

Study Group Resources

As a Study Group journeys toward forming a Carmelite Community there are many things to learn and grow in. This informal handbook is intended as a help and resource along the way. Please feel free to give the Provincial Council feedback on further information that would be helpful to other new Carmelite groups.

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1. Where to find information

Our most important resource is the OCDS Constitutions and Provincial Statutes. Browse them often, make notes, and discuss them in community.

Other information, such as provincial polices, procedures, and “best practices” can be found on the provincial website, <http://dev.thereocds.org/>. Visit often and browse around. It is a wonderful resource for developing a Study Group into a vibrant Carmelite Community.

At some point, every Study Group is going to be especially interested in the documents on becoming a canonically established OCDS Community. These are on the provincial website under “provincial policies”. There members will find what they need to be working on as their Study Group grows and matures. Take it in baby steps, one new thing at a time.

While we recommend going to the primary sources for information, there will be times when extra help is needed. Please feel free to contact someone on the Provincial Council for clarification and encouragement. The Study Group’s regular visitor would probably be the best person to start with, but any of us are happy to help.

2. Paperwork

It is important to begin keeping records early on. This is much more effective than trying to reconstruct from memory and scattered documents.

a) Group history

The Study Group’s history will be needed when the time finally comes to apply for canonical elevation to OCDS Community. A running history of the group, regularly updated, will be easier to than trying to piece the information together later.

Many Study Groups have a person whose is responsible for keeping the group history up to date. Some change this person every few years, others do not.

The history should include

- how the group was started
- date of founding
- names of first coordinator and formator
- first members
- Mentor Community information
- date of elevation to Study Group status
- names of Carmelite friars involved with the group, when and how
- Spiritual Assistants’ names and when connected with the group
- provincial visitors’ names and when they were connected with the group

Interesting but optional

- meeting schedules from year to year
- attendance at OCDS Congresses and workshops
- development of the formation program
- group apostolic activities
- important events and items of interest (some communities keep a scrapbook for this)

b) Record of leadership history

Keep track of who has served in what capacity and when, both elections and appointments.

c) Record of membership history

The group Secretary keeps an ongoing record of the names of everyone who entered – aspirancy dates, clothing dates, profession dates. Also include a record of who left, from what level, when, and whether eligible to rejoin the group in the future.

Study Groups and Communities are expected to keep permanent records for everyone who ever belonged to the group/Community. See the Provincial Statutes for these forms.

As members are admitted to and complete aspirancy and formation for promises, an updated copy of their record is sent to the Provincial Office. Members are given a copy for their personal records as well. This is especially important when a member moves. It makes the transfer go much more smoothly.

d) Minutes

Meeting minutes are required. Refer to the provincial website, “policies” for what to include in the minutes.

Minutes are kept for both monthly meetings and for council meetings.

Study Groups email a copy of their minutes to the Provincial Council secretary each month.

e) Attendance records (*see also attendance policy, absences, and leave of absence, below*)

Well-kept attendance records are a help in discerning a candidate’s readiness to be admitted to the next level of formation. Faithful attendance is one of the key signs of a genuine vocation to Carmel.

To keep track of who attends or is absent each month, many groups use a simple sign-in sheet in a ring binder or spiral notebook. Others have members check their names off a written roster. Others have roll call and keep track on an attendance log similar to those used by school teachers.

Groups are free to use whatever method works for them. Most groups change methods as the group’s needs change. Always use first and last names. Attendance is always noted in the meeting minutes.

f) Finances

It is very necessary to keep track of income and expenses. A three-year budget is recommended because some expenses only come up every three years. Be sure to set money aside for sending a representative to the triennial Plenary Council.

See the Provincial Statutes section XIV for important information on finances.

Also see the provincial website, under “policies” “finances” for additional information.

Always keep group money separate from personal money.

3. Monthly meetings

In mature OCDS Communities, meetings are generally between four and six hours long to allow adequate time for everything.

- Socializing
- Mental prayer
- Liturgy of the Hours
- Formation study (whole group and individual levels)
- Business meeting

New groups generally don't meet for this long when they are first started. They do, over time, expand their meetings to include everything, changing the meeting schedule as the group matures.

4. Liturgy of the Hours

Study the General Instruction of the Liturgy of the Hours, published by the USCCB and available through their website. Online copies can be found in various places, including EWTN's website.

The main concerns in group recitation are harmony and prayerfulness. Strive to use a moderate pace, with a slight pause at the end on each line of the psalms. Think of it as poetry rather than prose.

Many OCDS Communities follow the same method that the Carmelite friars use for praying the Liturgy of the Hours. See the provincial website, "best practices" "liturgy."

The Order of Carmel has solemnities, feast days, and memorials that are specific to the Order. Proper parts of the Liturgy of the Hours for these special days can be found in the Carmelite Proper (which is out of print at present). Copies sometimes surface in used book stores, but are often expensive. PDF documents can be found online at carmelcanada.org/liturgy/office.pdf. Communities are free to print these out for their members' use.

The Carmelite Proper published by the Carmelites in Ireland and England is not approved for use by US and Canadian Provinces.

5. Formation

OCDS communities, Study Groups and GIDs must follow the provincial formation guidelines. These have been approved by the OCD General Definitory for use in our province. Also visit the provincial website for best practices in formation and for online formation materials.

The purpose of formation is to help members fully live the vocation to Carmel. When evaluating the effectiveness of the group's formation, primary resources include the OCDS Ratio Institutionis and the OCDS Constitutions the Preface through paragraph 36.

One pitfall groups run into is when members want to discuss outside interests, such as private revelations (visionaries) and personal devotions. Keep the focus on the vocation to Carmel, growth in prayer and virtue, and the universal call to holiness.

Another challenge is ongoing formation for those who are definitively professed. See the provincial formation guidelines for recommended resource materials for Definitives' ongoing study. Definitives need to avoid the attitude of having "graduated." Formation, like continuing religious education, is a life-long commitment

6. New members

See the provincial website, “best practices” “discernment” for guidelines and helpful articles.

Something that is often overlooked by inexperienced Study Groups is that people interested in entering Carmelite formation must be pre-screened. It can be heartbreaking to accept new members only to later find out that they are not able to be part of Carmel and must be dismissed.

Impediments to entrance include, but may not be confined to, the following:

- Under 18 years of age;
- Not able, for any reason, to participate in the sacraments;
- Not confirmed in the Church;
- If married, not married in the Church;
- Re-married outside the Church;
- Holding beliefs that are expressly in opposition to Church teaching
- Living a style of life that is considered scandalous and in opposition to Church law.
- Belongs to another religious order.
- Membership in an organization with specific spiritual requirements

Please take this responsibility seriously. It can be heartbreaking to accept new members only to later find out that they are not able to be part of Carmel and must be dismissed.

7. Admissions to Formation I (clothing in the scapular)

Study Groups are empowered to admit candidates to Formation I.

Be sure the candidate has met the formation goals listed in the formation guidelines. Refer to the provincial website “best practices” “discernment”.

A note of caution: Please do not accept someone for clothing who is clearly not called to Carmel or not suited for community life. Please do not accept a person out of charity to avoid hurt feelings; it will only be harder to face later on.

Mentioned in the formation goals, but often not emphasized enough is “compatibility with other members”. Quirks are okay (they add zest), but inability to get along is not. This is one of the more common problems that Communities run into. An unpleasant or unstable person, accepted out of misguided charity, becomes a grief to the Community, continually disruptive, divisive, and dissatisfied. As difficult as it is to say “no” to a candidate, it is far kinder in the long run, both to the group and to the candidate, to face reality and turn the candidate away at the beginning. The Council’s first responsibility is to protect the well-being of the community.

The Council’s vote on acceptance is by ballot, not by consensus. These are tallied by two of the council members at the time of the vote.

8. Discernment for promises

Study Groups are not empowered to approve candidates for the Promise. Those in leadership go through the discernment process, write up their report and recommendations, and then submit everything to the Provincial Council for review. The more open and thorough the report is the better.

This procedure helps the Study Group’s leadership develop discernment skills. It is a gradual learning experience. Don’t expect to get it just right every time.

Go to the provincial website “policies” “Study Group profession discernment process” as a starting place. Also refer to the provincial website, “best practices”, “discernment”.

The vote on acceptance is by ballot, not consensus.

It is very common for the Provincial Council to contact the local Council for more information. The Provincial Council may request a phone interview with the candidate.

9. Isolates, aged, and infirm (*see also attendance policy, absences, and leave of absence, below*)

See Provincial Statutes section VIII, and OCDS Constitutions paragraph 56.

Study Groups and Communities may not accept anyone into formation who is not able to attend meetings.

When a person in aspirancy or Formation I (*preparing for First Promise*) becomes unable to attend meetings, the person discontinues membership in the group. The Council may readmit later when the situation is resolved.

When a Study Group has a member in Formation II (*has made First Promise*), who becomes unable to attend meetings:

- a. If this person is in a situation demanding all his/her time and energy, it may be a good decision to withdraw temporarily and then come back to the group when able to attend the monthly meetings again.
- b. If this person has become homebound, but is otherwise able to do all that is expected of a Carmelite in formation, please contact your Provincial visitorator for advice. If you do not have a visitorator, please contact the Provincial Council President. These situations are handled on an individual basis.
- c. If this person has moved and is no longer near an OCDS community, please contact your Provincial visitorator for help. Study Groups may not oversee the formation of isolate members.

Definitively professed members who become homebound remain an important part of their Community, serving Christ through their suffering and sacrifice. See the Provincial Statutes section VIII.5. They are not considered Isolates, but Infirm Members.

10. Transfers

See the Provincial Statutes, sections XVII to XIX, and the transfer request on the provincial website – “forms” “transfer.” See also “provincial policies” on the provincial website.

Be sure members who are moving away have contact information for both their old group (to give to their new Community), and for the Communities nearest their new home.

11. Elections

Study Group councils are appointed by the Provincial Delegate. When a group becomes large enough, it is given permission to have elections according to guidelines in the Provincial Statutes section XVI, with some variations.

These elections are to help Study Groups learn how to function as an OCDS Community. It is important that Study Groups learn to change leadership smoothly. Members need to be able to sometimes lead and sometimes follow, as God calls them.

Study Group Elections Procedure

First read the 2016 Statutes sections XIII.7-8 and XVI.2

Everything is the same as for canonically established OCDS Communities, up to the election itself. Only professed members (first or definitive) may serve on the Council. Only professed members (first or definitive) may vote. Members must be present to vote.

The Ballot

List all the candidates on one page. The presidential candidates are put at the top, marked in some way to show that they are different from the councilor candidates. Candidates for councilor are added below.

At the time of the election, a ballot is given to each professed member. The members vote by writing “president” next to the presidential candidate they want, and writing “council” next to their choices for council according to the number of positions open.

In other words if there are to be two councilors, each member chooses two names, if only one councilor they choose only one name.

After choosing one candidate for president, they may mark the other presidential candidate as their choice for councilor if they would like.

Sample ballot:

*(assuming there are **two** councilors, if there is only **one** councilor then members mark only one)*

Candidates for president are in bold print . Please select one president, and two council members	
Susie Carmen	<i>council</i>
John Cruz	<i>president</i>
Terry Avila	
Mary Rose Carmelo	<i>council</i>
Ely Mantel	

The completed ballots are collected and sealed in an envelope without being counted. Then they are mailed to the Provincial Council president as soon as possible.

The Provincial Delegate will make the Council appointments by email.

Formation Director

After the new Council is appointed, they meet to discuss who to recommend for Formation Director. The Council should take the time needed to thoroughly evaluate possible candidates. Candidates must be definitively professed, and preferably have experience as a formator.

The new president contacts the candidates about their willingness to serve. The Council then makes their selection and the president sends their recommendation to the Provincial Delegate.

The Provincial Delegate will make the appointment by email.

If there are any questions, please contact the Provincial Council.

12. Leadership

See the OCDS Constitutions, paragraphs 46-47, and 50-55. Also see the provincial website, “best practices” “councils and leadership”, with special attention to “Q&A with Fr Aloysius Deeney OCD”.

13. Spiritual Assistant

See the OCDS Constitutions, paragraph 44. Also see the provincial website “best practices” “councils and leadership” “duties of a spiritual assistant”.

The group’s Spiritual Assistant should be a Carmelite friar if possible. Carmelite friars have a better understanding of the vocation of the OCDS within the larger Order of Discalced Carmelites.

If a friar is not available to serve as Spiritual Assistant, a diocesan priest, deacon, religious, or a professional lay ecclesial minister with background in and appreciation for Carmelite Spirituality may serve as a Spiritual Assistant, with the approval of the Provincial Delegate.

It is not necessary for the Spiritual Assistant to attend the monthly meetings. The Spiritual Assistant does not attend Council meetings, unless requested by the Council.

It is customary to give the Spiritual Assistant a stipend for his work with the group.

14. Provincial Council visitations

See the Provincial Statutes, section XXII.2-4.

Study Groups receive a pastoral visitation every two years. The purpose of the visitation is to help the Study Group with their development into a Carmelite Community. The visitor’s aim is to offer encouragement, information, assistance, and support to the Study Group.

The visitor contacts the group’s leadership about dates for the visitation, documents needed before the visitation, working out a schedule for the visitation, and other items.

During the visitation, the visitor meets with the group’s leadership, talks with members in various levels of formation, and attends the group’s monthly meeting. The visitor makes time to see any members who have questions or concerns. The visitor gives feedback on the group’s strengths as well as areas that need extra attention.

Afterwards, the group receives a written evaluation from the visitor. The Provincial Delegate also sends the group leadership his comments and suggestions.

15. Apostolate

Visit the provincial website, “policies” “apostolate”.

Also read Section III of the Provincial Statutes. Especially note paragraph 3: “The primary Carmelite Community apostolate is to share Carmelite spirituality with others.” Very simply, our first focus is always on the spread of Carmelite spirituality. In addition to our primary apostolate, other apostolates in service of those in need are certainly worthy.

Study Groups are not required to have a group apostolate, but are encouraged to discuss, explore, and experiment in developing one.

16. Feast days and fasting

See Section V of the Provincial Statutes.

Celebrating feast days together helps to nurture the sense of camaraderie which is so important for building community. Here's a chance to be creative and have a bit of fun as a group. Make note of these celebrations in the monthly minutes.

Many groups find it helpful to designate an individual or a team to coordinate celebrations throughout the year.

17. Attendance policy

Every Community is supposed to have an attendance policy. The provincial website's "provincial policies" page offers help in drafting one.

18. Absences

When a member is going to be absent, it is important that he/she informs a leader of the group as soon as possible.

The absent member in formation will need to make up the missed materials. This can be done by an extra meeting with the formator (teacher/leader). Or the member might write up a paper showing what was learned from the material. It is up to the Formation Director with the rest of the Group Council to decide how members may make up missed formation.

Keep a record of absences that members have made up, so that when the time comes for discernment for clothing or the promise there will be no confusion.

Please remember, though, that formation is much more than just studying the materials. The Carmelite vocation is lived *in community*. Attending meetings must be a high priority for Carmelite members.

19. Leave of Absence

See the Statutes, Section VIII.8-9.

See also the provincial website, "provincial policy."

Leave of Absence is for definitively professed members who need time away from the community.

20. Community life

Please see the Provincial Statutes section VIII.

As said above, the vocation to Carmel is lived in community. Members should not miss meetings except for serious reason. The ability to form community includes putting a high priority on participating in the monthly meetings and yearly retreat, and is one of the areas evaluated for discerning a vocation to Carmel.

Members who are disruptive or upset the harmony and peace of the group need to be dealt with charitably, promptly, and firmly. Ability to form community is an important part of discernment for membership. [Statutes IX]

21. What Secular Carmelites do

Our life as Carmelite Seculars is often condensed into six areas, popularly called the six M's, as described by Fr Aloysius Deeney. (Testing and Discerning a Vocation to Carmel)

- 1 Meditation (half an hour daily of silence and solitude with God in interior prayer, especially lectio divina)
- 2 Morning and evening prayer, night prayer when possible (with examen)
- 3 Mass (and the Sacrament of Reconciliation)
- 4 Mary (our model for prayer and discipleship)
- 5 Meetings (we belong to a religious order and our vocation is lived in community)
- 6 Mission (to know God, that God may be known)

That's it. It sounds simple, but it is not easy. Carmelites are called to total conversion, to be transformed into Christ. The ultimate goal is union with God. We study St Teresa and St John of the Cross as our spiritual guides.

See the OCDS Constitutions paragraphs six through 31.

We live in allegiance with Christ, promising to strive for evangelical perfection and to live the beatitudes. Clearly, it's not just a matter of studying certain materials, performing certain practices, and giving God a certain amount of time and attention. What we *do* is under the promise of obedience. The *purpose* of what we do is to transform who we *are* in our deepest selves.