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.

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Post-Novitiate Procedures

The period of post-novitiate seeks to achieve a balance of ministerial, communal, academic and reflective experiences and skills, thus forming the context for holistic Capuchin discernment.

As a friar begins the post-novitiate period, the directors provide a time of orientation to the purpose, goals, and requirements of the Post-Novitiate Program. Throughout initial formation, friars are expected to engage in ministerial, academic and communal tasks that together form full-time occupation.

In collaboration with his post-novitiate directors, each friar entering the post-Novitiate Program determines the amount of time given to the blend of academic and ministerial learning. It is assumed that each of the elements will be present to some degree. Full and generous participation in Capuchin fraternal life is always present, as are identifiable moments of reflection.

The following elements form the Post-Novitiate Program:

1. Participation in the life of the local Capuchin Community including presence at community events (prayer, meals, meetings, etc.) as well as doing his share of maintenance, cooking, hospitality, and prayer leadership. Full participation in the events of the province is expected. This participation may be deepened by memberships on provincial commissions, ministry councils and committees.
2. Education: At least three credits (or its non-credit equivalent) per semester must be taken in a program leading to a B.A., M.A., M.Div., certificate program or towards the fulfillment of the courses required in post-novitiate. More time may be given to ministry if the temporarily professed friar chooses and the post-novitiate directors approve.

If a friar desires to fulfill the provincial policy for a competency in a way other than a bachelor's degree, he must submit his program or experience to the Formation Council for approval. All advanced degree programs must be approved by the Provincial Minister.

3. Ministry: A minimum of 5-10 hours per week of ministry must be undertaken under the guidance of a ministry supervisor. More time may be given to ministry if the temporary professed friar so chooses and the post-novitiate directors approve. Annually, in preparation for evaluations, the post-novitiate directors shall receive a ministry evaluation from the ministry supervisor. In cases where the temporarily professed friar's ministry is through a school-directed internship or practicum, an evaluation from that program will be satisfactory. The temporarily professed friar shall also prepare an annual ministry self-evaluation.

During the summer months, temporarily professed friars, preferably in groups of two, will generally engage in an intensive Capuchin ministry experience while living in Capuchin friary in a different geographical region of the province, including at least one experience of working with elderly friars. The post-novitiate directors shall initiate an evaluation of the summer experience. A CPE, language-study or cross-cultural experience can take the place of a summer "Capuchin" experience. If requirements of an academic program dictate certain

summer courses or internships, the activities of a given summer shall be determined in dialogue with the post-novitiate directors. Post-novitiate friars may be asked to remain at their home friary to complete courses, and fulfill the hospitality and maintenance needs there.

4. Franciscan/Capuchin Input: Scheduled approximately once a month during the academic year, Franciscan input sessions are required for all friars in post-novitiate. Topics will rotate allowing those in post-novitiate to receive Franciscan/Capuchin input.

5. Theological: Friars in temporary vows shall participate in program-sponsored theological reflection approximately monthly during the academic year.

6. Integration Seminars: An Integration Seminar shall be arranged at least annually for all temporary professed. These seminars will often follow the model of theological reflection. However, other methods of reflection may be used (e.g., critical incident reports, reflection papers, etc.). Topics, tools, recommended readings, methodologies and activities to assist this process are to be gathered in a file for future reference. Topics for these seminars shall include: the vows, sexuality, crossing cultural boundaries, etc. Important to this task of integration are opportunities for personal reflection to address critical questions in the church and ministry. The integration seminars shall last approximately 3-5 days and will take precedence over other activities by the temporarily professed.

7. Additional Post-Novitiate Program elements include:

- Monthly spiritual direction;
- Monthly conferences with the post-novitiate directors;
- An annual retreat (at least 5 days);
- An annual ministry and community evaluation; and
- Attendance at the annual Triduum Retreat

8. Academic advising – beginning studies in Post-novitiate

The Post-Novitiate Director shall arrange with the Postulancy Director(s) a visit to postulants for the purposes of initial academic advising. Notes from this meeting will be kept. Students are expected to file FASFA forms in October during their novitiate year if they are requesting to enter a bachelor's program. It may be appropriate for them to request that their parents complete this form.

During Novitiate, academic plans are reviewed by the Post-Novitiate Director with each novice.

After consulting with the Post-Novitiate Director, novices write the Provincial Minister asking permission to pursue a degree or certificate. Novices should copy (cc:) the Continuing Formation Director and the Post-Novitiate Director on their request, signaling the directors to send a recommendation to the Provincial Minister. However, all certificate and degree programs pursued in post-novitiate and ministry formation are budgeted and funded through the Initial Formation program. Following presbyteral ordination or the beginning of full-time ministry, such expenses become part of the budget of the Office of Continuing Formation.

After the Provincial Minister has given a novice permission pursue a degree or certificate, he may (re)apply to an academic institution and register for classes for the fall term. In selecting courses for their first semester after novitiate, novices should have their plans reviewed by the Post-Novitiate staff. Novices should postpone tuition payment until after they are approved for first profession. Payment of incidental fees for application and registration before approval for vows is permitted.

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Post-Novitiate Practices

"Active formation requires the cooperation of those being formed who are the principal authors of their own growth and the ones primarily responsible for it" (*Capuchin Constitutions* 24:5).

Assumptions:

1. Those entering the post-novitiate level of formation have the capacity as well as the desire to live Capuchin life.
2. The skills, attitudes and values necessary for living our life are already present (in varying degrees) in the person entering the post-novitiate level of formation.
3. The friar in post-novitiate formation wants to solidify and deepen his personal appropriation and integration of the expected skills, values and attitudes.
4. The friar in initial formation demonstrates through his observable behavior that he wants to live our life. This includes not only his visible actions, but also what he freely and sincerely shares of himself with his brothers (local community, province community and formation staff) while living our way of life, i.e., his values, attitudes, aspirations, assessment of people and situations, feelings, faith, and personal history.

During his evaluations, the burden lies with the friar in initial formation to prove that he can and wants to live our life through his personal decisions. This burden does not lie with those doing the evaluation. No one has a right to make perpetual profession as a Capuchin. A friar must demonstrate that he wants to live our life. If his observable behavior demonstrates that he lacks the desire and/or the capacity to live our life, those evaluating him cannot make decisions based upon what underlying reasons for the behavior, but on the observable behavior alone.

5. The temporarily professed friar is the primary human agent of his own formation. The province will provide, as far as possible, the necessary communal, educational, therapeutic, and physical support for him to succeed in his formation and discernment toward perpetual profession.
6. The directors of the post-novitiate can ask of a friar in initial formation what is not fully demonstrated and lived by all the friars in the province.

Practices

1. Friars at the post-novitiate level of formation are responsible and take initiative in community matters, both physical and fraternal.
2. Post-novices are expected to notify the guardian of all overnight absences from the community. All friars should submit their plans for vacations and other times away from the community to the guardian, in coordination with the post-novitiate staff.

3. Friars are expected to maintain the communal life of the friary via cooking, cleaning and extending hospitality to all visitors.
4. Each friar in post-novitiate formation is expected to attend all community events, prayers/meditations and meals. Friars in post-novitiate will also be given opportunities to develop their preaching skills through the sharing of reflections in community liturgies.
5. Individuals will participate fully in school and ministry commitments.
6. Friars at the post-novitiate level of formation are expected to maintain their financial records and promptly process bills to assure payment.

Friars in Post-Novitiate and Ministry Formation are required to submit the report of their grades to the Post-Novitiate Directors at the end of each term. Friars who fail to do so may not be permitted to enroll in classes for the next term.

The purposes of this practice are to ensure that: (1) brothers are making adequate progress in their degree programs; (2) (potential) academic problems can be addressed; and (3) you and the Post-Nov. and Ministry Formation programs are accountable for the investments that the province and especially our benefactors are making in your education. (Approved by Formation Council 03/21/16)

7. Post-novices will maintain vehicles and other equipment that they use.
8. All friars are expected to maintain personal health and will work with the Wellness Director towards identified goals. They will maintain their medical record form and make it available to staff and their local minister. Power of attorney documents will be maintained with the assistance of the local minister.
9. All friars are expected to read provincial publications and respond promptly to provincial requests (information/reservations/surveys).
10. Friars at the post-novitiate level of formation are responsible for keeping their monthly appointments with staff.
11. All friars make and keep their spiritual direction appointments.
12. Post-novitiate friars are expected to share during designated scripture reflections as a part of the community practice.
13. All friars are encouraged to practice positive forms of communication in ministry and educational settings as well as fraternally in the community. Ongoing fraternal living requires that each friar reflect on the progress of their peers during the evaluation process and offer honest feedback to peers.

14. It is necessary that individual post-novitiate friars create and practice a personal schedule that includes private prayer, spiritual reading and meditation. This schedule may be the subject of staff inquiry, support and/or challenge.
15. It is assumed that post-novitiate friars will regularly see a spiritual director and make appropriate use of the Sacrament of Penance.
15. Normally, a friar participates in the perpetual profession pilgrimage the summer after perpetual profession. However, he may participate up to two years following his perpetual profession. If a friar does not participate within two years of perpetual profession, the offer to participate is withdrawn by the province. Friars are reminded that they need the permission of the Provincial Minister to participate in the pilgrimage. (6 February 2015).
16. A post-novitiate friar, at his own request or that of the formation director(s), may be assigned to another house of the Province for up to one year for the purposes of personal growth and integration while entering more fully into pastoral ministry and community life. This is normally done in a provincial ministry. This becomes the central part of his post-novitiate or ministry formation, even if continuing education on a part-time basis. The specific elements of this experience are arranged with the formation director, ministry director, and guardian of the fraternity to which he is assigned. This experience is evaluated in the same way as normally done for post-novitiate, but with a greater emphasis on ministry.

The Process of Evaluation

Evaluation in the post-novitiate formation program is a process, not a moment. No one evaluation erases prior history or negates recurring concerns that may not be highlighted in an evaluation.

A friar in the post-novitiate program should demonstrate the ability to live a balanced Capuchin life that attends to the communal, spiritual, personal, ministerial, education, and multi-cultural dimensions of our way of life.

1. Each simply professed friar will write an initial/draft self-evaluation and give copies to each member of his community and the Post-Novitiate Team.
2. Upon receiving that self-evaluation, every friar in the community--simply professed and perpetually professed (except for the Post-Novitiate Team) will write a brief evaluation (e.g., half to one full page) of each simply professed friar in the community. Copies of each evaluation should be given to the Post-Novitiate Team.
3. Each friar doing the evaluations is expected to meet with each simply professed friar being evaluated to share his written evaluation and provide feedback regarding that friar's self-evaluation. These meetings should be completed before the simply professed friar has his evaluation meeting with the Post-Novitiate Team.
4. Once he has received evaluations/feedback from his peers and the perpetually-professed friars in the community, each post-novitiate friar will then write a final self-

evaluation and give copies to the Post-Novitiate Team.

5. On a designated date and time, members of the relevant community/communities will gather to hear each simply professed friar present his final self-evaluation. Questions may be asked for clarification. Following this gathering perpetually professed members of the relevant community/communities will gather to consider the requests of those applying for renewal of vows or perpetual profession and to vote and provide their recommendations to the Provincial Minister and Council.
6. The Post-Novitiate Team will write final evaluation and recommendations for each friar requesting renewal of vows or perpetual vows. This evaluation will be based on: (1) the friar's final self-evaluation; (2) the evaluations of that friar provided by each member of his community; and (3) the friar's ministry evaluation.
7. The Post-Novitiate Team will present their final evaluations and recommendations to each simply professed friar as part of the final monthly formation meetings of the school year. Following these meetings, the Post-Novitiate Team will send to the Provincial Minister these final evaluations and recommendations.
8. Each friar requesting renewal of vows or perpetual vows must write to the Provincial Minister with his request and reasons. If a friar discerns that he does not want to renew his vows, he should write a letter to the Provincial Minister with his decision and reasons. In either case, these letters should be brief, i.e., no more than two (2) pages.
9. The Provincial Minister and Council will meet and, following the requisite consultation or vote, the Provincial Minister will make his decisions in response to the requests for renewal or perpetual vows and promptly communicate them verbally and in writing to the friars who have made those requests. He will also write a letter of acknowledgment to any friar who has elected not to renew his vows.

Guidelines for Self-Evaluations/Evaluations

Community Life

- Presence to, participation in, and contribution to the community and to community life
- Initiative and sense of responsibility in the community
- Quality of relationships within community
- Communication skills

Spiritual life

- Community prayer: presence, participation, leadership, openness and responsiveness
- The practice of communal meditation
- The place of theological reflection in one's life
- The place of spiritual direction in one's life

Personal life

- Personal, physical and mental health

- Expression of personal values about poverty, obedience, celibacy as manifested in verbal expression and behavior
- Expectations of the post-novitiate formation program
- Views toward church, theology, sacraments, etc.
- Social life outside the community
- Personality dynamics as revealed in community interaction

Crossing cultures

- Content and impact of preparation for crossing cultures
- Experiences of other cultures

Effect of ministry on community

- Comment on the impact of ministry on personal and community life

Effect of learning on community

- Comment on the impact of learning on personal and community life

Guidelines for Ministry Evaluation

The following is the suggested instrument that may be offered to a ministry supervisor for the purposes of evaluation:

Our Capuchin Formation Program requires that friars in temporary vows participate in supervised ministry experience during their initial formation years.

As part of our annual evaluation process leading to the renewal of vows or perpetual vows, we ask the friar in formation to reflect on his ministry experience over the past year. Since each friar and ministry is different, we conduct the ministry evaluation on a very individualized basis. The questions which follow may assist you in evaluating the ministry performed by our friar at your site. Whether or not we are able to meet with you, we would welcome any written comments you wish to make.

Thank you for your time and cooperation in this matter.

1. Please describe the ministry (short job description including hours).
2. How do you evaluate his performance in this ministry?
3. What skills do you believe he brings to your ministry?
4. Have you become aware of any areas of further growth in his ministerial skills?
5. How would you evaluate his relationship to other staff members and those to whom he ministers?

6. What areas of ministry in the church might you recommend that he pursue in the future?

###

THE MINISTRY FORMATION PROGRAM

Capuchin Constitutions

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

Therefore, mindful of the admonition of Saint Francis in his *Testament*: "Let those who do not know how to work, learn," may we strive to acquire the necessary preparation for any service that is required of us.

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

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

Formation for work and ministry shall be planned in such a way that the brothers, in accordance with their talents and vocation, are sufficiently prepared for the duties and offices they will have to fulfil. Therefore, some may learn skills and technical trades, while

others engage in pastoral or technical studies, especially those of a sacred character.

The greatest care shall be taken to ensure that preparation for work and the apostolate is conducted in a true spirit of service, compatible with religious consecration, and in harmony with the journey of initiation, ensuring the primacy of life in brotherhood [Capuchin Constitutions 37 (2013)].

**Ministry Formation Program
Study for the Presbyterate: Process & Criteria
(Procedural Level)**

Stage 1: Inquiry and Preliminary Approval

This period is essentially an exploratory one in which a friar's general aptitude and possession of the skills necessary for ministry, including but not limited to presbyteral ministry, are systematically assessed and confirmed. Considering the claim included in the public ritual of ordination—that inquiry among the people of God has resulted in a man being deemed worthy for the ministry—special attention is paid to gaining testimony from various members of the ecclesial community.

- (1) The friar who has discerned a call to ordained ministry writes a letter to the Provincial Minister and Council requesting permission to begin studies for a Master of Divinity (M.Div.) degree for the completion of the requirements for ordination to the presbyterate. A friar who has discerned a call to ministry as a lay friar similarly writes a letter to the Provincial Minister and Council requesting permission to for the degree or certificate suitable for the area(s) of ministry which he has decided to pursue. At the same time, the Director of Ministry Formation, in consultation with the Director of Continuing Formation and, where appropriate, the Director of Post-Novitiate, offers the Provincial Minister and Council a preliminary assessment of this request and a recommendation regarding its acceptance.

- (2) The Provincial Minister and Council review these materials and offers their written decision regarding approval of the request. A copy of this decision is also sent to the Director of Ministry Formation and, where appropriate, the Director of Post-Novitiate.

Stage 2

This period of preparation is focused on the continuing development of skills associated with pastoral ministry. Of special importance are the ability to function competently and thoughtfully within the liturgical assembly (oral proclamation and ritual), as well as the development of skills and competence in preaching considering the historical role of Capuchins as preachers of the gospel.

- (1) Customarily in his first year of studies, the friar makes a written request to the Provincial Minister to receive the Ministry of Lector. Considering that request, the Director of Ministry Formation prepares and forwards an evaluative report that particularly focuses upon this friar's study of and developing facility with scripture, as well as his developing comfort and competence in the task of oral proclamation of the scriptures in the liturgical assembly. The Director of Ministry Formation will encourage and facilitate opportunities to exercise this ministry in the local community and at provincial celebrations, summer ministries and (when appropriate) the friar's ordinary ministry placement to gain experience and demonstrate competence.
- (2) Following a "suitable period" of time (c. 1035 §1) the friar makes a written request to the Provincial Minister to receive the Ministry of Acolyte. In the case of friars preparing for ordained ministry, the Director of Ministry Formation prepares and forwards an evaluative report particularly focused upon the friar's developing appreciation for and study of Eucharist, as well as his developing ritual competencies within the eucharistic assembly.
- (3) The Post-Novitiate Team and the Director of Ministry Formation will encourage and facilitate opportunities to exercise this ministry in the local community and at provincial celebrations, summer ministries and (when

appropriate) the friar's ordinary ministry placement to gain experience and demonstrate competence.

Stage 3: Ordained Ministry

- (1) At the time of the request for candidacy for the M.Div. degree, usually during the second year, the following evaluations are gathered by the Director of Ministry Formation, who then forwards a formal recommendation to the Provincial Minister and Council regarding the continuation of these studies:

Ministry evaluation (ministry supervisor)

Professional evaluation (dean of students, or dean of academics, or faculty advisor)

Testimony from the local Capuchin community (community of residence)

- (2) The Provincial Council reviews these materials and reaffirms or rescinds its approval to complete the M.Div. degree, sending a written copy of this decision to the friar in question and the Director of Ministry Formation.
- (3) After a period of at least six months (c. 1035 §2), the friar is free to make a written request to the Provincial Council for ordination to the diaconate. This request is accompanied by a recommendation from the director of ministry formation. This recommendation shall serve to summarize the entire period of preparation, including specific mention of the following:

A general statement of the friar's fitness for public ministry in the name of the ecclesial community. Ordinarily such a statement shall include testimony drawn from various members of the church who have experienced this friar in ministerial settings.

Review of the friar's facility in the realm of oral proclamation of the Scriptures.

Review of the friar's competence and performance within the ritual demands of the Church's public worship.

Summary and assessment of the friar's ability to reflect and or preach within the liturgical assembly. Ordinarily this testimony will include the Director of Ministry Formation's personal experience of this preaching at a liturgical event, as well as testimony by other members of the assembly.

- (4) In considering the request for ordination to diaconate, the Provincial Minister and Council shall conduct a formal interview with the requesting friar considering the testimony mentioned in #7.
- (5) Upon the approval of the request of the Provincial Council, the Provincial Minister shall invite an ordaining bishop (preferably a Capuchin) and with the Director of Ministry Formation shall arrange the preparation of all necessary canonical documentation including the dimissorial letters, request for faculties, etc.
- (6) Following the celebration of the Rite of Ordination to the Diaconate, the Provincial Minister or the Director of Ministry Formation shall send the proper canonical notifications, including to the parish in which the friar-deacon was baptized.

Stage 4: Transitional Diaconate

The purpose of this final period of preparation is to help the friar further develop the essential skills for successful presbyteral ministry, while also strengthening his accountability to and acceptance by the larger ecclesial community. It is presumed that one who has been judged suitable for the transitional diaconate will be, barring compelling evidence to the contrary, judged suitable for the presbyterate.

- (1) Upon ordination to diaconate and placement in a ministry, the Director of Ministry Formation facilitates the drafting of a contract between the friar and the community or communities in which he will serve as a deacon. Such a contract will ordinarily provide for the following:

Continued evaluation of his liturgical preaching (including testimony from various members of the liturgical assembly).
Continued evaluation of his general fitness for public ministry in the Church.

Continued evaluation of his ritual competence.

Assessment of his ongoing integration of his emerging ministerial role with his identity as a Capuchin Franciscan friar.

- (2) After the completion of the time designated for the transitional diaconate, the friar is free to make a written request to the Provincial Council for ordination to the presbyterate. This request is accompanied by a recommendation from the Director of Ministry Formation, who gathers the testimony outlined in #11 and the documentation attesting to the successful completion of a M.Div. degree (as well as any other degree or certificate received at that time).
- (3) In considering the request for ordination to presbyterate, the Provincial Minister and Council shall conduct a formal interview with the requesting friar.
- (4) Upon the approval of the request of the Provincial Council, the Provincial Minister shall invite an ordaining bishop (preferably a Capuchin) and with the Director of Ministry Formation shall arrange the preparation of all necessary canonical documentation including the dimissorial letters, request for faculties, etc.
- (5) Following the celebration of the Rite of Ordination to the Presbyterate, the Provincial Minister or the Director of Ministry Formation shall send the proper canonical notifications, including to the parish in which the friar-priest was baptized.

Forms and Documents Used in Initial Formation

The Capuchin Candidacy Program (Vocation Office)

Questionnaire Regarding Indebtedness

This questionnaire should be filled out as part of the application process to the Postulancy Program. It should be reviewed with the staff of the Candidacy Program before application to ascertain how any indebtedness will be retired before entrance into postulancy.

N.B. Concealment of the truth in answering the following questions may be construed as fraud and be cause for dismissal from the formation program.

1. I own taxable property: yes no
2. List the taxable properties you own, here and on back of this form:
3. I have payments to make for insurance: yes no
4. I have to pay alimony: yes no
5. I have child support payments to make: yes no
6. I have fines and/or penalties to be paid: yes no
7. I have filed for bankruptcy: yes no
8. Have the bankruptcy obligations been satisfied? yes no n/a
9. I have outstanding taxes: yes no
10. I have financial liabilities or debts not scheduled: yes no
11. I have acted as fiduciary: yes no
12. I have taken out loans: yes no
13. My loans are all paid off: yes no n/a
14. Have any claims been made against you that could require financial consideration? yes no
15. Do you have any creditors: yes no
16. List any other reasons that you owe money.

On an attached sheet of paper, list how you propose to pay off **each** source of indebtedness.

Signature and date: _____

Printed name and date: _____

Commentary on the Questionnaire Regarding Indebtedness

Fact Sheet

N.B. The "Questionnaire Regarding Indebtedness" should be reviewed by an agent of the province (director of candidacy, the treasurer, or someone familiar with financial issues). If there is indebtedness, it would be wise to ask the amounts of the debts and to see proof of ability to pay. Similarly, if a third party is assuming the debt, that should be in writing.

Furthermore, if there is a debt that the province is being asked to assume, it should be detailed in writing and formally requested of the provincial and his council.

Following are some facts concerning bankruptcy:

Bankruptcy discharge does **not** relieve the following obligations:

Claims not provable, such as certain torts claims, fines, and penalties;
Taxes - generally federal, state, or local, owing within three years preceding bankruptcy;
Liability for willful and malicious injuries to the person or property of another;
Liability for obtaining money or property by false pretenses or representations;
Alimony and support payments;
Liability for seduction;
Debts not scheduled (listed as owed);
Fraud or embezzlement by the bankrupt while acting as fiduciary;
Wages earned within three months prior to bankruptcy;
Sums due employee by bankrupt employer under a contract authorizing retention of sums to secure faithful performance of an employment contract.

This fact sheet is largely a direct quotation from such a sheet prepared by Pat McSherry who cites as a resource *Lanyers Desk Book*, 5th ed., IBP (1978) 21-22.

###

**Affidavit as to Debts and Other Financial Obligations
of Applicants Prior to Admission**

STATE OF _____)
) SS
COUNTY OF _____)

I, _____,
(Name of Applicant) (Address)

first being duly sworn on oath, state that to the best of my knowledge I do not have any unpaid debts and that I am not responsible or liable for the payment of any financial obligation whatsoever other than the following (if no debts or other financial obligations, so state; otherwise, list each debt or financial obligation separately in the space below):

<u>Name and Address of Claimant</u>	<u>Amount</u>	<u>Nature of Claim</u>
-------------------------------------	---------------	------------------------

I also affirm that the attached Release of Claim and/or Agreement to Pay Debt of Another are correct and were signed by the respective parties whose names appear thereon.

Finally, I hereby affirm that I make this Affidavit with the intent that the Capuchin Province of St. Joseph rely upon it in considering my application for membership.

Signature of Applicant and date

Printed name of Applicant

Agreement to Assume the Debt of Another

IN CONSIDERATION of the Province of St. Joseph of the Capuchin Order accepting

_____ to live within its community, I hereby agree to be fully responsible for and to pay the following of his debts and financial obligations:

In the event _____ ceases to live with the Capuchin Community, my obligation under this agreement shall cease at that time.

Dated this _____ day of _____, 20____.

(Person assuming Debt)

(Witnesses)

Questionnaire Regarding Impediments

This questionnaire should be filled out as part of the application process to the Postulancy Program, regardless of intent to seek ordination. It should be reviewed with the staff of the Candidacy Program before application to discuss the nature and implications of any impediments or irregularities and to note the future need for any dispensation. Please explain a “yes” response to any question.

N.B. Concealment of the truth in answering the following questions may be construed as fraud and be cause for dismissal from the formation program. It can also lead to obstacles to future ordination or the invalidity of a future ordination.

1. I have suffered or do suffer from a form of emotional disturbance or mental illness: yes no
2. I have abandoned my Christian or Catholic faith in some way: yes no
3. I have attempted marriage (even civil) while I or the woman was in an existing matrimonial bond, in sacred orders, or in a public perpetual vow of chastity: yes no
4. I have committed or cooperated in a homicide: yes no
5. I have procured or cooperated in an abortion: yes no
6. I have physically and seriously harmed myself or attempted suicide: yes no
7. I have physically and seriously harmed another person: yes no
8. I have performed an act reserved to those ordained as a bishop, priest, or deacon: yes no
9. I have impersonated a bishop, priest, or deacon: yes no
10. I have a wife: yes no

Signature and date: _____

Printed name and date: _____

The Postulancy Program

Letter of Acceptance to Postulancy

(Upon the acceptance of an applicant to Postulancy, the Provincial Minister should send to him a letter of acceptance. Postulancy Directors can offer to the Provincial Minister this model text.)

Mindful that "every brother sent by God brings joy to the fraternity and offers us an incentive to be renewed in the spirit of our vocation" [Capuchin Constitutions 26,1], and in accordance with the norms contained in the same Capuchin Constitutions [19,1 and 27,1-3],

I, Brother _____, O.F.M., Cap., Provincial Minister
of the Province of Saint Joseph of the Order of Capuchin Friars Minor, do hereby ACCEPT
_____ into the Postulancy Program.

FURTHERMORE, I hereby authorize Brother _____, O.F.M.,
Cap. to receive our brother into the Postulancy Program conducted at _____
in the City of _____.

signed: _____

(Provincial Minister)

Given at: _____

Date: _____

[seal of Province]

Declaration Concerning Remuneration

I, _____ born on _____ at _____

in the county of _____ and the State of _____, motivated solely by religious beliefs and principles, desire to pursue membership in the Capuchin Order. I desire to follow, be bound by and have my rights determined by the laws of the Roman Catholic Church concerning the remuneration of residents, candidates, postulants, novices and professed members of religious communities acknowledged by the Roman Catholic Church.

FOR AND IN CONSIDERATION of benefits accruing to me (whether it be as a resident, a candidate, postulant, novice or professed member of the Capuchin Order) I do solemnly state, declare and agree that I shall acquire no right (legal or equitable) to wages, compensation, remuneration, pension, fees or monetary benefits of any sort arising from time spent, efforts made, services or work performed by me from this day forward and for so long as I continue in any way with the Capuchin Order.

LIKEWISE IN CONSIDERATION of the aforesaid benefits accruing to me in the event of accident, injury, disability or death, I agree: 1) that I, and my personal representative, will acquire no right to damages, to compensation or to benefits of any sort from the Capuchin Order or from any of its corporations or members; and 2) that I, and my personal representative, will not sue the Capuchin Order or any of its corporations or members.

Signed at: _____

Date: _____

Signed: _____

Witnesses:

(1) _____

(2) _____

The Novitiate Program

Declaration of Freedom and Intent Before Novitiate

I, _____, son of _____ and _____,

born at _____,

on the _____ day of _____, in the year 20_____,

and now being _____ years of age,

DO SOLEMNLY AFFIRM before God, and in the presence of Brother _____

and these Witnesses, that I intend to be received into the Novitiate of the Province of St. Joseph of the Order of Friars Minor Capuchin, there to spend a *year of probation* as required by the Rule of St. Francis, the Capuchin Constitutions and the Code of Canon Law before the profession of public, religious vows.

MOREOVER, I testify that I do this freely and of my own accord, with no known force or 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 which would prevent my novitiate year, and as a consequence, all subsequent years I spend in the Capuchin Order, from being both valid and licit.

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

Signature: _____

Signature of one receiving the oath: _____

Witness (1): _____

Witness (2): _____

Place: _____

Date: _____

Impediments Regarding Entrance into Novitiate

1. Under 17 years of age.

The person is eligible to enter novitiate on the day after his 17th birthday.

2. Married, during a marriage.

The marriage must still be current. If the spouse had died, or if the marriage has been declared null and void by an ecclesiastical tribunal, the person is not bound to the impediment. The impediment is presumed to bind even in marriages that took place outside the Catholic Church.

3. Current membership in any other institute of consecrated life (religious order) or society of apostolic life.

4. Entrance as a result of force, grave fear or fraud.

This includes the psychological. Is the person withholding some important information? Examples of fraudulent entrance would be the concealing of physical disability or psychiatric disorders, the hiding of a police record, or a dishonorable discharge from military service.

5. Reception of this person (on the part of the superior) due to force, grave fear or fraud.

6. Has this person ever been a member of an institute of consecrated life or a society of apostolic life? To conceal that fact would be an invalidating impediment.

***NOTE:** The *Capuchin Constitutions* 18 also contain requisites, but a judgment on these should have been reached before the signing of the declaration of freedom and intent, e.g. on being temperamentally suited to live the fraternal fellowship of our gospel life; that they firmly hold and believe what the church teaches, etc.

(Notes were compiled by Pat McSherry.)

On Reception into Novitiate

In accordance with the norms prescribed in the *Constitutions of the Order of Friars Minor Capuchin* 31.2, and in testimony thereof, I hereby give witness to the fact that:

I, _____, henceforth known as
 Brother _____, O.F.M. Cap.,
 son of _____ and _____,
 born at _____,
 on the _____ day of _____, in the year _____,
 and now being _____ years of age,
 have been received as a NOVICE in the Province of St. Joseph of the Order of Friars Minor Capuchin
 at _____,
 located at _____,
 on the _____ day of _____, in the year _____.

Signature of Novice: _____

Date: _____

Witness (1): _____

Witness (2): _____

Signature of friar who received this novice: _____

***If other than the General Minister, Provincial Minister or Novice Master, please attach the Letter of Delegation.**

Letter of Delegation to Receive Novices

Peace and blessings!

In virtue of the ministry of service entrusted to me, and in virtue of the provision found in the *Constitutions of the Order of Capuchin Friars Minor* 21.1,

I HEREBY DELEGATE BROTHER _____, O.F.M., Cap.

to perform the rite of receiving novices for our brother(s):

A large, faint watermark of the letters "SAF" is visible across the page. The letters are oriented diagonally, with "SA" at the top left and "F" at the bottom right. The watermark is composed of several overlapping, semi-transparent gray rectangles.

at _____

on the _____ day of _____, 20_____.

The norms found in the approved liturgical books are to be observed.

Provincial Minister

Given at:

(seal of the Province)

Date:

Will of Testator
Page one of four

Will of Testator

I, _____, also known as
Brother _____, O.F.M., Cap.,
of _____,
revoke any prior wills and codicils, and make this my will.

ARTICLE ONE PAYMENT OF EXPENSES AND TAXES

1. My personal representative shall pay from the residue of my estate all valid debts including any taxes owed by me at my death, expenses of administering my estate, including non-probate assets, and any estate and other death taxes, except any generation-skipping transfer tax, which become due because of my death, including any interest and penalties. There shall be no apportionment of any such taxes, and I waive on behalf of my estate any right to recover any part of them from any person, including any recipient of property passing apart from this will.

ARTICLE TWO SPECIFIC GIFTS

2. I give the following:
 - 2.1. I give my tangible personal property as follows:
(Here list specific gifts)
 - 2.2. I give all interest (real or personal) in real property as follows: (Here list real property)

ARTICLE THREE RESIDUE

3. I give the residue of my estate consisting of all property which I can dispose of by will and not effectively dispose of by the preceding articles of this will, except any property over which I may then have a testamentary power of appointment to

ARTICLE FOUR PERSONAL REPRESENTATIVE

4. I nominate _____ as my personal representative.
 - 4.1. Should that person nominated by myself be unable to carry out the responsibilities of personal representative, the Provincial Minister of the Province of St. Joseph of the Capuchin Order, Inc. - a non-profit, religious organization - at the time of my death shall have the power to nominate any additional or successor personal representative.
 - 4.2. No bond shall be required of any personal representative nominated by the Provincial Minister or me.
 - 4.3. My personal representative, in addition to all other powers conferred upon him/her by law that are not inconsistent with those contained herein, shall have the power, exercisable without authorization of any court:
 - 4.3.1. To sell at private or public sale, to retain, to lease, and to mortgage or pledge for the purpose of borrowing money, any or all of the real or personal property of my estate;
 - 4.3.2. To make partial distributions from my estate from time to time and to distribute the residue of my estate in cash or in kind or partly in each, and for this purpose to determine the value of property distributed in kind.
 - 4.3.3. To exercise or not exercise any selection or option granted my personal representative by the Internal Revenue Code or the tax statutes of any state, without making any adjustment to estate principal or income that may be affected by such exercise or non-exercise.

ARTICLE FIVE
GENERAL GOVERNING PROVISIONS

5. The following provisions shall apply to the interpretation of my will and the administration of my estate.
 - 5.1. The rules of law and statutes of the State of _____, insofar as legally possible, except as altered by this will, shall govern in all respects the meaning and legal effect of this will and the administration of my estate. Except as I have otherwise provided, all references to applicable law and statutes mean those in force and effect on the date of my death and shall include any amendments and successor provisions thereto.
 - 5.2. Where appropriate, the feminine includes the masculine, the singular includes the plural, and vice versa.
 - 5.3. I direct unsupervised administration of my estate and that my estate be administered in as informal a manner as my personal representative deems advisable and applicable law permits.

I have signed this will consisting of _____() pages, this page included, on _____, 20____.

Testator

We certify that in our presence on the date appearing above in the State of _____,

signed the foregoing instrument and acknowledged it to be his will, that at his request and in his presence and in the presence of each other, we have signed our names below as witnesses, and that we believe him to be of sound mind and memory.

residing at _____

residing at _____

Self-Proved AffidavitTHE STATE OF _____
ss.

COUNTY OF _____

We, _____ and _____,
(testator) (witnesses, respectively)

____ whose names are signed to the attached or foregoing instrument, consisting of _____ 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 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.

(testator)_____
(witness)_____
(witness)

Subscribed, sworn to and acknowledged before me by _____,

the Testator, and subscribed and sworn to before me by _____ and _____

Witnesses, this _____ day of _____, 20____.

(notary public)

Disposition of Income, Use and Administration of Property During Temporary Vows

I, _____, also known as _____,

Brother _____, OFM Cap., desire to and do hereby for the time

I continue in temporary vows, give the administration of my property to _____,
as trustee. The items given to the trustee are:

The trustee shall dispose of any income arising from the property as follows:

- A. All expenses arising from the property, its maintenance and administration shall be paid first.
- B. In the event any property, income or other taxes arise from the property, the trustee shall pay such taxes and if income is insufficient to pay taxes, the trustee in his discretion can use portions of the property to pay taxes.
- C. Remaining income, if any, shall be given to _____.

In the event of my death during temporary vows, the trustee shall give the property to my personal representative for distribution in accord with my will.

At the time I terminate temporary vows for any reason, the trustee shall deliver all property as I then direct.

Disposition of Income, etc., during Temporary Vows
Page two of two

With the permission of the provincial minister of the Province of St. Joseph of the Order of Friars Minor Capuchin I retain for my use, under the direction of my lawfully appointed religious superior, the following:

Dated this _____ day of _____, 20____.

Witness 1

Witness 2

I, Brother _____, OFM Cap., provincial minister of the Province of St. Joseph of the Order of Friars Minor Capuchin, approve the request of _____ to give the administration of his property and to give its income as stated in this document.

Furthermore, I give permission to _____ to retain for his use, but always under the direction of his lawfully appointed religious superior, the goods itemized above.

Dated this _____ day of _____, 20____.

Provincial Minister

Provincial Secretary

January 2023

Declaration of Freedom and Intent Before First Profession

I, _____, also known as _____
 Brother _____, O.F.M., Cap.,
 son of _____ and _____,
 born on the _____ day of _____, in the year _____,
 and now being _____ years of age,
 DO SOLEMNLY AFFIRM BEFORE GOD, and in the presence of Brother _____
 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. Joseph of the Order of Friars Minor Capuchin.

MOREOVER, I testify that I do this freely and of my own accord, with no known force or 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: _____

Signature of one receiving the oath: _____

Witness (1): _____

Witness (2): _____

Place: _____

Date: _____

Impediments to Making First Profession

1. Under 18 years of age.

The person is eligible to make first profession on the day after his 18th birthday.

2. An invalid novitiate.

See the list of impediments regarding entrance into novitiate: if the person entered the novitiate invalidly the entire novitiate is invalid and all subsequent professions.

3. An invalid novitiate.

A valid novitiate is one that includes 12 months spent in the community of the novitiate itself (see canon 648). The invalidity focuses both on the place and on the length of time. Absence from the novitiate house (even with permission and for whatever reason) which lasts for three months either continuous or interrupted renders the novitiate invalid. An absence of more than 15 days must be made up, or it renders the novitiate illicit. Canon 647,3 does allow the provincial to give permission *to a group of novices* to live for a stated period of time in another house of the institute, designated by himself, without this period of time being counted as time away from novitiate. Periods of apostolic exercises can be part of the novitiate experience, BUT it must be counted over and above the 12 required months. Any overnight spent outside the novitiate community is considered as a day absent from novitiate, unless covered in c. 647,3.

4. Acceptance for making profession must have been *freely* given by the provincial with the vote of the Provincial Council.

5. The profession of vows must be express.

The essential elements are: the name of the person, the religious institute, i.e. the Capuchins (and not just to the rule of St. Francis), the profession of vows of poverty, chastity and obedience, the time for which the profession is made, and the name of the superior of the institute who represents the church and the institute in receiving the profession.

6. The profession must be made without force, grave fear or fraud.

7. The profession must be received by the legitimate superior or by someone legitimately delegated.

The *Capuchin Constitutions* 33.6 also suggest a retreat of unspecified duration.

**Formula for First Profession
from the Constitutions of 2013 (21.4)**

For the praise and glory of the Most Holy Trinity!

Moved by divine inspiration

to follow more closely the Gospel and the footprints of our Lord Jesus Christ,

in the presence of my brothers,

and into your hands, brother N.,

I, brother N.,

steadfast in faith and will,

vow to God the Father, holy and all-powerful,

to live until September 15, [Year]

in obedience, without anything of my own, and in chastity.

At the same time, I profess the life and Rule of the Friars Minor,

confirmed by Pope Honорий,

promising to observe it faithfully

in accordance with the Constitutions of the Order of the Capuchin Friars Minor.

Therefore I entrust myself

with all my heart to this brotherhood,

so that by the working of the Holy Spirit,

after the example of Mary Immaculate,

and through the intercession of our Father Francis,

and of all the saints,

with the help of my brothers,

I may constantly strive for the fullness of love

in the service of God, of the Church, and of all people.

Document of First Profession

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

I, _____, also known as _____,
 Brother _____, O.F.M., Cap.,
 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
 _____, 20_____, have made profession of temporary, simple religious vows
 in the Province of St. Joseph of the Order of Friars Minor Capuchin into the hands of Brother
 _____, O.F.M., Cap., at the friary called
 _____, located at _____,
 _____, on this _____ day of
 _____, in the year 20_____, in the manner prescribed by the *Constitutions*
 21.4, which is as follows

For the praise and glory of the Most Holy Trinity! Moved by divine inspiration to follow more closely the Gospel and the footprints of our Lord Jesus Christ, in the presence of my brothers,

and into your hands, Brother _____,

I, Brother _____, steadfast in faith and will, vow to God the Father, holy and all-powerful, to live until September 15, 20_____, in obedience, without anything of my own, and in chastity. At the same time, I profess the life and *Rule of the Friars Minor*, confirmed by Pope Honorius, promising to observe it faithfully in accordance with the *Constitutions of the Order of the Capuchin Friars Minor*. Therefore I entrust myself with all my heart to this brotherhood, so that by the working of the Holy Spirit, after the example of Mary Immaculate, and through the intercession of our Father Francis and of all the saints, with the help of my brothers, I may constantly strive for the fullness of love in the service of God, of the Church, and of all people.

Signature: _____

Date: _____

Signature of one receiving the vows: _____

Witness (1): _____

Witness (2): _____

Letter of Delegation to Receive a Brother's First Profession

Peace and blessings!

In virtue of the ministry of service entrusted to me, and in virtue of the provision found in the *Constitutions of the Order of Capuchin Friars Minor* 21.2,

I HEREBY DELEGATE BROTHER _____, O.F.M., Cap.

to receive, in the name of the Church and of our Capuchin Fraternity, the first profession of vows of our brother(s):

at _____

on the _____ day of _____, 20_____.

The norms found in the approved liturgical books are to be observed, and the formula of profession prescribed by the *Constitutions* 21.4 is to be used.

Provincial Minister

Given at: _____

(seal of the Province)

Date: _____

The Post-Novitiate Program

Declaration of Freedom and Intent Before Renewal of Temporary Vows

I, _____, also known as _____,
 Brother _____, O.F.M., Cap.,
 son of _____ and _____,
 born on the _____ day of _____, in the year _____,
 DO SOLEMNLY AFFIRM BEFORE GOD, and in the presence of Brother _____

_____ and these Witnesses, that I intend to renew my profession of public, temporary religious vows in the Province of St. Joseph of the Order of Friars Minor Capuchin.

MOREOVER, I testify that I do this freely and of my own accord, with no known force or 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 confirmed by Pope Honorius for our Brother Francis, 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 Friar: _____

Signature of one receiving the oath: _____

Witness (1): _____

Witness (2): _____

Place: _____

Date: _____

Impediments to Renewing Temporary Vows

(Notes by Pat McSherry)

Note: We assume that the novitiate year was valid as was the first profession of vows.

1. The profession is being renewed without force, grave fear or fraud.
2. The renewal of the profession is being received without force, grave fear or fraud.
3. The profession of vows must be express.
4. The profession must be received by the legitimate superior or by someone legitimately delegated.
5. The period of being in temporary vows may not extend beyond nine years.

**Formula for Renewal of Vows
from the Capuchin Constitutions of 2013 (21.4)**

For the praise and glory of the Most Holy Trinity!

Moved by divine inspiration

to follow more closely the Gospel and the footprints of our Lord Jesus Christ,
in the presence of my brothers,

and into your hands, brother N.,

I, brother N.,

steadfast in faith and will,

vow to God the Father, holy and all-powerful,

to live until September 15, [Year]

in obedience, without anything of my own, and in chastity.

At the same time, I profess the life and Rule of the Friars Minor,

confirmed by Pope Honorius,

promising to observe it faithfully

in accordance with the Constitutions of the Order of the Capuchin Friars Minor.

Therefore I entrust myself

with all my heart to this brotherhood,

so that by the working of the Holy Spirit,

after the example of Mary Immaculate,

and through the intercession of our Father Francis,

and of all the saints,

with the help of my brothers,

I may constantly strive for the fullness of love

in the service of God, of the Church, and of all people.

Document of Renewal of Temporary Vows

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

I, _____, also known as _____,
 Brother _____, O.F.M., Cap.,
 son of _____ and _____,
 born on the _____ day of _____, in the year _____,
 and _____ year(s) after having made my first profession of vows, have renewed my profession of temporary, simple religious vows in the Province of St. Joseph of the Order of Friars Minor Capuchin before
 Brother _____, O.F.M., Cap., at the friary called _____, located _____,
 at _____, on this _____ day of _____, in the year 20_____, in the manner prescribed by the *Constitutions* 21.4,
 which is as follows:

For the praise and glory of the Most Holy Trinity! Moved by divine inspiration to follow more closely the Gospel and the footprints of our Lord Jesus Christ, in the presence of my brothers,

and into your hands, Brother _____,

I, Brother _____, steadfast in faith and will, vow to God the Father, holy and all-powerful, to live until September 1, 20_____, in obedience, without anything of my own, and in chastity. At the same time, I profess the life and *Rule of the Friars Minor*, confirmed by Pope Honorius, promising to observe it faithfully in accordance with the *Constitutions of the Order of the Capuchin Friars Minor*. Therefore I entrust myself with all my heart to this brotherhood, so that by the working of the Holy Spirit, after the example of Mary Immaculate, and through the intercession of our Father Francis and of all the saints, with the help of my brothers, I may constantly strive for the fullness of love in the service of God, of the Church, and of all people.

Signature: _____ Date: _____

Signature of one receiving the vows: _____

Witness (1): _____

Witness (2): _____

Letter of Delegation to Receive the Renewal of Vows

Peace and blessings!

In virtue of the ministry of service entrusted to me, and in virtue of the provision found in the *Constitutions of the Order of Capuchin Friars Minor* 21.2,

I HEREBY DELEGATE BROTHER _____, O.F.M., Cap.

to receive, in the name of the Church and of our Capuchin Fraternity, the renewal of temporary vows of our brother(s):

at _____

on the _____ day of _____ in the year 20_____.

The norms found in the approved liturgical books are to be observed, and the formula of profession prescribed by the *Constitutions* 21.4 is to be used.

Provincial Minister

Given at: _____

(seal of the Province)

Date: _____

Declaration of Freedom and Intent before Perpetual Profession

I, _____, also known as _____,
 Brother _____, O.F.M., Cap.,
 Son of _____ and _____
 born on the _____ day of _____, in the year _____,
 having made first profession of temporary vows _____ years ago,
 on the _____ day of _____, in the year 20_____, DO SOLEMNLY
 AFFIRM BEFORE GOD, and before you, Brother _____ and in
 the presence of these Witnesses, that I intend to make profession of solemn, perpetual religious vows in the
 Province of St. Joseph of the Order of Friars Minor Capuchin.

Moreover, I TESTIFY THAT I DO THIS OF MY OWN ACCORD, WITH THE SINCERE
 INTENT 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 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 solemn, 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 mental, 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.

Signature of Friar:

Signature of one receiving the oath:

Witness (1):

Witness (2):

Place: _____

Date: _____

Impediments to Making Perpetual Profession

Fact Sheet compiled by Pat McSherry, OFM Cap.

1. An invalid novitiate.
2. Profession as a result of force, grave fear or fraud.
3. Reception (on the part of the superior) as a result of force, grave fear or fraud.
4. Acceptance for making profession must have been freely given by the provincial with the vote of the Provincial Council.
5. The profession must be received by the legitimate superior or by one legitimately delegated.
6. The person must be at least 21 years old. He is eligible to make profession on the day after his 21st birthday.
7. He must have been in temporary vows for at least three years.
8. The profession must be expressed.

The *Capuchin Constitutions* 33.6 suggest a retreat before making vows.

Letter Concerning the Renunciation of Goods and Conveyance of Property

Dear Brother,

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, dear brother, 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 then have treasure in heaven.**

[Matthew 19:21]

In conformity to the prescriptions of the *Constitutions of the Order of Friars Minor Capuchin* 22.3 and 33.5, 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 the provincial treasurer 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,

Provincial Minister

Province of St. Joseph

Order of Friars Minor Capuchin

Page one of two

Disposition of Property

I, _____, also known as _____

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

son of _____ and _____,

born at _____

on the _____ day of _____ in the year _____, being about to make profession of solemn, perpetual religious vows in the Province of St. Joseph of the Order of Friars Minor Capuchin, in keeping with the requirements of the *Constitutions of the Order of Friars Minor Capuchin* 22.3 and 34.5, and in accord with the norms contained in the *Code of Canon Law* [c. 668, 3 and 4], DO SOLEMNLY AFFIRM that I have disposed of all my worldly possessions, money and property. I DECLARE that I have done so freely and of my own accord.

FURTHERMORE, I do hereby freely and of my own accord ASSIGN, CONVEY, TRANSFER AND GIVE to the Province of St. Joseph of the Capuchin Order, Inc.—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.

With the permission of the Provincial Minister of the Province of St. Joseph of the Order of Friars Minor Capuchin, I retain for my use, under the direction of my lawfully appointed religious superiors, the following:

Disposition of Property
Page two of two

Dated this _____ day of _____, in the year 20_____.

Signature: _____

Witness (1): _____

Witness (2): _____

Sworn and Subscribed to before me

this _____ day of _____, 20_____.

Notary Public

I, Brother _____, O.F.M., Cap.,
Provincial Minister of the Province of St. Joseph of the Order of Friars Minor Capuchin, HEREBY GRANT
PERMISSION to

_____ to retain for his use, but always under the direction of his
lawfully appointed religious superiors, the goods itemized above.

Signature: _____
Provincial Minister

Signature: _____
Provincial Secretary
(Seal of Province)

Date: _____

Last Will and Testament

I, _____, also known as _____

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

son of _____ and _____,

born at _____,

on the _____ day of _____, in the year _____,

do hereby revoke any prior wills and codicils, and make this my will.

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 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. Joseph of the Capuchin Order, Inc. - a religious, non-profit corporation - presently located at 1740 Mount Elliott Avenue, Detroit, Michigan 48207, 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. Joseph of the Capuchin Order, Inc. - 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. Joseph of the Capuchin Order, Inc. 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 of my love and affection, and a life dedicated to Jesus Christ the Lord.

ARTICLE THREE

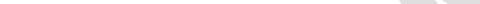
PERSONAL REPRESENTATIVE

3. I nominate and appoint whomever at the time of my death shall hold the office of Provincial Minister of the Province of St. Joseph of the Capuchin Order, Inc. or anyone he shall designate as my personal representative and executor of this my Last Will and Testament.

3.1. Should his office as Provincial Minister terminate before the completion of the administration of my estate, his successor as Provincial Minister of the Province of St. Joseph of the Order of Friars Minor Capuchin, shall have the power to complete 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 _____ () pages, this page

included, on _____, 20_____.


Signature of Testator

We certify that in our presence on the date appearing above in the State of _____,

____ 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 as witnesses, and that we believe him to be of sound mind and memory.

witness

residing at _____

1

residing at

Last Will and Testament
page 3 of 3

Self-Proved Affidavit

THE STATE OF _____

ss.

COUNTY OF _____

We, _____ and _____
(testator) (witnesses, respectively)

____ whose names are signed to the attached or foregoing instrument, consisting of _____ 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 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.

(testator's signature)_____
(witness's signature)_____
(witness's signature)

Subscribed, sworn to and acknowledged before me by _____,

the Testator, and subscribed and sworn to before me by _____

and _____ Witnesses, this _____ day of

_____, 20 _____.

(notary public)

Commentary on Last Will and Testament Before Perpetual Profession

1. It is important that **NON-CAPUCHINS** serve as witnesses to the "Last Will and Testament" since we, the province, are the beneficiaries of the will!
2. In some states (e.g. Wisconsin) it is essential that the individual sign the document in the presence of both witnesses and that both witnesses sign in the presence of each other and of the testator.
3. Testators (those making perpetual profession) should be advised that should they leave the order **this** will remain in effect until they redo their will.

Comments are taken from a letter from Robert H. Bichler, attorney, who reviewed document "Last Will and Testament."

**Formula for Perpetual Profession from
Capuchin Constitutions of 2013 (21.4)**

For the praise and glory of the Most Holy Trinity!

Moved by divine inspiration

to follow more closely the Gospel and the footprints of our Lord Jesus Christ,

in the presence of my brothers,

and into your hands, brother N.,

I, brother N.,

steadfast in faith and will,

vow to God the Father, holy and all-powerful,

to live for my entire life

in obedience, without anything of my own, and in chastity.

At the same time, I profess the life and Rule of the Friars Minor,

confirmed by Pope Honorius,

promising to observe it faithfully

in accordance with the Constitutions of the Order of the Capuchin Friars Minor.

Therefore I entrust myself

with all my heart to this brotherhood,

so that by the working of the Holy Spirit,

after the example of Mary Immaculate,

and through the intercession of our Father Francis,

and of all the saints,

with the help of my brothers,

I may constantly strive for the fullness of love

in the service of God, of the Church, and of all people.

Document of Solemn, Perpetual Profession

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

I, _____, also known as

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

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

_____, 20_____, have made profession of solemn, perpetual religious vows in

the Province of St. Joseph of the Order of Friars Minor Capuchin into the hands of Brother

_____, O.F.M., Cap., at the friary called

_____, located at _____

_____, on this _____ day of

_____, in the year 20_____, in the manner prescribed by the *Constitutions* 21.4,

which is as follows

For the praise and glory of the Most Holy Trinity! Moved by divine inspiration to follow more closely the Gospel and the footprints of our Lord Jesus Christ, in the presence of my brothers,

and into your hands, Brother _____,

I, Brother _____, steadfast in faith and will, vow to God the Father, holy and all-powerful, to live my entire life in obedience, without anything of my own, and in chastity. At the same time, I profess the life and *Rule of the Friars Minor*, confirmed by Pope Honorius, promising to observe it faithfully in accordance with the *Constitutions of the Order of the Capuchin Friars Minor*. Therefore I entrust myself with all my heart to this brotherhood, so that by the working of the Holy Spirit, after the example of Mary Immaculate, and through the intercession of our Father Francis and of all the saints, with the help of my brothers, I may constantly strive for the fullness of love in the service of God, of the Church, and of all people.

Signature: _____

Date: _____

Signature of one receiving the vows: _____

Witness (1): _____

Witness (2): _____

Letter of Delegation to Receive a Brother's Perpetual Profession

Peace and blessings!

In virtue of the ministry of service entrusted to me, and in virtue of the provision found in the *Constitutions of the Order of Capuchin Friars Minor* 21.2,

I HEREBY DELEGATE BROTHER _____, O.F.M., Cap.

to receive, in the name of the Church and of our Capuchin Fraternity, the profession of solemn, perpetual religious vows of our brother(s):

at _____

on the _____ day of _____, 20_____.

The norms found in the approved liturgical books are to be observed, and the formula of profession prescribed by the *Constitutions* 21.4 is to be used.

Provincial Minister

Given at: _____

(seal of the Province)

Date: _____

Notification of Perpetual Religious Profession

Dear Pastor:

Peace and blessings!

As required by the *Ordinances of the General Chapters of the Capuchin Friars Minor 2/16.2*, I am sending you the following notification of **perpetual religious profession**, so that an annotation of the same may be entered into the proper baptismal register, in accordance with canon 353,2 of the Code of Canon Law.

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

born on _____,

given the name _____,

and baptized on _____,

at the church of _____,

located in _____,

in the State of _____,

professed his solemn perpetual vows as a Capuchin Franciscan brother

in the Province of St. Joseph,

on _____,

at _____,

located in _____,

in the state of _____.

Sincerely yours,

Director of Post-Novitiate Formation

Date: _____

(seal)

The Ministry Formation Program

Letter of Delegation to Install a Brother in the Ministry of Lector

Peace and blessings !

In virtue of the ministry of service entrusted to me, and in light of the reply of the Congregation of the Sacraments and Divine Worship given on 15 November, 1979 (Prot. N. 1701/79)

I HEREBY DELEGATE BROTHER _____, O.F.M., Cap.,
- Capuchin Priest -

to install our Brothers(s):

in the ministry of **Lector**

at: _____

on a date to be determined by the delegate.

The norms found in the approved liturgical books are to be observed.

Provincial Minister

Given at: _____

(seal of Province)

Date: _____

January 2023

Testimonial Letter after Being Installed in the Ministry of Lector

Peace and blessings!

I hereby testify that

BROTHER_____, O.F.M. Cap.

was installed in the ministry of **Lector**

according to the prescribed liturgical rite

at _____

in _____

on the _____ day of _____, in the year 20_____.

In testimony thereof, I issue these letters together with our signature and seal.

Provincial Minister

Given at: _____

(seal of Province)

Date: _____

Letter of Delegation to Install a Brother in the Ministry of Acolyte

Peace and blessings !

In virtue of the ministry of service entrusted to me, and in light of the reply of the Congregation of the Sacraments and Divine Worship given on 15 November, 1979 (Prot. N. 1701/79)

I HEREBY DELEGATE BROTHER _____, O.F.M., Cap.,
- Capuchin Priest -

to install our Brothers(s):

in the ministry of **Acolyte**

at:

on a date to be determined by the delegate.

The norms found in the approved liturgical books are to be observed.

Provincial Minister

Given at: _____

(seal of Province)

Date: _____

Testimonial Letter after Being Installed in the Ministry of Acolyte

Peace and blessings!

I hereby testify that

BROTHER _____, O.F.M. Cap.

was installed in the ministry of **Acolyte**

according to the prescribed liturgical rite

at _____

in _____

on the _____ day of _____, in the year 20_____.

In testimony thereof, I issue these letters together with our signature and seal.

Provincial Minister

Given at: _____

(seal of Province)

Date: _____

OATH OF FREEDOM

Before Ordination to the Diaconate

I, Br. N, OFM Cap., a member of the Order of Friars Minor Capuchin, have presented to my superiors a petition for the reception of the Order of Deacon. After mature reflection before God, I hereby testify to and affirm under oath each and all of the following statements:

In receiving this Sacred Order I am not influenced by any force, fear, or violence and of my own full and free will I wish to embrace this same Order with its accompanying obligations.

I am fully acquainted with the obligations which follow from this Sacred Order and freely accept them; and with the help of God, I intend to observe until the end of my life.

I clearly understand what the vow of chastity and the law of celibacy each entail; and with the help of God, I propose to be faithful to these obligations until the end of my life.

In conformity with the sacred canons, I promise most sincerely to obey all the orders of my superiors according to church law; and I am ready to give an example of virtue both in word and in work so that I may deserve to receive from God the reward promised for the acceptance of so great an office.

So help me God, and God's Holy Gospels on which I place my hand.

Signature

Date

Witness

Date

PROFESSION OF FAITH

Before Ordination to the Diaconate

I, *Br. Robert Wotycka, OFM Cap.*, with firm faith believe and profess all and everything that is contained in the Symbol of Faith, that is:

I believe in one God, the Father, the 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 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 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.

I firmly embrace and accept all and everything which has been either defined by the Church's solemn deliberation or affirmed and declared by its ordinary magisterium concerning the doctrine of faith and morals, according as they are proposed by it, especially those things dealing with the mystery of the Holy Church of Christ, its sacraments and the sacrifice of the Mass, and the primacy of the Roman Pontiff.

Signature

Date

Witness

Date

OATH OF FIDELITY

Before Ordination to the Diaconate

I, Br. N, OFM Cap., in assuming the office of deacon, promise that in my words and in my actions I shall always preserve communion with the Catholic Church.

With great care and fidelity I shall carry out the duties incumbent on me toward the Church, both universal and particular, in which, according to the provisions of the law, I have been called to exercise my service.

In fulfilling the charge entrusted to me in the name of the Church, I shall hold fast to the deposit of faith in its entirety; I shall faithfully hand it on and explain it, and I shall avoid any teachings contrary to it.

I shall foster the common discipline of the entire Church and I shall insist on the observance of all ecclesiastical laws, especially those contained in the Code of Canon Law.

With Christian obedience I shall follow what the Bishops, as authentic doctors and teachers of the faith, declare, or what they, as those who govern the Church, establish. I shall also — with due regard for the character and purpose of my institute — faithfully assist the diocesan Bishops, so that the apostolic activity, exercised in the name and by mandate of the Church, may be carried out in communion with the Church.

So help me God, and God's Holy Gospels on which I place my hand.

Signature

Date

Witness

Date



Let it be known that

BR. N., OFM Cap.

was ordained a Deacon

by

the Most Reverend [Name of Ordaining Bishop]

at

[Name of Church or Friary]

[City, State]

on the [] day of [Month]

in the year of Our Lord

Two Thousand [].

[Title]

[Bishop's See/Diocese]

Date

NOTICE TO PARISH – ORDINATION TO THE DIACONATE

[Date]

Pastor

[Name of Parish of Deacon's Baptism]

[Address]

[City, State Zip]

Dear Father:

Peace and all good!

I am pleased to send you the following notification of **ordination to the diaconate**, so that an annotation of the same may be entered into the proper baptismal register, in accordance with cc. 535 §2 and 1054 of the Code of Canon Law.

Brother	[Name], OFM Cap.
born on	[Date] in [Place]
given the name	[First and Middle]
baptized on	[Date]
at the church of	[Name of Church]
by	[Name of Priest or Deacon]

was ordained to the transitional diaconate

on	[Date]
at	[Name of Parish or Friary]
located in	[City]
in the state of	[State]
by	Most Reverend [Name of Bishop, Title] [Name of Bishop's See/Diocese]

Sincerely,

[Name], OFM Cap.
 [Title]
Province of St. Joseph of the Capuchin Order

OATH OF FREEDOM

Before Ordination to the Presbyterate

I, Br. N., OFM Cap., a member of the Order of Friars Minor Capuchin, have presented to my superiors a petition for the reception of the Order of Presbyter. After mature reflection before God, I hereby testify to and affirm under oath each and all of the following statements:

In receiving this Sacred Order I am not influenced by any force, fear, or violence and of my own full and free will I wish to embrace this same Order with its accompanying obligations.

I am fully acquainted with the obligations which follow from this Sacred Order and freely accept them; and with the help of God, I intend to observe until the end of my life.

I clearly understand what the vow of chastity and the law of celibacy each entail; and with the help of God, I propose to be faithful to these obligations until the end of my life.

In conformity with the sacred canons, I promise most sincerely to obey all the orders of my superiors according to church law; and I am ready to give an example of virtue both in word and in work so that I may deserve to receive from God the reward promised for the acceptance of so great an office.

So help me God, and God's Holy Gospels on which I place my hand.

Signature

Date

Witness

Date

OATH OF FIDELITY

Before Ordination to the Presbyterate

I, Br. N., OFM Cap., in assuming the office of presbyter, promise that in my words and in my actions I shall always preserve communion with the Catholic Church.

With great care and fidelity I shall carry out the duties incumbent on me toward the Church, both universal and particular, in which, according to the provisions of the law, I have been called to exercise my service.

In fulfilling the charge entrusted to me in the name of the Church, I shall hold fast to the deposit of faith in its entirety; I shall faithfully hand it on and explain it, and I shall avoid any teachings contrary to it.

I shall foster the common discipline of the entire Church and I shall insist on the observance of all ecclesiastical laws, especially those contained in the Code of Canon Law.

With Christian obedience I shall follow what the Bishops, as authentic doctors and teachers of the faith, declare, or what they, as those who govern the Church, establish. I shall also — with due regard for the character and purpose of my institute — faithfully assist the diocesan Bishops, so that the apostolic activity, exercised in the name and by mandate of the Church, may be carried out in communion with the Church.

So help me God, and God's Holy Gospels on which I place my hand.

Signature

Date

Witness

Date

**PROVINCE OF ST. JOSEPH
OF THE
CAPUCHIN ORDER**

Let it be known that

BR. [Name], OFM Cap.

was ordained a Presbyter
according to the Rites of the Roman Catholic Church

by

the Most Rev. [Name of Ordaining Bishop]
[Title]
[Name of See/Diocese]

at

[Name of Church or Friary]
[City, State]

on the [] Day of [Month]
in the year of Our Lord
Two Thousand [].

Most Rev. [Name of Ordaining Bishop]

Date

BISHOP'S CERTIFICATION OF ORDINATION TO THE PRESBYTERATE

[Date]

To Whom It May Concern:

This is to certify that **[Name], OFM Cap.** is a priest ordained according to the rites and regulations of the Roman Catholic Church, for the St. Joseph Province of the Order of Friars Minor, Capuchin and incardinated as said Order.

Date of Ordination
Place of Ordination

[Date]
St. Lawrence Seminary Chapel
Mt. Calvary, Wisconsin

Ordaining Bishop

Most Rev. [Name]
[Title/Type of Bishop]
[Name of See/Diocese]

Order or Diocese

Province of St. Joseph
Order of Friars Minor, Capuchin

In witness whereof, I have hereunto set my hand and seal in the day and date given above.

Most Rev. [Name]
[Title/Type of Bishop]
[Name of See, Diocese]

NOTICE TO PARISH—ORDINATION TO THE PRESBYTERATE

[Date]

Pastor
 [Name of Parish]
 [Address]
 [City, State Zip]

Dear Father:

Peace and all good!

I am pleased to send you the following notification of **ordination to the presbyterate**, so that an annotation of the same may be entered into the proper baptismal register, in accordance with cc. 535 §2 and 1054 of the Code of Canon Law.

Brother	[Name], O.F.M., Cap.
born on	[Date] in [Place]
given the name	[Full Baptismal Name]
baptized on	[Date]
at the church of	[Name] in [Place]
by	[Title and Name of Baptizing Priest/Deacon]

was ordained to the presbyterate

on	[Date]
at	[Name Church or Friary]
located in	[City]
in the state of	[State]
by	Most Reverend [Name of Ordaining Bishop] [Title] [Name of See or Diocese]

Sincerely,

[Name], OFM Cap.
 [Title]
Province of St. Joseph of the Capuchin Order