

Spanish Regional Conference

SANTA MARÍA LA REAL
DE LAS HUELGAS

12 - 17 March - 2024



INDEX

	Page
Abbreviations.....	4
Participants	5
Introduction.....	6
 I. Topics proper to the General Chapter	
1. Evaluation of the General Chapter 2022 (2nd part).....	9
2. General Chapter Commissions	10
3. House reports	11
4. Regional Report	11
5. Common Novitiates	12
6. Immediate Mothers and document submitted by the Law Commission	12
7. Revision of the male and female constitutions	14
8. Status of the Constitutions according to GC 2022 votes and response from DIVCSVA ..	15
9. Statute for Accompanying Fragile Communities: "affiliation"	16
10. Economic visit of an expert before the regular visit and before GC 2025.....	16
11. Renewal of the Order's Financial Structures.....	17
 II. SR-specific issues	
1. Anti-abuse protocol.....	18
2. SR elections	18
3. Reports from the co-ordinating abbots and abbesses.....	19
4. Report of the male and female internships	34
5. Economics of NoE.....	38
6. Other issues: Shared discernment	39
7. Self-assessment and closure of the NoE	39
 III. Annexes	
i. Report on Common Novitiates	41
ii. Report on Immediate Mothers	44
iii. Report on the state of the Constitutions.....	56
iv. Report on affiliation	73

v. Report on the economic visit80

vi. Report on the renewal of the Order's financial structures.....94

vii. Anti-abuse protocol.....104

Votes.....116

ABBREVIATIONS

ABS	Abstention
	AGAbad General
C. CST.	Constitution, Constitutions
CCCentral Commission	
CCSB	Cistercian Congregation of St. Bernard
CM	Monastic Commissioner
CMix	Joint Commissions
CO	Cor Orans
RC	Regional Conference(s)
DIVCSVA	Dicastery for the Institutes of Consecrated Life and Societies of Apostolic Life
	EACFEstatute of Accompaniment to Fragile Communities
EST	Statute
	IRI Regional Report
M.	Mother
	MAMonasterio Asistencial
Immediate	MOM
	OCSOOrder of the Cistercian Order of the Strict
Observance	
P.	Father
Immediate	PIParent
PREM	Monastic Regional Curriculum
SR	Spanish Regional Conference
SFTraining Secretariat	

PARTICIPANTS

Superior

D. Isidoro M^a ANGUITA, President
M. Isabel RIVERO, Vice-President
D. Carlos GUTIÉRREZ, Moderator
M. Pilar GERMÁN, Moderator

D. Fco. Javier
Mr Juan José DOMINGOS
P. Juan M^a DE LA TORRE
D. Roberto DE LA IGLESIA
D. Antonio M^a MARTÍN

M. Encarnación LLUCH
M. Stella Maris VENEZIA
M. Carmen Jesús
M. Ana MONEO
M. M^a de los Ángeles DE FRUTOS, Abbess President of the CCSB

Monastery

Huerta
Vico
Sobrado
Tulebras
URÓSLa Oliva
. Isidro
Oseira
Cardeña
Zenarruza

Benaguacil
Carrizo
SERRANOLa Palma
Armenteira

Delegate

P. Bernabé
P. Francisco Rafael DE PASCUAL
P. José Luis GALIANA
Br. Rafael ESCOBAR

Monastery

DOMÍNGUEZSan Isidro
Viaceli
Cardeña
Sobrado

Sr. María TÉLLEZ
Sr. M^a Ángeles GIL de
Sr. M^a Ángeles OSÉS

Vico
PAREJALa Palma
Armenteira

Guest

D. Bernardus PEETERS, Abbot General
D. Marco Antonio MALDONADO, Director of the AG

Secretariat

P. Paco RIVERA, from Huerta, secretary
Br. Guillermo J. IMBERT, from Cardeña, Bursar
P. Raphaël GARCÍA-PELAYO, GA Secretary and translator

After almost two years since the last meeting (Tulebras 2022), the Spanish Regional Conference (=RE) is meeting again in its modality of superiors and delegates in order to study the themes proposed for the General Chapter (=CG) of 2025 and some questions specific to our region, in the Monastery of Santa María La Real de Las Huelgas from 12 to 17 March 2024.

Fr. Isidoro M^a ANGUIA, from Huerta, celebrated the opening mass of the SR on the first day. And in his homily to the participants he said that "*... the message of hope of the prophet Ezekiel, in his vision of the Temple, is also for us. A water full of life and of which we can only be its bearers... We have a mission to fulfil in the world and that is through personal conversion capable of generating the life of Christ in the community and transmitting it to all those who want to see it. Our monasteries are indispensable in our world when they are bearers of that torrent of living water that flows from the Temple. Let us be concerned with nothing more than drinking the living water of Christ, letting it transform us and being bearers of it in the community and in the midst of the world. Perhaps we are tired of waiting like the paralytic who had been waiting for 38 years. Waiting for what? Those who fear may forget to live what they already have, those who trust, however, anticipate what they hope for. I confess to you that sometimes it is a deep tenderness for me to contemplate praying communities, very weakened. I look at them like a vessel so thin that it becomes transparent, revealing the water it contains. When the vessel is very solid, robust, beautiful, it can hide the water it carries; but when it is fragile, it reveals its contents. Let us do our best, not to make our vessel sturdy, but to carry abundant and life-giving water. We have a mission that we must continue to carry out with no other concern than to promote the flow of water from the temple to the sea of salt. For this we need to be simple but also astute; skilful workers who facilitate the flow of water"*.

Isidoro M^a ANGUIA, from Huerta, opened the first session by thanking the house that is hosting the Regional Conference and greeting all the participants. M^a de los Ángeles DE FRUTOS, abbess and president of the Cistercian Congregation of St. Bernard (=CCSB) said that she was grateful to God for having the participants with them and happy that the RE Las Huelgas could be held, for which they had prepared everything with great affection and enthusiasm.

Fr. Isidoro then welcomed the new members of this EN, and those superiors who have changed or taken over communities where they exercise their service, which are: the M. Carmen Jesús SERRANO, abbess of La Palma; Fr. Juan M^a DE LA TORRE, local superior of Oseira, and Mr. Marco Antonio MALDONADO, counsellor to the Abbot General (=AG), invited by the RE.

Fr. Isidoro thanked Fr. Bernardus PEETERS, AG for his presence, who responded by saying that he was very happy to be in the EN after visiting the houses in Galicia, which gave him a lot of energy.

As for absences, Fr. Isidoro pointed out that M. Esther MUÑOZ, abbess of Arévalo, could not come due to health problems. Esther MUÑOZ, abbess of Arévalo, was unable to attend due to health problems; and M^a Luisa GÓMEZ, superior of Ávila, who was unable to attend so as not to leave the sisters alone, as there are few of them in the community. The members of the RE who have died since the last meeting were also remembered: Fr. Salvador, from Sobrado; Fr. Severino, from Huerta; Fr. P. Doroteo Pio, of Viaceli; M. Maria BORRELL, of Vico.

Unanimously, Mr Marco Antonio MALDONADO, member of the GA, was given the right to vote.

I. TOPICS SPECIFIC TO THE GENERAL CHAPTER

1. EVALUATION OF THE GENERAL CHAPTER (PART 2)

The evaluation began by assessing the dynamics of the GC. It was noted that the new voting system helped and facilitated a lot, although it lacks confidentiality. Some asked that the functioning of the dialogues in the assembly could be improved by means of a chat or similar system projected on the screen of the assembly with the questions or opinions, thus giving more people a voice without wasting so much time. However, some were not in favour of this system because it could make it difficult to follow the topics carefully. Likewise, the Coordination Commission should manage the dialogues well, avoiding that the interventions are too long.

The liturgy is getting better and better and the venue is acceptable. It was proposed that both the opening and closing Eucharist of the GC could be transmitted via internet so that all the communities who want to be "present" can be present regardless of the time zone.

The GC venue, Domus Pacis, meets the necessary conditions, but the participants who had to stay in the hotel were not well, so it would be desirable that all could be accommodated in the Domus Pacis and Gesù Bambino. On the other hand, the rest days and the free Sunday afternoon are fine.

It was also pointed out that the panel that was prepared by the GC was a bit lacklustre and it would have to be assessed whether it was suitable for the GC. As for the lectures given through the Zoom platform, some were so long and were given so quickly that it was very difficult to follow them, including the technical specificity of some of the topics covered. It would be good to assess the timeliness of the lectures at the GC.

With regard to the Mixed Commissions (=CMix), some think that it would be good to renew them, proposing that they should not be composed by languages but mixed, although technically it would be more difficult. But there are also disadvantages due not only to language but also to the different cultures, which can lead to a lack of understanding and a lack of being able to go into depth on the subjects dealt with.

The addition of professional translators to the GC has helped to improve the quality of the GC. Although there were difficulties in finding translators for the CMix when people from a language other than that of the CMix were invited.

Some participants pointed out the importance of having the Law Commission present during the GC, as the last GCs have been special because they have dealt with so many Constitutions (=CST) and new Statutes (=EST).

Regarding the treatment of special cases or communities, there were complaints that some were not treated confidentially and adequately in the room. It could be recommended that before a particular issue is discussed, be it an abbot or a community, there should first be a dialogue with the Immediate Father (=PI), or with the persons involved, so that during the assembly there is no "out of place" discussion, as this creates uneasiness in the assembly, leading to complaints of lack of confidentiality and charity in some situations. Situations that can be avoided by speaking clearly and appropriately before discussing the issue in the assembly. In any case, the GC is a body where if things are communicated it has to be the reality of things.

There is only a three-year gap between one GC and the next, which is a short time, so some propose holding GCs at least every four years.

Finally, it was requested that the GC chronicles sent to the communities be a little more developed and continuous.

The following votes were taken from the above:

VOTE 1: We would like the opening and closing Eucharist of the GC to be broadcast online, if possible, so that only the communities can participate.

YES: 21NO : 0 ABS: 0 **UNANIMITY**

VOTE 2: We would like to see the possibility of participation in the GC classroom via chat during the dialogues being considered.

SI: 17NO : 4 ABS: 0 **PROPOSAL ACCEPTED**

VOTE 3: We would like to limit the speaking time of the participants in the dialogues in the GC classroom.

SI: 19NO : 0 ABS: 2 **PROPOSAL ACCEPTED**

VOTE 4: We wish that the number of lectures given at the GC be limited as much as possible.

SI: 19NO : 0 ABS: 2 **PROPOSAL ACCEPTED**

2. GENERAL CHAPTER COMMISSIONS

The discussion and the contributions of the participants revolved around two key issues. On the one hand, the possibility that the CMix could be composed of members from different languages and cultures, as already pointed out in the evaluation of GC 2022. In contrast to the richness and breadth of vision that this option could have, the difficulty of making oneself understood by using different languages in communications as well as different cultural sensitivities was pointed out as an issue to be taken into account. One of the participants proposed that for the next GC one or two *ad experimentum* commissions should be made up of members from two different languages, and to make a subsequent evaluation to see if it would be feasible to do so in all the GC's CMix.

The other question centred on whether the reports of the houses should always be studied by the same CMix, in each GC, or whether this commission should be changed with a certain periodicity. In this regard, Mr. Marco Antonio, AG councillor, pointed out that the assignment of the reports to other CMix was already done in the GC of 2022 and that, in any case, if a community wants its report to be studied by another CMix, it

can request it.

without any inconvenience.

3. HOUSE REPORTS

In the assembly's dialogue on the proposed theme, the participants' interventions focused on two points. On the one hand, the way in which the reports of the houses are drawn up and, on the other hand, the objectivity and veracity of the reports, together with the need or not to incorporate other informative elements such as the Visiting Letter.

Regarding the preparation of the reports of the houses, the great majority of the speakers preferred that questions be asked, to guide the preparation of the report, and not that a topic be proposed by the Central Commission (=CC) which prepares the next GC. Some suggested adding some data on the economy, work and the general situation of the community to the statistics.

With regard to the issue of the objectivity and veracity of the reports, attention was paid firstly to the question of who was producing them: the whole community or just the superior. Secondly, there was a certain tendency to "sweeten" the reports in order to portray a certain image to the GC. For this reason, some of the participants proposed that in the CMs, together with the respective report of the house under study, the last Visiting Letter (=CV) made by the IP should also be available.

The following votes were taken from the above:

VOTE 5: We would like to see the drafting of house reports asking questions that are geared towards expressing the reality of the community.

YES: 21NO : 0 ABS: 0 **UNANIMITY**

VOTE 6: We would like the Commissions studying the reports of the houses to have the latest Letter of Visitation of these communities.

SI: 20NO : 1 ABS: 0 **PROPOSAL ACCEPTED**

4. REGIONAL REPORT

The dialogue held in the assembly on the proposed theme and after various interventions, the following conclusions were reached:

- Maintain the production of Regional Reports (=IR) for the GC.

- Give indications or guidelines for conducting the IR, which help to reflect the situation in the Region.
- IRs should only be discussed in the GC assembly and not in the MCs.
- The need to train new capitulants on the different procedures and functioning of the GC.

The following votes were taken from the above:

VOTE 7: We want the Regional Reports to be carried out with guidelines that help to reflect the situation in the Region.

YES: 21 NO : 0 ABS: 0 **UNANIMITY**

VOTE 8: We want the Regional Report to be studied only in the assembly.

SI: 19 NO : 0 ABS: 2 **PROPOSAL ACCEPTED**

VOTE 9: We would like new participants in the GC and capitulants who so wish to receive information about the rules of the GC prior to the GC.

SI: 19 NO : 0 ABS: 2 **PROPOSAL ACCEPTED**

5. COMMON NOVITIATES

The theme is presented by M. Pilar GERMAN, from Tulebras. Pilar GERMAN, from Tulebras (see appendix i, p. 41 ff.).

It was then clarified that the common novitiate and the inter-novitiate are not mutually exclusive. It was also noted that it was difficult to set up a common novitiate, because of the lack of novice masters and because of the difficulties of doing without candidates for two years.

6. IMMEDIATE MOTHERS AND DOCUMENT SUBMITTED BY THE LAW COMMISSION

The theme is presented by M. Ana MONEO, from Armenteira. Ana MONEO, from Armenteira (see appendix ii, p. 44 ff.).

This was followed by a dialogue and discussion on whether an Immediate Mother (=MI) can preside at a solemn profession and the role of the IP in such a profession. On the one hand, it was clarified that a distinction must be made between the presider of the Eucharist

and the one who receives the vows. A profession is public because the vows are received by an ecclesiastical authority, and the abbess is a public authority.

ecclesiastical. On the other hand, it is also pointed out that the presence of the IP is a function of the bond of filiation, when the linking of a monastery of nuns to the Order was done through the IP. But now this link is made through the abbess.

Immediately a dialogue in groups took place with the following question: Do we wish to implement the figure of the IM in our Constitutions and make the appropriate changes in the Constitutions concerned?

The groups reached the following conclusions:

All agreed to create the figure of Immediate Mother for houses of nuns (it seems that there would be no legal inconvenience for abbesses to be IM in daughter houses) and thus begin the evaluation of the figure of IM for houses of monks. There are already precedents of MI in monastic houses, motivated by the extreme precariousness of some regions, where they have been appointed as delegates by the Abbot General.

With regard to other functions, the following analysis was carried out:

VACANT SEAT

In practice, monks and nuns function in the same way. Although the Const. of monks says that it is the IP who is in charge, it is the local Prior who remains in charge of the community during the time of "sede vacante". It would be good to equalise the legislation.

VACANT SEAT WITH DAUGHTER HOUSES

If the conventual prior remains in charge and the time "sede vacante" is contemplated to be no more than 3 months... something very serious must be happening in the daughter house for it not to be able to wait until the seat is filled. In case of urgent need, it could be for the IP/IM.

The IP in the abbot's election.

The presidency in an election is not linked to the presbyteral service, so I could still preside over an IM.

PASSIVE VOICE IN THE ABBATIAL ELECTION

We believe that logic must be used.

Male superiors of daughter houses can only be elected in their mother house if they have IP and not if they have MI.

As for the superiors, with the current legislation (without MI), they can never be elected in another female monastery, although it will be their founding house. Nor can they vote in the election of their IPs.

In the case of MI, legislation should be similar between nuns and monks.

In the case of nuns having IP, they should have the same right as the superiors of the male daughter houses to choose their IP.

REGULAR VISITS

It seems to be more difficult for nuns than for monks to have a female visitor. In the current legislation she can only be a co-visitor.

In current IM cases they have "rights" to access, albeit on a delegated basis.

We see no objection to an IM doing the RV to its daughter houses.

CHAPLAIN TO NUNS

The mission of the IP is to provide a chaplain to his daughter house of nuns, the same can be done by an MI.

The following votes were taken:

VOTE 13: We wish that in C. 74.3 of the nuns, the obligation for the Immediate Father to preside at solemn profession be abolished and be put on a par with the constitutions of the monks.

YES: 21NO : 0 ABS: 0 **UNANIMITY**

VOTE 14: We wish that in the C. 57 of the nuns, the mention of the Immediate Father in the certificate of profession be suppressed and be put on a par with the constitutions of the monks.

YES: 21NO : 0 ABS: 0 **UNANIMITY**

VOTE 15: We want the figure of Immediate Mothers to be included in our constitutions.

SI: 20NO : 1 ABS: 0 **PROPOSAL ACCEPTED**

7. REVIEW OF MALE AND FEMALE CONSTITUTIONS

Isidoro M^a ANGUITA, of Huerta, presented the topic, indicating that practically everything is already equal except what is not allowed in *Cor orans* (=CO). He also pointed out that there are some phrases, of little legislative weight, which appear in some constitutions and not in others, but that they can be equalised without any major problem. But there are two statutes that have a little more depth. The first is Constitution 39.1.

CONSTITUTION OF MONKS	CONSTITUTION OF NUNS
<p>C. 39 The election of the Abbot 1 In the daughter house devoid of Abbot, the Immediate Father takes charge of everything.</p>	<p>C. 39 The election of the Abbess 1 The prioress assumes the government of the vacant monastery; however, she is not to make any changes or important decisions except for a grave and urgent cause. In this case she is strictly obliged to hear the Conventual Chapter, and, if she can, the Immediate Father.</p>

The other Statute that really caught my attention is 39.4.

CONSTITUTION OF MONKS	CONSTITUTION OF NUNS
<p>Est. 39.4. When two thirds of the Conventual Chapter so desire, it may elect an Abbot for a definite term of six years. In the following elections, as long as the community does not return to the system of abbey mandate for an indefinite period, an absolute majority of the votes is sufficient for the Conventual Chapter to elect an Abbot for a definite period of six years. Abbot for a definite term of six years.</p>	<p>Est. 39.4. When the absolute majority of the Conventual Chapter so desires, the Chapter may elect an Abbess for a definite term of six years.</p>

These are the two statutes that could be equated if they wanted to be.

The debate centred on the possibility that also in the constitutions of the monks it should be stipulated that the prior of the house with a vacant see should take charge of everything until a new superior is in place.

The following votes were taken from the above:

VOTE 11: We wish that the wording of statute 39.1. for monks be brought into line with that of nuns.

SI: 20NO : 1 ABS: 0 **PROPOSAL ACCEPTED**

VOTE 12: We wish to bring the wording of statute 39.4.A for monks into line with that of nuns.

SI: 20NO : 1 ABS: 0 **PROPOSAL ACCEPTED**

8. STATUS OF THE CONSTITUTIONS ACCORDING TO THE VOTES OF GC 2022 AND THE DIVCSVA'S RESPONSE.

Juan José DOMINGO, from San Isidro (see appendix iii, p. 56 ff.).

The next step was to clarify the doubts that had arisen during the presentation of the topic. These were related to the distinction between papal and constitutional enclosure and which one affects the nuns of the Order. On the other hand, questions were asked about the meaning of the Est.

39.2.c and when the conventual chapter loses the right of election; and finally what is meant by prolonged absence of less than one year.

The issue of non-priest superiors was also discussed. The need was seen for specific legislation to be incorporated into our law, in which it will be expressly indicated who can be a major superior priest and what functions he can exercise in the performance of his ministry.

The following vote was taken on the basis of the above:

VOTE 10: We wish to implement the papal rescript on the possibility of a non-cleric being a major superior of an institute of pontifical right, published on 18 May 2022, with a view to having it included in our constitutions.

SI: 19NO : 2 ABS: 0 **PROPOSAL ACCEPTED**

9. STATUTE OF ACCOMPANIMENT FOR FRAGILE COMMUNITIES: "AFFILIATION".

Juan José DOMINGO, from San Isidro (see appendix iv, p. 73 ff.).

The meeting then proceeded to clarify the doubts that had arisen during the presentation of the subject. The following votes were taken from all that was said:

VOTE 18: After having studied the figure of affiliation in our Region, we wish that it be definitively maintained in our legislation for both monks and nuns.

SI: 19NO : 0 ABS: 0 **UNANIMOUS**

VOTE 19: We would like the figure of affiliation to be presented in the GC on the basis of the document presented by Mr. Juan José Domingo in the EN.

SI: 19NO : 0 ABS: 0 **UNANIMOUS**

10. ECONOMIC VISIT OF AN EXPERT BEFORE THE REGULAR VISIT AND BEFORE CG 2025.

Isidoro M^a ANGUITA, from Huerta (see appendix v, p. 80 ff.).

This was followed by the clarification of doubts about the limits of the amounts that can be spent and the necessary consultations and consents; as well as the carrying out of an audit of the community's economy.

11. RENEWAL OF THE ORDER'S FINANCIAL STRUCTURES

Isidoro M^a ANGUIA, from Huerta (see appendix vi, p. 94 ff.) The appropriate clarifications are made.

II. THE ISSUES SPECIFIC TO THE RE

1. ANTI-ABUSE PROTOCOL

Antonio M^a Martín, from Zenarruza (see appendix vii, page 104 and following).

The dialogue begins with a request for information on where the protocol adopted by each community should be publicly displayed. It should also be available in the infirmary. On the other hand, the question of the protocol in relation to the Internovitiate and PREM was also raised. Finally, the regulation of places for accompaniment was also seen as something to be taken into account.

The following vote was taken on the basis of the foregoing:

VOTE 20: We instruct the Formation Secretariat to revise and implement the PREM regulations concerning prevention, action and sanctions with regard to abuses, which can also be used in the Internovitiate.

SI: 19NO : 0 ABS: 0 **UNANIMITY**

2. ELECTIONS OF THE RE

They have been chosen:

COORDINATION COMMISSION:

Roberto de la IGLESIA, from Cardeña VICE CHAIRPERSON:

M. Pilar GERMÁN, from Tulebras MODERATOR: M. Carmen

Jesús SERRANO, from La Palma

TRAINING SECRETARIAT:

ABAD COORDINATOR: Fr. Isidoro M^a ANGUITA, from Huerta

SECRETARY FOR TRAINING: Fr. Carlos M^a ANTUNES, from Sobrado

MALE SPOKESMAN: Brother Christian M. CASTILLA, from San Isidro

FEMALE SPOKESMAN: Sister Maritza LAYANA, from Tulebras

VOCAL CCSB: Sr. Rosa Ana IZQUIERDO, of San Bernardo (Burgos) (Proposed by M. Angelines de FRUTOS, Abbess President of the CCSB)

PUBLICATIONS COMMISSION:

ABBESS COORDINATOR: M. Isabel RIVERO, de Vico

PRESIDENT: Fr. Miguel M^a VILA, from San Isidro

MALE VOCAL: Fr. Enrique TRIGUEROS, from San Isidro

FEMALE VOCAL: Sr. Maria TELLEZ, from VICO

VOCAL CCSB: Sr. Rocío LUQUE, from Villamayor (Proposed by M. Angelines de FRUTOS, Abbess President of the CCSB)

COMMISSION FOR VOCATIONAL DYNAMISATION AND TRANSMISSION OF THE

CHARISM: ABBESS COORDINATOR: M. Pilar GERMÁN, of Tulebras

PRESIDENT: Fr. José Luis GALIANA, from Cardeña

MALE VOCAL: Br. Rafael ESCOBAR, from Sobrado

FEMALE VOCAL: Sr. Paula TÉLLEZ, from Armenteira

CCSB VOCAL: Sr. Melissa RESTREPO, from Benavente (Proposed by M. Angelines de FRUTOS, Abbess President of the CCSB)

LITURGY COMMISSION:

MALE VOCAL: Br. César, from Oseira

3. REPORTS FROM THE COORDINATING ABBOTS AND ABBESSES.

3.1. Training Secretariat

Roberto de la IGLESIA, from Cardeña, presented the report.

REPORT OF THE TRAINING SECRETARIAT

Report for the Regional Conference : 12-17 March 2024 : Las Huelgas

Training Secretariat

The Formation Secretariat is made up of the secretary, Carlos M^a, de Sobrado, and the members:

Paula, from Armenteira; Rosa Ana, from San Bernardo de Burgos, and Christian, from San Isidro.

Since the last SR, the Secretariat held its annual meeting on 13-14 June 2023, in La Palma. The Abbot coordinator of formation, Roberto, from Cardeña, participated in the annual meeting and accompanies the activity of the Secretariat.

The secretary was invited to participate in the General Chapter of the CCSB in September 2023, which is very positive. Being able to speak directly with all the abbesses, who are the superiors of the majority of the students at the Study Centre, has made it possible to clarify procedures and to motivate them for the importance of this formative stage in the life of the juniors.

CEM (Centre for the Study of the Monasticate)

On 28 June 2022, two days after the end of the Regional Conference in Tulebras, the then Congregation for Catholic Education approved the Statutes of our Study Centre and the renewal of the affiliation to the Faculty of Theology of the University San Dámaso for a five-year period. The significant change is that

membership is no longer exclusively for the male branch, but is now extended to all members of the Order, of the Congregation and to any member of another monastic Order that we decide to welcome in our Study Centre.

Since the last Regional Conference, three workshops have been held: in Sobrado (October 2022), in Las Huelgas (April/May 2023) and in Cardeña (October 2023). The number of students has slightly decreased. For the next cursillo (April, in La Oliva) 29 students are enrolled: 25 nuns (20 from the CCSB and 5 from the OCSO) and 4 monks (OCSO). There are 6 students who are auditors. Of the 23 ordinary and extraordinary students, 15 are up to date or a little behind. The group is very heterogeneous in terms of ability and interest in studies, but the students and teachers take great care to ensure that everyone feels integrated. The atmosphere is healthy, calm and there is a good relationship.

Starting with the Cardeña course (October 2023), with the aim of accompanying students more closely throughout the semester, we have established two online classes (tutorials) for the four core subjects in each semester, with a monthly rhythm (one subject per month). In this way, we begin to put into practice what is already present in our official curriculum, where several credits correspond to tutorials. Before implementing this practice, the abbot coordinator and the secretary of formation presented the proposal to the president of the SR and the abbess president of the CCSB, who expressed their agreement and support.

Since June 2022, 3 male students have taken the examination for the Bachelor of Theology and passed with good marks. There are good prospects that in 2025 the nuns will inaugurate the possibility, opened with the last renewal of membership, to sit the examination as students of our Study Centre. We can and must all contribute to progressively make the Bachelor of Theology examination the normal conclusion of our curriculum.

We are still lacking teachers in different areas of theology. Some of the students who are taking or will be taking the Baccalaureate examination have more than enough academic qualifications to continue their studies in the second degree. As the Study Centre is at the service of the whole Region and of the CCSB, it would make sense that the question of the formation of future teachers be considered by all the superiors gathered together and supported by the SR and the CCSB, without, of course, calling into question the autonomy of each house. In this area too, inter-assistance could be very beneficial.

Novice masters' course

Culture of good treatment and prevention of abuses in formation: Practice good zeal with the most ardent love (RB 72,3) - is the theme of this year's course for novice masters, which will be given by Antonio Carrón de la Torre, OAR, professor at the Institute of Anthropology of the Gregorian University, from July 1 to 6, at the monastery of San Isidro. The issue of abuses was addressed at GC 2022, where a new Constitution on this matter was approved and a paragraph was added to the *Ratio Institutionis*, insisting on the need to provide formation to all members of the Order. Abuses (spiritual, power, sexual) are a fundamental issue for the formation of formators.

Ongoing community training (online)

As a continuation of the training on the **Cistercian heritage**, in November 2022 and February 2023, we are holding a course on William of Saint-Thierry, given by Juan M^a de la Torre. One of the fruits of this course is an excellent book by Juan M^a: *William of Saint-Thierry: Itinerant Enlightener of Love*.

In November 2023 we are holding a course on Isaac of the Star, given by Dom Elias Deitz, Abbot of Gethsemani.

Ana Laura from Hinojo has already agreed to give us a course on St. Gertrude in November 2024. The programme has not yet been defined.

This year, in January and February, we held a **theological-spiritual formation** course with the theologian Margarita Saldaña, with the theme: *Inhabited Routine - Illuminating our daily life through the daily life of Jesus*. The objectives of this training were: a) to deepen the meaning of daily life as a place of human and spiritual fulfilment; b) to rediscover the Christological anchorage of Christian daily life; c) to question one's own experience of daily life within the monastic vocation. Several communities expressed their gratitude for this training.

This year, both in the cursillo on Isaac of the Star and in this last one on the "Inhabited Routine", the participation of the communities was a little lower. We know that some communities attend the workshops on a deferred basis, although we do not know how many do so. Some REMILA communities also take advantage of these trainings. It would be interesting for the Regional Conference to make an evaluation of these training proposals and, if it wishes, to make suggestions for future topics.

Health care training (online)

In January 2023, professionals from the Hospital de los Hermanos de San Juan de Dios in Granada gave us training called "Escuela de Cuidadores". The following topics were presented in 4 sessions: Introduction to care, The role of the caregiver, Skills and knowledge for care (nursing, physiotherapy, occupational therapy), Self-care and social resources. Participation in this training was open to other communities of contemplative life in Spain. Around 60 communities participated.

A Training in Psychogeriatrics: *Course on mental disorders in the elderly* is already scheduled for next May. This time, the trainers are professionals from the Hospitals of the Sisters Hospitalers. The syllabus has already been defined and will be given in 8 sessions of 2 hours. The final programme will be sent to the superiors shortly.

Cora

Taking into account Constitution 58 (Ongoing Formation), modified by GC 2022 and approved by the Holy See, in which the addition was introduced: "Accompaniment is provided for the newly solemnly professed during this time of particular vocational maturation", we have reconsidered the realisation of CORA (formation meeting for young solemnly professed). A convocation was made in 2021, but it did not take place in 2021.

was not possible due to the low number of registrations. If there is interest from the communities, this training will be offered again.

Appropriate clarifications are made.

3.2. Liturgy Commission.

The report was presented by M. Ana MONEO, from Armenteira.

LITURGY COMMISSION

After the last SR of Tulebras, and by mandate of Fr General, we met in July 2022 and in the same monastery of Tulebras, Br Presen and Br José Luis to fulfil what was requested.

General was sent (08/07/2022) the matters on which we believed the "Liturgy Commission of the Order", which was to emerge from the following General Chapter, should work, as well as the work already carried out by this commission over the years, in which he showed great interest. And, on the same date, both to Fr. General and to Dom Anastasius the prayers pending approval by the Dicastery for Divine Worship and the Discipline of the Sacraments.

Little more was known about the one and the other... little else was known.

The "Roman process" has led to a "formal" halt in the work of the Commission, although we continue to do some things at a lower level.

So we proposed to *get together for formation*. With the approval of our Coordinating Abbess, our respective superiors and the Coordinating Commission of the EN (Cardeña, September 2023), we attended the National Conference on Liturgy organised by the Spanish Episcopal Conference in Madrid from the 24th to the 27th of October last. The theme was "*Liturgical Symbolism*". With first-rate speakers who dealt with: the importance of liturgical symbolism in Desiserio Desiseravi; the Sacramentality of the liturgy (I): Symbolism; the Sacramentality of the liturgy (II): gestures and rites; the main liturgical signs and gestures; understanding in order to participate; other signs and gestures; signs proper to the liturgy; the main liturgical signs and gestures; the importance of the liturgical symbolism in Desiserio Desiseravi: other signs and gestures; signs proper to the celebration of the sacraments; signs proper to the celebration of the sacramentals; liturgical objects; vestments, vestments and other liturgical elements; the symbolism of the building and liturgical spaces; symbols proper to the liturgical year; the biblical foundation of liturgical symbolism; for a pastoral care of liturgical symbolism; round tables and various dialogues. The papers and conferences will be published in the magazine: *Pastoral Litúrgica* de la CEE.

Apart from the possibility of making direct contact with the staff of the Episcopal Commission (its President: José Leonardo Lemos, Bishop of Orense. The attending vocal bishops: Manuel Sánchez Monge, Mons. Ángel Fernández Collado, Mons. Juan Antonio Aznárez, Mons. Ángel Rubio Castro and the Technical Secretary: D.

Ramón Navarro) as well as those responsible for the publications.

(the talks were held at the headquarters of the EEC, the "*Sedes Sapientiae*" building), with whom we will have to speak again when we publish our missal. As well as other professors and delegates of Liturgy from many dioceses and other lay people and religious interested in liturgical themes.

These days are open to the general public, it would be good if more brothers and sisters could take advantage of them.

Even if it is a bit like selling the bear's skin before it is hunted, the "new missal" could be considered in an edition similar to that of the "New Book of the Masses of the Virgin": incorporating the ordinary of the Mass, the appropriate prefaces, the Eucharistic Prayers 1, 2 and 3 and the common Masses of monks and nuns; similar books already existed in other Orders (e.g. Augustinians or Dominicans).

We would like to receive some news about the progress of the work of the "New Liturgy Commission of the Order".

In ardent expectation of the Roman approvals and always at your service...

Appropriate clarifications are made.

Fr. José Luis GALIANA informed the assembly that the Liturgy Commission has an email address available to the communities: comisionliturgiare@gmail.com

3.3 Music Commission

The report was presented by M. Encarnación LLUCH, from Benaguacil.

REPORT OF THE MUSIC COMMISSION OF THE RE

In 2019 the Music Commission completed the work of composing the elements of the Liturgy of the Hours. Since 2016 the Commission musicalised antiphons to complete the repertoire of OCM and antiphonaries, these have been:

- Antiphons for psalms susceptible to division.
- Lenten antiphons without "alleluia" for the Lenten season
- Antiphons for the common offices
- Antiphons for the memorials that have their own
- Antiphons for the Fairs of the Easter Season

The repertoire of hymns has been expanded with new compositions and with the compilation of materials contributed by the monasteries of the EN and the CCSB.

In August 2017 it was decided to set the entrance and communion antiphons of the Missal to music, taking up the initiative of the commission already expressed at the meeting held in San Pedro de Cardeña in 2007.

This work began in 2022. We have already set to music the Sundays of Advent and the solemnities and feasts of Christmas with the saints' calendar of the season. In May, God willing, we will continue with the Sundays of Lent and Holy Week.

The entrance and communion antiphons already sung in some monasteries are being added to the new compositions, with only a few words changed by the new translation. For most of the antiphons, two versions are being left so that communities can choose the one that best suits their own possibilities.

This material is entirely optional, as it is possible to sing the text of the Missal or any other chant. We would like to emphasise what Oscar Valado, head of music for the CEE Liturgy Commission, says: "singing the Liturgy is not the same as singing in the Liturgy", singing the Liturgy is singing the proper texts and singing in the Liturgy is singing any other chant.

It is a desire of the commission to provide music for the high times, solemnities and feasts, which we hope to carry out even with the limitations we have. At the moment there are 4 members and we are grateful for the generous collaboration of Fr. Juan José Domingo who continues to contribute compositions.

With the sad passing away of M. Gema, there is one member missing for the commission to be elected.

We see the difficulty of finding qualified brothers for the commission, and we regret that music studies are not more valued in the communities, bearing in mind that in the intern novitiates music does not even appear as a "maria" in the curriculum, even though we spend the whole day singing and most of the members of the communities learn everything by ear because they do not know how to read a score.

Appropriate clarifications are made.

3.4. Publications Commission and *Cistercium*

The report was presented by M. Isabel RIVERO, from Vico.

PUBLICATIONS COMMISSION

The Publications Commission in its section of the Cistercian Library has met three times since the last meeting of the R.E. The first was on 3 August 2022 in the monastery of Villamayor de los Montes; the second time on 5 September 2023 in the monastery of Nuestra Señora de Vico; the third and last time through the Zoom platform on 9 March 2024. Guillermo de Cardeña; Fr. Enrique Trigueros from San Isidro de Dueñas; Sister Rocío de Villamayor; Mother Isabel de Vico; Sister María de Vico and Brother Miguel María from San Isidro de Dueñas took part in this last meeting. In addition, there were

Joaquín de San Isidro de Dueñas and Antonio García Flores were present.

Following these meetings, the first thing we would like to present to you are three more urgent proposals for the renewal of the Commission:

-We propose that Mother Isabel, Abbess of Our Lady of Vico, be the Abbess in charge of the Publications Commission.

- We also propose that Sister María de Vico replace Mother M^a Carmen Echegaray on the Commission, as this sister is currently exclaustated.

Once these proposals have been presented, we have made an economic analysis with the data presented by Brother Guillermo from the Revista Cistercium as well as from the Cistercian Library, as Brother Guillermo will explain in detail.

After reading the minutes of the previous meeting we made an update of the projects. Although 2023 has been poor in terms of book publishing, it has been very advantageous to resume pending work and to restructure better and in a real way the agenda of the next publications. Nevertheless, there has been a lot of work to prepare the next editions.

We had planned to publish a book on San Rafael Arnáiz, it was a dissertation that was going to be suitable for a book, but the author has enrolled to do her doctorate and until she finishes this she cannot publish anything of what will be her thesis work, as is the norm for this type of work. So we cancelled this edition, which was to be presented in January.

We have had several contacts with Erik Varden, he was upset about the translation of the book we had published and asked us for explanations about the next translation and about the translator. We know that some publishing professional exaggerated certain errors in the translation and style in order to keep the patent for his books in Spanish etc... After this first contact, we were able to work with him and come to an agreement, he has always been helpful, cordial and attentive, the only thing he wants, legitimately, is to revise the translation of the next book, for which he has commissioned a man he trusts to revise the translations of his works in Spanish. This has delayed its publication, we are still waiting, but we suppose that by the end of the year we will have the book on our shelves.

A book by Cardinal Bona, a 17th century Cistercian, is about to be published, it is a beautiful book and we believe that it will be very well published. It has been translated by a lay Dominican of the Third Order, and he has proposed to us to continue translating works by the same author, to which we are open. He is a great connoisseur of Latin and writes in Spanish with great elegance.

Fr. Enrique has taken up the correction and translation of Charles Dumont's book, the last of the trilogy of which we have already published two books (*On the Road to Peace* and *The Burning Wisdom*), which we hope will be published by 2025. In addition, this year Fr. Tomás and Fr. Enrique have worked, one as translator and the other as translator.

as proofreader, the translation of a voluminous collection of sermons by St. Alfred, we are grateful for the hard work of both of them, especially knowing the state of health of both of them, whom I try to look after as well as possible so that they can continue to work with us.

Fr Roberto is translating a very interesting work by Michael Casey, *Stranges to the City*, on the Rule of St Benedict. We don't know when it will be ready, but once translated it will take priority over other works because of the contract with the publisher. It has been a lot of work to get permissions with this book...Michael Casey has wanted to make everything easy for us, but in the small print of the contract with the publisher, in his own words, "as Esau sold his birthright". We hope to see this book on our shelves soon, which will be very useful for the formation of monks and people who drink from our spirituality, as lay Cistercians and Benedictine Oblates.

Finally, we have translated two works by Galand de Reigny, they are in the correction and preparation phase, as they do not need permissions and are not conditioned by contracts, their publication is a lower priority. Now we have to see if we publish them together or separately, there are different options and different points of view.

In addition to these works we have to add the demanding work of Fr. Francisco Rafael for translating the Vita Prima of St. Bernard, he has sought the best critical edition and after having done a course in the Anselmianum he has made an introduction. We have been considering whether to publish this work in the Cistercian Library, but we believe that it is more appropriate for this work to be published together with the Complete Works of the B.A.C. The work has already been presented and we are awaiting your response.

Thanks be to God the road is quite well worked out and practically until 2026 we have the agenda set, but this route of work is variable and flexible. We are combining the work of publications with community work and prayer, sometimes one is surprised with the phone in one hand and the showerhead in the other, arranging the publication of a book while shaving a brother with the other hand, but I think we all do it with joy. We thank you for your attention.

CISTERCIUM

The following issues were discussed:

- **Editorial Board.** From the beginning of the new editorial team, we wanted all the members of the Cistercian family to be represented. It was not difficult to find monks from the OCSO and the O.Cist who wanted to help us, as well as a member of the Benedictine Order. After a couple of frustrated attempts, and thanks to the invaluable help of M. Angelines de Frutos, we now have a representative of the Cistercian Congregation of St. Bernard (CCSB), M^a Fernanda Solís, assisted by Sr. Yurani L. Garnica, both from the monastery.

del Salvador de Benavente (Zamora). We are still missing a representative of the Congregation of Castilla (O. Cist).

- **New sections** in the magazine:

- **Cistercian Heritage**, to present different aspects of Cistercian history through or based on the image of a piece of the Order's heritage in Spain, preferably from 'living' monasteries: from a reliquary, a painting, the furniture of an archive, the cover of a tumbo, the seal of an abbot or abbess, a choir or study book, etc. . The aim is that the readers, especially the communities, get to know and learn to value their heritage. It is another way of achieving one of the main objectives of the magazine, to serve as a vehicle for education. Last issue we began with a small study of the Carrizo chest and the Easter sepulchres, in this next issue we will deal with stained glass windows in medieval constructions through examples from Las Huelgas de Burgos and Huerta, and in the following issue we will dedicate it to the royal patronage of the monasteries, exemplified by the images of the founding monarchs in the sepulchres of Las Huelgas de Burgos and Valladolid.

- **Cistercian Archives**, to publish important documentary sources for the study of the Order as a whole or of a specific monastery. We want to recover a tradition of the magazine and try to make it present in every issue. We have already made progress on how we want to set up this section, and we hope to launch it for the second issue of this year.

- **Formation of the communities of the Cistercian family**. Although it does not yet have a definite title, we would like to present in this section a sort of chronicle of what is being done in the different monasteries with a view to their integral formation (spiritual exercises, courses, participation in conferences or congresses). This is a subject that we have discussed in the various meetings we have held so far, although we have never been able to define how to approach it. A meeting has been pending in which the monks and nuns who form part of the Council will meet with the management team in order to deal monographically with this subject, share ideas and make proposals.

- In our task of **increasing the visibility and reputation of the journal** in the scientific and academic world, some formal details are being included that will help us to be included in more databases and specialised portals and thus be more accessible to researchers and potential authors. We are currently listed in Latindex, MIAR and Dialnet. In addition to recovering the bibliographic masthead in each article, we have incorporated abstracts and keywords in Spanish and English and in this next issue we will include at the end of each article, a section with the bibliography used.

The profile we have opened on academia.edu receives numerous visits, and that is something that also helps to give us visibility, as does the *Cistercium* website.

- **Declining subscriptions.** Several factors have to be taken into account:

- communities that have disappeared
- subscribers who have passed away
- cancellation of a large number of exchanges that took place in each monastery.
- academic institutions that prefer electronic publications.

- **Publication of the proceedings of the Colloquium on the martyrs of Algeria** held in early December last year at the University of Comillas in Madrid. After contacting Marie-Dominique Minassian, from the scientific committee *Les écrits de Tibhirine*, and talking to her personally during one of the days of the Colloquium, they confirmed that *Cistercium* could publish all the papers in Spanish. In principle we were going to include them in the first issue of the year, but at the end of January we were informed that, due to a commitment with the funding entity, the proceedings must first be published in French, which will be done at the end of August or more probably in September, and that we cannot publish them in Spanish until after that date. So we have had no choice but to include the proceedings in the second issue of 2024.

- **The need for monks and nuns to get involved and collaborate** with the magazine. Although it may not seem like it, the truth is that we are not inundated with articles to be published, especially on monastic spirituality. Both lay and monastic members of the editorial team and editorial board strive to prepare studies or reviews, but this cannot be the norm. It is not "our" magazine, it is "everyone's" magazine. We have tried to encourage other monks and nuns to participate, and we have had some of them review books for us. But we need articles. In our communities there are very educated people, but some have a lot of work, others don't know how, and some simply don't want to or don't feel like it. We should consider the possibility of having abbots and abbesses turn the monastic conferences and talks they give in their communities into articles, as well as those who give retreats both inside and outside their houses. It is not a question of scientific studies or doctoral theses, but of simple articles on monastic life, its values, etc.... We need texts which nourish the readers spiritually, and which also contribute to their formation.

Appropriate clarifications are made at the assembly.

3.5. WELFARE MONASTERY

The report was presented by Fr Isidoro M^a ANGUIA, from Huerta.

CARE MONASTERY REPORT

At present there are 25 people (20 nuns and 5 monks). Sr Claire will soon be leaving as Novice Mistress of Nazareth. The average age, excluding Brother Michelangelo and Sr. Claire, is 85 years. Since the opening of the MA there are and have been 40 people (15 deceased), from 20 monasteries and 5 countries. Three of the resident monasteries have already closed.

- Management and challenges from 2013 to 2023:
 - Pensions have increased by 15%, while wages in MA have increased by 60-70%.
 - We have gone from 3 employees to 8 + substitutions and one has been on sick leave for 9 months (with payment of social security contributions by us). Weekly hours have been reduced and salaries have been increased.
 - More insurance of various kinds.
 - There are older people who are more dependent.
 - All costs for hospital accompaniment are being covered.
 - Dependency assistance has been applied for.
 - We encourage volunteering.
 - Photovoltaic panels have been installed (the MA has not paid anything), which has reduced the cost of electricity from 30% to 50% (electricity, air conditioning, DHW), which had risen sharply.
 - Need to change the air-conditioning system on the 2nd and 3rd floors (28 rooms). Winter 22-23 and summer 2023 were without air-conditioning... We had to borrow the money by advancing the money already requested from the OCSO Aid Fund and received three days ago, as we could not allow the brothers and sisters to spend the winter in the cold.
 - For the normal maintenance of the MA and all the services provided, the following would be required
inject €7,000/month between all of us (such low pensions are no longer sufficient).
How to do it?
 1. Increase the contribution by €400/month per person assisted by the sending monastery. Most pensions are €850/month, while the salaries of female employees are twice as high (including contributions). Those who do not have a monastery because it has closed would have to pay from the common fund or the assets of their closed monastery.
 2. Contribute a sum of money to all monasteries or the Common Fund (RE-CCSB).
 3. Generous contributions from the wealthier monasteries.
 4. Increase revenue with greater use of the MA (including the Montesión monks' area).
 5. Take a serious approach to the management of the monasteries that are closed in order to have a fund to help the MA, training and the most needy monasteries.

What you can't do is do nothing, because then you would have to close down.

Appropriate clarifications were made in the assembly. Fr. Isidoro said, in response to a question from a participant, that the management of the MA was wearing him out. That he needs help and collaboration. This help could come from lay people, but money is needed to be able to hire companies to manage the MA.

The MA situation is discussed in groups and the following conclusions are reached:

- With regard to the contribution of 400 euros per month from the houses that have siblings in the MA, we think that it should be a lower and more flexible figure, especially for houses that have more than one brother or sister.
- The contribution of all the monasteries was a point of discussion, it is thought that perhaps this should not be obligatory for all the houses, there are houses that have not participated in the MA from the beginning. On the other hand there are members who agree to establish a quota.
- It is generally felt that the economic situation of the EN houses is not too buoyant, economies are very tight.
- There is unanimity in thinking that greater use should be made of the MA for meetings of the RE, Internovitiate, offering it to the Diocese as a house of spirituality, etc. Management would be very important for this.
- We consider management support to be very important, probably by hiring a company for this purpose, it would be easier to access subsidies. Processing of aid for dependency, advice on recruitment of personnel, etc.
- Consider the possibility of outsourced management.
- Awareness in the EN that Montesión, although owned by Huerta, is a project for everyone, both in terms of collaboration and the possibility of benefiting from it.
- Possibility of replacing the Chaplain for specific periods.
- Possibility of directing donations or rents from houses and places to the "caja" of Montesión. that we have under-utilised.
- We believe that the Montesión Commission or the Coordination Commission can take charge of the management, trying to free Fr Isidoro a little.

The following votes were taken:

VOTE 16: For the support of the MA each sibling residing in the MA shall pay 100€ to the month.

SI: 18NO : 0 ABS: 3 **PROPOSAL ACCEPTED**

VOTE 17: Each SR and CCSB community will contribute €200, €150 or €100 per month to support the MA, as agreed by each community.

SI: 19NO : 0 ABS: 2 **PROPOSAL ACCEPTED**

3.6. Commission for Vocational Promotion and Transmission of the Charism. The report was presented by Brother Rafael ESCOBAR, from Sobrado.

REPORT OF THE COMMISSION FOR THE DYNAMISATION OF THE CHARISM

The commission met in an online working session on 4 March 2023.

Assistants: Sister Melissa Restrepo (Benavente), Brother Guillermo Imbert (Cardeña), Brother Rafael Escobar (Sobrado).

WORK PLAN:

1. Dialogue on the state of the commission
2. Review proposals made at the previous meeting
3. New proposals

Development:

1. When we started our journey in 2016, a lot of thoughts arose as to how our work as a commission would take shape, given that it was a new challenge for us as a region and we had no experience in this area. Precisely as a result of all this, the work that we presented to the SR in 2022, the statutes, emerged, which shed some light on these questions but which continue to challenge us. So at this meeting we began the dialogue by raising this concern: do we know exactly what this commission should do? What is its purpose? As our dialogue unfolded, we saw how reality often does not match our thoughts.

The little or a lot that we have been doing has been bearing fruit that we did not expect, such as the European Youth Pilgrimage (EYP), where we had no expectations, but rather were reluctant to know where it would lead us. Our surprise was that there was a welcome and interest, not only by the organisers, who in their history had never seen monks participate in this type of activity, who were happy that we could participate in situ and not through videos that do not have the same impact as having a clear message in our own voices. On the other hand, the young people were fascinated by the simple fact of having us present. This has had immediate and future repercussions; immediate because people left with a different view of monastic life to the one they had, somewhat distorted to the reality we live, as well as weaving connections with those in charge of youth ministries, and in the future through our testimony, as they have informed us, because they approach our monasteries through this experience.

2. In the light of this dialogue, we discussed the various proposals we made at the previous meeting as a process of guidance and action: These are the works we proposed:

- **Website:** As we have an inactive domain, www.secisterciense.org, we wanted to give a boost to the transmission of the charism through this medium, which today is at the forefront of research all over the world. Brother Rafael was in charge of looking for someone to help us with this task, which has been difficult because people are committed, but in the end we did not make any progress. Right now we are reactivating this, since Bro. Rafael asked his superior to sign him up for an online course in web design, to which he generously agreed and, with the help of an expert, they are (calmly) building the website.
- **Contacts with the dioceses:** Sister Melissa undertook to contact all the pastoral agents of youth and catechesis in order to put into action a plan for the profusion of our spirituality in these circles. The proposal has been well received by the agents, who have asked us to write the material and send it to them so that next year we can be included in their work calendars. For this, in due course, we will ask the EN to help us with their generosity.
- **Compilation of material:** Brother Guillermo did an exhaustive fieldwork and compiled the materials of various activities not only of the Order, but also of the Benedictines and other circles that organise meetings for young people. With these we will prepare a dossier which we will send to the communities, so that they can have it as a guide if they are encouraged to hold a meeting with people who are willing to find in our charism a source of spiritual growth.
- **Contact with the delegate of PEJ:** Finally, Bro. Rafael agreed to organise this approach, which was a fact and is described in the first point (I attach a testimony of these days).

3. As a commission we have seen, through our colloquium, that the mission entrusted to us is clear and that it has a future, as long as the space for action is to make our charism known and not vocations ministry, since the latter is something that concerns the communities more, of course making a synergy of collaboration and solidarity between the two. That is why in our new proposals we need to know who, in their freedom, wants to get involved in this challenge that has been entrusted to us, since without their collaboration any proposal to activate our charism will be in vain.

- Brother Guillermo did a volunteer experience in his monastery with a Navarrese organisation of cultural initiatives for young people called "Patrimonio para jóvenes", where a small group of mixed university students, well chosen by those in charge, put themselves at the service of the monastery in the tasks that had been previously prepared in terms of cleaning and recovery of spaces. In addition, they

offers them the accompaniment of a monk so that they can have a presence and dialogue, which is essential for them to get to know in depth what our life entails, with occasional formative talks and free participation in the prayers. In this respect there are some other proposals from associations such as the Order of Malta.

- One of the challenges we face is the current language of the youth, where we see that we do not have enough skills; for this we propose a plan of knowledge in this field so that we can be more attractive and the path becomes more bearable. Brother Rafael had some dialogue with the Jesuits who have some training in this field aimed at their teaching staff, but they would be willing to provide us with this space in order to train us.
- We see that the media are a means of rapid and necessary dissemination to be known, so we thought that, apart from the web, it would be good to create a YouTube channel where we can display, through testimonies, round tables, interviews, some history... all the treasure of the heritage of our spirituality.
- With regard to the above, two of "Patrimonio para Jóvenes" who have finished their audiovisual studies and who have already done some work for the association, are willing to make us an updated and attractive vocational video, which should be remunerated for a symbolic amount of about 500 €, which seems interesting. We therefore appeal to the generosity of the EN to carry out this initiative.
- Initiatives of collaborations in interviews and conferences, both in person and online, is something that can help. Brother Rafael has already collaborated with the Daughters of Charity in some online activities. Brother Guillermo participated as a speaker in a course for religion teachers in the south of the Community of Madrid entitled "Keys for the development of spiritual intelligence in the religion class", exposing the monastic life. These courses give him credits and for this reason our participation was remunerated.
- Collaborations with other commissions such as: publications, formation, liturgy and music.

In retrospect we have realised that our performance is actually slower than other commissions and perhaps the fruits are not seen as quickly as in those commissions. We have always said that we are like those described in Psalm 126, "those who sowed in tears", because we believe that we must sow all that has been freely given to us, even if it is others who "reap in song". This invites us to join forces and celebrate our charism from the diversity of each community, because this is what really gives witness to the one who looks among us: those common values in diversity, which are the key and which express who we are and the inner strength that following Jesus gives us as monks.

4. REPORT OF THE MEN'S AND WOMEN'S INTERNSHIPS

The report was presented by Fr Isidoro M^a ANGUITA, from Huerta.

GENERAL REPORT OF THE FEMALE INTERNSHIP FOR THE 3rd CYCLE and 4th CYCLE.

1. Introduction

I am writing this report of the Women's Internovitiate for the SR which will take place from 12 to 17 March 2024 in the Monastery of Las Huelgas.

The last report that was submitted to the SR is from June 2022, so the courses of the present note go from the second course of the year 2022 to the first course of the year 2024, in which we are currently, four courses in total. In the following table we will see it better:

4TH CYCLE OF THE FEMALE INTERNSHIP						
	Year 2022 <i>Online</i>		Year 2023 Face-to-face		Year 2024 Face-to-face	
Course		<i>Year 1</i>	<i>Year 2</i>	<i>Year 3</i>	<i>Year 4</i>	
		From 15/09 to 14/11	From 3/02 to 17/03	From 27/09 to 14/11	From 28/01 to 21/03	
Participant s		25 Srs.	10 Srs.	11 Srs.	9Hnas	

2. Post-pandemic courses:

From the 2nd year of the year 2022 to the 1st year of the year 2024

For the 2nd course in 2022, there were no longer restrictions by Covid, so it could be considered after the Pandemic, however, it was the last course to be transmitted *online*, as there was still no training team, and a new place to meet had to be found. As they are two different modalities, I will present them separately, highlighting the most relevant parts of each course.

A. *On-line course: 2nd course year 2022.*

1. With this course we began a new cycle, the fourth. It corresponds to the 16th meeting of the Internovitiate. It took place from 15 September to 13 November 2022.
2. Although in the previous course several sisters finished, in this one there were 25 formandi who participated, and some more only as listeners. The Sisters who joined in the first *online* course were able to do the whole cycle under this digital modality, as we did five complete courses by zoom. Among the students who did it this way, I would like to highlight Sr. Garbiñe, from the Monastery of Vico, of happy memory. I think she is an example of constancy and fidelity. She took part in all the courses, she did all the work that was left, even though she knew that she had little time left to live. She edified us greatly and allowed a good atmosphere through the screen, she said goodbye to us in this course, without making any drama, always encouraging us to continue. I do not want to forget to mention Sr Maria Marlene from the monastery.

of the Encarnación de Córdoba, who is also an advanced pupil in the school of the Lord's service, carrying the cross of sickness on her shoulders. These paschal experiences have allowed us to bind the monasteries more closely together.

3. The subjects are detailed with their teachers:

- a. **History of Monasticism:** Taught by Sr. Rosa Ana.
- b. **History of Salvation:** Taught by Sr. Pilar Avellaneda
- c. **Writing and Reading:** By Elena Prieto
- d. **Passions:** Spiritual Reading, Fr Enrique Contreras (Los Toldos-Argentina)
- e. **Limits and vulnerability:** Presented by Teresa Puró (Psychologist from Palencia)

4. The most important thing about this course is to emphasise that it was the last zoom course, as I have already said. It was a farewell course, as several of the sisters who had been doing the courses up to now can no longer do them in person, which leaves the courses unfinished, not so much for the intellectual part that can be covered in a monastery that has the appropriate means, but rather for the integral formation and the coexistence between formandas of the same stage.

5. Rosa Ana still collaborated in this course in the development of the programme and in giving classes. She also said goodbye to her work as a tutor of the Internship. I would like to express in this report my deep gratitude for her selfless dedication, for her competent collaboration, for her unconditional support for the training and for the team that I formed with her from the very beginning.

6. On Friday 26th November we had the farewell of this course, on this day we announced that the next course would be face-to-face.

B. Face-to-face courses:

a. 1st Year 2023.

1. Isidoro and M. Angelines, to find out how the Internovitiate was going to continue, since the formation team had to be completed, a new place had to be found, and we had to decide how we were going to continue. At that meeting, the course for the year 2023 was practically finalised, as follows:

- a. A number of names were put forward and eventually became part of the team:
 - i. **Luz Stella Escobar**, Sub-teacher (Monastery of Benavente)
 - ii. **Isabel Gallego**, Tutor (Monasterio de S. Clemente, Sevilla)
 - b. It was decided to do it in person, and it was agreed to reduce the time of stay from two months to one and a half months.
 - c. The new meeting place would be Benavente.
2. With the new training team, we met beforehand by zoom to welcome each other and to organise the progress of the course.
3. On 2 January 2023, we sent out the call for the face-to-face course, which started on 3 February and ended on 17 March.
4. On the first day, February 3rd, all those who were going to participate, 10 sisters in all, from the monasteries of Gradefes, S. Joaquín and Santa Ana, Valladolid, Talavera de la Reina, Sevilla, Carrizo and Benavente, were present. We were pleasantly surprised to have the presence of M. Angelines during the first days of the course.
5. We met that first day (3 February) in the morning with M. Myriam, to organise timetables and to see the compatibility of the dynamics of the Internovitiate, with the day of the

monastery. There has been collaboration on both sides, so that we have been able to combine the schedules and the different days quite well. We do most of the hours of the Divine Office together.

6. For the group of trainees it was a new experience, full of fears and expectations. They all agree that, although they miss their communities, the face-to-face courses are much more enriching. Some participants have joined only the intensive courses and the zoom courses.
7. The subjects were:
 - a. **Liturgy.**
 - i. **Introduction to the Liturgy:** Fr. Gerardo Luis Martín (S. Isidro)
 - ii. **Liturgy of the Hours:** Sr. Isabel Gallego (Seville)
 - iii. **Liturgical Year:** Sr. María Fernanda Soriano (Benavente)
 - b. **History of Monasticism:** Fr. Carlos Izquierdo (University of Burgos) *On-line*
 - c. **The Spiritual Path (Vitta Antoni-Evgrio-Casiano):** Spiritual Reading, María Fernanda Soriano and Fr Enrique Contreras (Los Toldos-Argentina) *On-line*
 - d. **Parental Relationships-Obedience:** by Teresa Puró (Psychologist in Palencia)
 - e. **Catechism:** José Antonio Gimeno (Monasterio de S. Isidro)
 - f. **Singing and Vocalisation:** Rosa (Music teacher, Benavente)
 - g. **Writing and Reading:** By Elena Prieto
8. The enthusiasm to return to face-to-face courses made it possible to meet the proposed objectives. As can be seen in the subjects taught, singing and vocalisation classes have been added to this course, which have given very good results.
9. We got on very well with the team as the course progressed: there was listening, collaboration and dialogue.
10. As it was a new house we had to adapt to new work dynamics. Luz Stella organised the work to be done on a daily basis; we looked for new spaces for relaxation, on Sundays we took long walks along some of the paths around the monastery so that they could share in a more relaxed and fraternal way, and regain the strength to continue with the intense daily work.
11. As far as spiritual formation is concerned, it has to be said that spiritual accompaniment has also been able to take place quite regularly with each of the sisters. We had a day of retreat a month after we started. We took the opportunity to offer the sacrament of confession to the monks who came. The spiritual reading has brought back the dialogues/sharing that allow us to deepen the texts.
12. Maria Isabel, who has kept up to date with the subjects taught, looking for bibliography, helping them with the comprehension of texts, dedicating time to help them with the tasks they have to do during the course, in their daily study time.
13. Before we finished, we had to decide where the next course would be held. It was the first time that we had it in a place other than Monte Sión. It was held *ad experimentum* in Benavente, but thanks to the extension of the hostelry, which allows the rhythm of the Internovitiate to be carried out without interfering too much in the community dynamics, the results have been positive. I consulted M. Angelines and the formation team, and between all of us we saw the convenience of continuing in Benavente for a complete cycle. We asked M. Myriam if it was possible to host the Internship again, and when we consulted with the sisters, it became clear that it was possible, for which we are infinitely grateful.
14. The team met with M. Myriam and set the dates for the next course. It was not easy to decide, due to the General Chapter of the Congregation, and PREM. The dates were as follows: 27 September to 14 November.

b. 2nd Year 2023.

Given the good progress of the previous course, there are no major novelties in this second on-site course, the number of participants has been the same as the previous course, as well as the houses that have participated, and the same training team has also been maintained, so I will simply list the subjects that were taught in it:

- a. **Rule of St. Benedict:** Sr. María Isabel Gallego (Seville)
- b. **History of Salvation:** Sister Pilar Avellaneda (Córdoba) *On-line*
- c. **Catechism:** Br. José Antonio Gimeno (S. Isidro)
- d. **Cistercian Anthropology, Part I:** Spiritual Reading, M^a Fernanda Soriano
- e. **Personal Knowledge: *Human Formation*,** by Fr. Félix del Valle (Toledo)
- f. **Singing and Vocalisation:** Rosa (Music teacher, Benavente)

c. Year 1 Year 2024

This is the course we are currently on. We highlight just a few points:

- The number of Sisters has been greatly reduced due to the fact that the Sisters from the monastery of Seville have not been able to attend. Those who have completed the course are: Gradefes (2 participants), Toledo (1 Sister), Lierganes (1 Sister), Benavente (1 Sister). Two Sisters from Las Huelgas and two Sisters from Carrizo joined the Constitutions course with Fr. Juanjo, so although only 5 Sisters are doing the full course, I have put 9 in total who have attended.
- Luz Stella and the Mistress, Sr. María Fernanda, both from Benavente, are participating in the team. The tutor, Sister María Isabel, from the monastery of Seville, has not been able to attend the course.
- As the number of participants was reduced, they were able to get to know each other better, and the new Sisters who joined were able to give a good welcome to the newcomers.
- The subjects taught are as follows:
 - **Cistercian Charism:** Sr. María Fernanda (Benavente)
 - **Psalms:** Sister Pilar Avellaneda (Córdoba) *On-line*, supported by Sister Luz Stella face-to-face classes.
 - **Constitutions:** Fr. Juan José D. (Abbot of St. Isidore)
 - **Cistercian Anthropology, Part II:** Spiritual Reading, M^a Fernanda
 - **Assertive Communication-Emotional Intelligence: *Human Formation*,** by Araceli Vega (Neuropsychologist, Madrid)
 - **Singing and Vocalisation:** Rosa (Music teacher, Benavente)

That's all for now. We are only a few days away from the end of the course, we are happy to have carried it out despite the initial doubts about whether or not to do it due to the low participation of trainees.

We are very grateful to all those who have encouraged us to continue, to those who have taught and given of their time so that our sisters in formation can have a firm foundation, which will be the pillars for the whole of monastic life.

We continue to count on your prayers that under Mary's protection we may learn in the Lord's school to be disciples of her Son.

Isidoro indicated that it continues to be online. In the last quarter of 2022, 10 novices from 5 monasteries participated. In the first quarter of 2023, 19 novices from 7 monasteries participated and in the second quarter of 2023, 9 novices from 6 monasteries participated.

5. ECONOMY OF THE RE

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Guillermo de Cardeña, presented to the Assembly the economic situation of the Spanish Cistercian Regional Conference for the last two financial years 2022 and 2023, focusing his explanation on five areas: FINANCIAL SITUATION, RE, CISTERCIUM, CISTERCIENSE LIBRARY and B.A.C., graphically summarising everything in an OVERALL RESULT.

In 2023, community fees will be charged again after the pandemic hiatus in which it was decided not to charge them in order to help the communities in the multiplication of expenses for this reason and for the absence of face-to-face courses and, with them, the disappearance of expenses in this sense; even so, in these 2 financial years there is not an excess of courses either, so the recovery between expenses and income is very healthy and coherent.

In spite of the evident decrease in subscribers in all publications, the result in both Cistercium and Biblioteca Cisterciense is very healthy and allows us to continue working without worrying about this issue. Cistercium continues to maintain the same subscription cost as it does not seek any lucrative interest, trying to update itself in the same way as journals of the same line, improving its quality and reducing its size, as previously requested, which reduces its cost in order to improve other qualities. Biblioteca Cisterciense only brought out one new issue each year, but it took advantage of this to reprint or bring out second editions of other issues, a sign of the good sales figures for some titles. As for the BAC, there was no investment of any kind, so the stable profits from the rights acquired on these issues continued.

Finally, both in each area presented and in the overall result, it is clear from the progress made over several years that the result of each year should not be seen individually in any field due to the difference in volume or activities resulting from each one, as it is rather a joint work where some years more expenses are faced and are recovered with the benefits of other years, always resulting in a positive and very comfortable recovery that allows peace of mind and security in which to consider investing in other necessary expenses for the benefit of both training and publications and, of course, thinking of the communities.

Appropriate questions are clarified at the assembly.

6. OTHER ISSUES: SHARED DISCERNMENT

The theme was presented by M. Pilar GERMÁN, from Tulebras. Pilar GERMÁN, from Tulebras, indicated that this is a proposal that everyone can take back to their respective communities. It is a question of considering in each community what needs to be left behind, what needs to be healed and learned and what needs to be welcomed.

This proposal is also made at the level of the Region so that by reflecting together we can shed light on each other. And he proposed to maintain contact online for those who are interested.

M. Ana MONEO de Armenteira indicated that something that can help is to remember the context in which this dynamic was proposed and that it was the weak situations of our communities and the lack of capacity to respond. In short, it is good to maintain contact in order to make change more accessible.

7. SELF-ASSESSMENT AND CLOSING OF THE REGIONAL CONFERENCE

The vast majority of those present agreed on the good atmosphere that reigned throughout, the fraternity and the good work in which the Regional Conference was carried out. The participation in the dialogues and the sincerity with which all the topics were dealt with were positively valued. The work of the Coordination Commission and the implementation of the "cloud", which facilitates all the work of the Regional Conference, were appreciated. There was a climate of fraternity, affection and respect in which people listened to each other.

Fr. Isidoro M^a ANGUITA, from Huerta, in his farewell as president of the EN, expressed his thanks for the 16 years in which he has been at the head of the Regional Conference, trying to give the best of himself and in which he has received much more.

M. Angelines de FRUTOS, abbess president of the CCSB wanted to express her joy that the SR was held in Las Huelgas. She pointed out that being able to participate helps her to learn the dynamics of dealing with the issues and makes her feel part of the SR.

The following vote was then taken:

VOTE 21: We entrust Fr. Francisco Rafael de Pascual with the task of preparing a press release stating that the EN has met to discuss various issues of the region and to prepare the next GC with a family photo.

SI: 18NO : 0 ABS: 1 **PROPOSAL ACCEPTED**

José Luis Galiana, from Cardaña and Sr. María TÉLLEZ, from Vico; and as substitute delegates, Br. Rafael ESCOBAR, from Sobrado and Sr. M^a Ángeles OSÉS, from Armenteira.

Our next meeting, for the immediate preparation of the GC 2025, will be in the Monastery of Oseira, in Ourense, from 20 to 25 May 2025 (arriving on the 19th for dinner and leaving on the 26th May after breakfast).

ANNEXES

CG 5 PROPOSAL FOR COMMON NOVITIATES
(ALTERNATIVES WHEN A HOUSE DOES NOT HAVE FORMATIVE CAPACITY)
RE STRIKES 2024

The tradition of our Order and of all monasteries of contemplative life is that formation takes place in the monastery itself.

CHAPTER ONE THE AUTONOMOUS MONASTERY

15. The monastery sui iuris is a religious house that enjoys juridical autonomy: its superior is a major superior [20], its community is stably constituted by the number and quality of its members, it is the seat of the novitiate and of formation, it enjoys public juridical personality and its goods are ecclesiastical goods.

250. Initial formation is the privileged time in which the sisters who are candidates to contemplative monastic life, **with the special accompaniment of the formator and the community**, are introduced into the following of Christ, according to a specific charism, progressively assuming and integrating their personal gifts with the authentic and characteristic values of their vocation". (Cor Orans)

At the moment, given the precariousness of some of our monasteries, the conditions necessary to guarantee the integral formation of the candidates to monastic life in these communities are not in place.

How can this important question be answered?

- Deny reality and continue to "form" novices in their own communities.
- To look for alternatives to guarantee the adequate and well-deserved formation of the novices.
- Close the novitiates.

Proposal for common Novitiates (reflection of the community of Alloz)

Faced with the fragility we experience in our communities, there is a need for collaboration and mutual help in the formation of potential aspirants. In our reflection on the Proposal for Common Novitiates, different criteria were exchanged:

In principle, the ideal is the accompaniment and formation of the aspirants in their own community. It was emphasised that although the community is small in number, fragile in health and advanced in years, it has the capacity to transmit its long spiritual experience and the values that characterise our charism, helped by the means that the Order, the SR and the Dioceses currently have at their disposal for this purpose. Reference was also made to the possibility of

that a Mother House in a situation of fragility could be helped through one of her Daughter Houses by providing them, if possible, with a Mistress of Novices.

But realistically we realise that this fragility, which to a greater or lesser extent affects us all, can and does lead to a situation that does not allow us to offer a strong experience of community life, often marked by unavoidable absences, nor a cadre of people for follow-up, accompaniment and formation, not only intellectual but above all vital, nor an organised and formative work plan, even when the sisters maintain their vitality and their generous and sometimes heroic dedication to their fidelity to Christ and to their own community.

This reality, seen with the luminous eyes of faith, leads us to divest ourselves of our securities; it makes us more like the poor Jesus Christ, who "emptied himself of his rank", making us sharers in his mystery of salvation which involves this suffering humanity; it gives us the opportunity to grow in the family spirit of our communities through collaboration and mutual help which, besides being a richness, will contribute to strengthening the bonds of "communion in love" and friendship.

And above all, we must continue to walk in hope, radiating illusion and joy, fruit of the conviction that Christ walks with us and that we follow in his footsteps. This is the best witness we can give to the aspirants.

In this sense, faced with the two options proposed in the Proposal: a common novitiate or a novitiate in another house of the Order, also set out in number 259 of Cor Orans, it seems to us that the Protocol should be flexible, leaving each community free to choose for the formation of its aspirants the community most in keeping with its own identity.

It is important that in the novitiates the contemplative and mystical dimension of our Cistercian charism be strengthened and that we take care that the "cares of this world", that is, "the worldliness of which St. Benedict speaks in the instruments of good works, does not seep in or tarnish it. "The mystical flame of the contemplative keeps alive in the Church the knowledge of God which is attained by experience" (Paul VI to the Order).

Of course, it is important to create a protocol or directory in which, within the flexibility mentioned above, certain points are specified:

- Who defines the moment when a community is helped to realise that it is not in a position to train its aspirants? Who makes the decision?
- Agreements between the two superiors: the sender and the receiver
- The times that the aspirants spend in one house or the other are as indicated in N° 5 of the Acts of the SR: Easter, Christmas, Summer, and there may be some other events. This should be specified by both Superiors.
- We believe that at least the aspirancy should be done in the house where they enter. And the postulancy, which lasts one year, where should it be done, and wouldn't it be better to do it in the house where you enter in order to be able to make discernment in view of the beginning of the novitiate?

- The Rite of the beginning of the Novitiate should be done in the house they have entered. When do they join the training house?
- Discernment for Profession must be made by the Community that has received it, taking into account the information received from the Formation Community.
- As for the structure of a common novitiate, an evaluation of the Internovitiate will be necessary; perhaps the meeting of different nationalities and cultures can be an enrichment, but it is perceived as more impersonal and cold because it is not surrounded by a community.

259. In the event that, on the occasion of the canonical visitation, it appears that a monastery sui iuris cannot guarantee a quality formation, the initial formation must take place in another monastery of the Federation or in the common initial formation centre of several monasteries. (Cor Orans).

**Immediate Mothers Working
Document (revised)**

Scheme

- 1. Introduction**
 - 1.1 Brief historical overview
 - 1.2 Most recent developments
- 2. The possibility of permanent "Immediate Mothers".**
 - 2.1 "Immediate Mothers" for new (future) foundations
 - 2.2 "Immediate Mothers" for existing communities
- 3. Necessary changes in our legislation**
 - 3.1 Change of superior in a daughter house
 - 3.2 Regular visits
 - 3.3 Chaplain to nuns
 - 3.4 Solemn profession of the nuns
- 4. Particular questions**
 - 4.1 A member of the Abbot General's Council as Immediate Past Father/Mother?
 - 4.2 Someone from outside the Order as Immediate Parent?
- 5. Decisions to be taken**
 - 5.1 Terminology
 - 5.2 "Permanent "Immediate Mothers
 - 5.3 Other changes

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This document is the response to vote 22 of the 2022 General Chapter Part 2 (Assisi, September 2022) which asked the Law Commission to prepare a working document on the issue of Immediate Mothers for consideration at the 2025 General Chapter.

**VOTE 22: WE ASK THE LAW COMMISSION TO PREPARE A WORKING PAPER ON THE ISSUE OF IMMEDIATE MOTHERS FOR CONSIDERATION AT THE 2025 GENERAL CHAPTER.**

PLACET 141 NON PLACET 2 ABSTENTIO 4 **Proposal accepted**

All the references to Immediate Parents that exist in our current own law are listed in an Appendix to this document (*Appendix I: Role and Responsibility of an Immediate Parent in our current law*). For convenience, these references are grouped under the headings Filiation; Role (job description) of the Immediate Parent; Regular Visitation; Role of the Immediate Parent when there is a change of superior in a daughter house; Consent and Consultation; General Continuing Care; Special Situations; Foundations; the General Chapter; Solemn Profession of the Nuns; Chaplain to the Nuns, Communities, and the Nuns of the Immediate Pastoral Care of the Nuns.



fragile; and the Cîteaux community. You may find it useful to refer to the relevant section of the Appendix as you consider the various points.

## **1. INTRODUCTION**

### **1.1. Brief historical overview**

Since, in response to the directives of the Second Vatican Council, our Order undertook the updating of its legislation, the relationship between monasteries of monks and those of nuns became an important issue. Until then, the nuns were juridically dependent on a General Chapter composed only of abbots.

Assemblies of Abbesses had already been introduced before the Council. Our new Constitutions, approved in 1990, envisaged a single Order under the authority of two distinct but interdependent General Chapters. After having functioned for several years as two General Chapters united in a single General Assembly, in 2011 we obtained from the Holy See the right to have a single General Chapter.

This evolution required a rethinking of the nature and functioning of the filiation, the essential structure of the Order from its beginnings, and in particular of the role of the Father Abbot in relation to the monasteries of nuns. Over the years, the possibility of "Immediate Mothers" has been raised more than once. The General Chapter of 2022 proposed this question to the Regions for their reflection in view of the next General Chapter.

This working paper aims to assist the regions in this reflection effort.

### **1.2 Most recent developments**

In recent years, the theological idea that authority derives from office, not ordination, has been expressed legislatively in various ways. One of these is Pope Francis' rescript of 18 May 2022, under which non-clerics (non-ordained brothers) can now be elected abbots in monasteries of monks. Another example is the appointment by the Holy See of nuns to carry out an apostolic visitation in a monastery of monks.

In the light of these developments, and on the recommendation of the commission that studied the report of the house, the General Chapter of September 2022 approved the appointment of an abbess as delegate of the Immediate Father for a particular community of nuns until the General Chapter of 2025 (M. Anne-Emmanuelle de Blauvac, for the community of Fons Pacis; Vote 115).

Later, at the same Chapter, an abbot whose community needed an Immediate Father indicated that he was very willing for an abbess to fulfil this role, and arrangements were made for this to happen (M. Joanna of Whitland for the community of Bolton). Other appointments of nuns followed, either during the Chapter or shortly afterwards. At the date of writing, there are five abbesses who have been granted the authority of the Immediate Father, either by delegation or by appointment: M.

Brigitte de Tautra for Bethlehem, M. Pascale de Arnhem for Schiermonikoog and M. Katharina de Nazareth for Aiguebelle, in addition to the two already mentioned. Another is in the process of being appointed (see Appendix II on delegation and appointment). Four of the six communities to which these abbesses now exercise their responsibility are monks. The abbesses' exercise of responsibility is for a fixed term; they are not permanent.

This paper, therefore, does not address the question of *whether* nuns can exercise the responsibilities of an Immediate Father, but considers (a) the possible introduction of "Immediate Mothers" on a permanent basis, and (b) the changes we need to make in our own law so that nuns can exercise the responsibilities of an Immediate Father, given that this is already a reality, at least in temporary situations. We also take into account the possibility that an Immediate Father is now a brother, not a priest.

## **2. THE POSSIBILITY OF PERMANENT "IMMEDIATE MOTHERS"**

### **2.1. "Immediate Mothers" for new (future) foundations**

#### ***Filiation; Paternity; the role of the Immediate Parent as a legal "form" of filiation***

According to our Constitutions, "Cistercian communities are united among themselves by the bond of filiation" (C. 73, monks and nuns); and "According to tradition, filiation takes juridical form in the function of the Immediate Father" (C. 73, monks) or "...in the special relationship of a community of nuns with a monastery of monks, whose abbot acts as Immediate Father to the nuns" (C. 73, nuns).

For monks, "When a foundation is erected into an autonomous monastery, by the very fact, the abbot of the founding house becomes its Immediate Father" (St 73.A, monks); for nuns, "When a foundation is erected into an autonomous monastery, the abbot of the monastery which assumed the paternity becomes its Immediate Father" (St 73.B, nuns).

#### ***The role of the Immediate Parent***

C 74.1 (m and f) outlines in general terms the role of the Immediate Father: "The Immediate Father shall see to the progress of his daughter houses. While safeguarding the autonomy of the daughter house, the Immediate Pastoral Father is to assist and support the abbot in the fulfilment of his pastoral office and to foster harmony in the community. If he sees that any precept of the Rule or of the Order is being violated in it, after consultation with the local abbot, he shall endeavour with humility and charity to remedy the situation".

This description can equally apply if the person performing the function is not clergyman.

#### ***The role of a community towards a daughter house***

Although C. 73 says, for both monks and nuns, that "paternity and filiation are expressed in mutual help and support", after the stage of simple priory (which remains entitled to the assistance of the founding house both in personnel and temporal goods, Est. 5.A.b, monks and nuns) the community as a *whole* has no explicit obligation towards a daughter house. The obligations mentioned in our proper law are those *of the Immediate Father* towards his daughter house. The obligation of the community consists in allowing its abbot to fulfil the obligations of the Immediate Father towards the daughter house.

*NB:* Our legislation does not establish any financial obligation of an Immediate Father or his community towards a daughter house after it has reached a rank higher than simple priory (for monks), or at any time (for nuns).

The Constitution speaks of "mutual" assistance and support. The only instance in our legislation where the daughter house is implicitly required to assist and support the Immediate Parent house (the "mother house") is in the *Fragile Communities Statute*, which encourages a fragile community to seek help "within the parentage". This implies an obligation on a daughter house to provide help to a fragile parent house if possible.

From these fundamental principles of filiation and paternity in the OCSO no legal reason arises to prevent a change in the structure of filiation of the nuns, making it equal to that of the monks, so that for future foundations the abbess of the founding house becomes the "Immediate Mother" of the daughter house when the foundation becomes autonomous (taking into account some necessary adaptations indicated in Section 3 below).

Points in favour of this change:

- Legal links between nuns' houses are created
- Equality of nuns and monks in the Order increases
- Enables abbesses to exercise more responsibility
- Relieves the burden on monk communities to care for their daughters' homes
- Fears that this would lead to a split into two Orders are no longer justified, as we now have a single General Chapter.

Points against this change:

- It is a significant change to a long-established way of doing things.
- It could mean a decrease for the nuns in the fruitful exchanges and interaction provided by the current system.
- Some regions or communities have already indicated that they do not want "Immediate Mothers".
- Could lead to further separation of monks and nuns

## **2.2 "Immediate Mothers" for existing communities**

### ***Changes of affiliation***

It is possible for a community to have a change of parentage, and in practice this is not uncommon. At the date of writing (January 2023), only 74 of

152 autonomous communities of the Order have the abbot of their founding house (monks) or of their original "mother house" (nuns) as acting Immediate Father. Another 43 communities have had a definitive change of affiliation, while the remaining 35 communities either have a delegated or acting Immediate Pastoral Father, do not have an acting Immediate Pastoral Father or are currently outside the structures of the Order.

A change of affiliation requires the **consent** of the conventual chapter of the communities involved (ST 37.B.d), and the **approval** of the General Chapter (St 79.A.e). If there is no agreement between the communities, the decision rests with the General Chapter (ST 73.B, monks and nuns). *NB: The word "discussion" in the text of St 73.B m / 73.C f is not accurate and should be changed.*

In some cases, three conventual chapters must vote: the "daughter house" that changes to a new filiation, the community that has exercised paternity up to now, and the community that agrees to exercise paternity from now on. If the change occurs, for example, by the suppression of the community that has exercised paternity, it is obvious that the vote of that conventual chapter is not required.

Can a community of nuns permanently accept the "paternity" of an existing community that needs or desires a change of affiliation? There is no legal reason preventing a community of nuns from accepting the "paternity" of a community of nuns or a community of monks (with the necessary consents mentioned above, and taking into account some necessary adaptations indicated in section 3 below).

Points in favour of this change:

- Equality of nuns and monks in the Order increases
- Enables abbesses to exercise more responsibility
- Relieves the burden on monk communities to care for their daughters' homes
- It offers communities of monks the possibility of benefiting from the richness of interaction with the feminine expression of the Cistercian charism.

Points against this change:

- It is a significant change to a long-established way of doing things.
- Some regions or communities have already indicated that they do not want "Immediate Mothers".
- It could be a burden for communities of nuns who accept the "paternity" of one or more communities (absence of the abbess for visitations, etc.).

### **3. NECESSARY CHANGES IN OUR LEGISLATION**

In order for nuns, or non-clerical brothers, to be able to exercise the role of Immediate Mother/Father, some changes in our current legislation are required or seem desirable.

#### **3.1 When there is a change of Superior in a daughter house**

*(a) Vacant seat:*

For the monks: "In the daughter house without an abbot, the immediate father takes charge of everything" (C. 39.1 m). For the nuns: "The prioress assumes the government of the vacant monastery; however, she does not make any change or take any important decision except for a grave and urgent cause. In this case she is strictly obliged to hear the Conventual Chapter and, if she can, the Immediate Father".

In both cases it is someone who takes care of the day-to-day business, not a superior in the canonical sense. The community is truly a *vacant see*.

It is desirable that our legislation be harmonised on this point. We propose that Constitution 39.1 for monks be brought into line with that for nuns, so that the prior assumes government while a monastery of monks is in a *vacant seat*.

Points in favour of this change:

- harmonises our legislation
- indicates more clearly that the Immediate Father of the monks is not a "canonical superior" during the period of the *vacant see*
- gives the prior the same rank as the prioress (this is the only place in our Constitutions where the prioress is mentioned; currently the prior is not mentioned at all).

Points against this change:

- is not strictly necessary, the current legislation can work even if the community of monks with a *vacant seat* has an abbess "Immediate Mother".

(b) *When a vacant seat monastery has daughter houses:*

Another question arises concerning the period of *sede vacante*. It is not written in our legislation, but it is customary that, if the *vacant see* community has daughter houses, the Immediate Father of the *vacant see* community acts as Immediate Father of those daughter houses if the need arises. We suggest that this be incorporated into our own law, for example, by adding a St. 39.1.A "Where a *vacant headquarters* community has daughter houses, the Immediate Parent of the *vacant headquarters* community acts as Immediate Parent to those daughter houses when the need arises".

Points in favour of this change:

- Incorporates into our legislation a custom rooted in the Order
- Clarifies to communities whose "mother house" is a *vacant seat* whom they should contact if they need the service of an Immediate Father during this time.
- If we change the current C.39.1 as suggested above (so that the prior, and not the Immediate Father, takes over the government of the *vacant see*) the role of both the prior and the Immediate Father becomes clearer.

Points against this change

- The situation described above is rare and therefore does not need to be included in our legislation.
- Potentially confusing.

*(c) Role of the Immediate Past Father at the time of the abbot's election*

C. 39.2 of the monks allows the superiors of daughter houses to vote in an abbey election in the mother house. An abbot may vote in an abbey election in the community of his Immediate Father. If an abbot has a nun as his Immediate "Father", he will not have that right, because the legislation of the nuns does not allow superiors of daughter houses to vote in abbey elections. Therefore, some abbots will have more rights than others. The situation must be normalised.

The simplest thing would be to delete the phrase "together with the superiors of the filial houses, they elect collegially", so that C.39.2 of the monks would read: "The abbot is elected by the conventual chapter. The Immediate Father, who presides over the election by right, or his delegate, will promote among the brothers the spirit of faith and discernment, so that they may choose a worthy administrator for the house of God".

Points in favour of this change:

- It means that some abbots do not have more rights than others.
- It harmonises our legislation.
- It equates monks with nuns, who have never had the right to participate in a vote to elect their Immediate Father.
- Many abbots in practice renounce their right to vote at the mother house; the law would reflect the life of the abbots.
- In small communities with a large number of daughter houses, the vote of those who are not members of the conventual chapter may suffice to determine the outcome of an election, which does not seem correct.

Points against this change:

- It abolishes an ancient right of abbots, closely linked to the structure of filiation.
- Why should an abbot who exercises his right to vote in the motherhouse be deprived of this right because other abbots choose to have an Immediate Mother instead of an Immediate Father?

*(d) Passive voice in the abbatial election*

Est 39.3.B of the monks states that "Any professed brother of the Order may be elected abbot, even the abbot of a daughter house, if necessary". This gives abbots of daughter houses passive voice in a situation where abbots of daughter houses of nuns would have no such passive voice. An abbot can be elected in his mother-house (the house of his Immediate Father); if we opt for similar structures of filiation for nuns, an abbess would not have that right in her mother-house (the house of her Immediate Mother).

In order to give the same rights to abbots and abbesses, we could take the right away from the monks or add it to the nuns.

The Regions are invited to study this issue further.

### 3.2 Regular visits

#### *(a) Abbesses on a visit in a monastery of monks*

Our present legislation does not allow an abbess to be the Visitatrix in a community of monks (she can be the assistant Visitatrix; she can also be the Visitatrix in a community of nuns). As already indicated, this is an area where mentality and practice have changed. Abbesses who already exercise the responsibility of Immediate Father towards a community of monks have the right and the duty to carry out the Regular Visitation in that community. This ability of an abbess to conduct a visitation in a monastery of monks should be reflected in par. 8 of the *Statute on the Regular Visitation* on who can be a delegated visitor. The limitation to abbots for communities of monks is no longer justified.

Proposed change: Par. 8 of the Statute on the Regular Visitation should read: "The delegated Visitor (in any monastery, whether of monks or nuns) may be the superior, monk or nun, of an autonomous monastery, or a former abbot or abbess, a former prior or prioress, or an adviser (acting), monk or nun, to the Abbot General".

#### *(b) Harmonisation of C. 74.3*

C. 74.3 of the nuns says that "as far as possible, [the Immediate Father] should be available for consultation and advice during the Regular Visitation when he has delegated his right of visitation". Since the delegation of visitation is now obligatory at least every six years in communities of monks, we recommend that this provision be incorporated into the monks' legislation as well.

### 3.3 Chaplain to nuns

"The Immediate Father, after hearing the Abbess and the nuns, must propose to the local Ordinary, in accordance with canons 567 and 630 of the CIC, a monk of the Order competent in liturgical and pastoral matters, as chaplain and ordinary confessor" (C 76,1 monks; cf. C 76,1 nuns).

#### *(a) Provide a chaplain*

In our current legislation, it is not the responsibility of the Immediate Pastors to provide a chaplain from their own community, and the number of those who can do so is rapidly diminishing.<sup>1</sup> However, ensuring that a community has a chaplain is an important element in the process of providing a chaplain.

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<sup>1</sup> A survey carried out at the end of January 2023 by means of two questions sent to all the superiors of the Order's houses of nuns produced the following information (62 superiors out of a total of 69 responded): Of those who responded, **55% rely** on diocesan priests or other religious exclusively for the celebration of Mass and the sacraments; Only **29%** have a full-time or nearly full-time OCSO chaplain. **The remaining 16%** have a combination of OCSO and other priests.

Eight communities (**13%** of respondents) **do not have daily mass**. One abbess pointed out that this can have a negative effect on vocations: if a candidate sees that there will be no daily mass, she is less likely to choose that community.

of the pastoral care of the Immediate Father, and if he is unable to provide one from his own community, it remains his duty to try to help the abbess find one.

It is obvious that, if a community of nuns has an Immediate Mother, it is impossible for her community to provide her with a chaplain. But the duty to help the abbess of the daughter house to find one would also be part of her pastoral care of the daughter house.

The *Statute on Regular Visitation* par. 16 m. could be amended to read "the provision of a chaplain and his ministry, in monasteries of nuns".

*(b) Proposing the chaplain to the local Ordinary*

Proposing a priest to the local Ordinary as chaplain is not a clerical duty. The Code of Canon Law (can. 567) states that "the Superior of a house of a lay religious institute has the right to propose to the local Ordinary a certain priest as chaplain". This may apply to communities of nuns which have a non-clerical Immediate Father or Immediate Mother, i.e. in such cases, either the abbess or the non-clerical Immediate Father or Immediate Mother may propose the chaplain, as seems most appropriate depending on the circumstances.

*(c) An Immediate Parent who is not a cleric*

The priests of our communities have as their Ordinary their own abbot. If a non-cleric is elected abbot, when the Holy See confirms his election it will have to be clarified whether he has the authority to issue letters dimissorial ("to call a brother to the priesthood"), to suspend the faculties of a priest of his community, and so on. This is the case in some Benedictine monasteries which already have elected non-clerical priors, and in non-clerical male Institutes where there are a small number of ordained members. If the non-clerical superior does not have this authority, then someone else (e.g. another abbot of the Region who is a priest) will have to be appointed to act in these matters.

However, none of this affects a non-cleric being an Immediate Father, nor does it have implications for the "Immediate Mothers" of communities of monks, since the Immediate Father does not act as Ordinary to the priests of his daughter house. An Immediate Father is not required to be a priest.

### **3.4 Solemn profession of the nuns**

As for the solemn professions of the nuns, the "presidency" of the Immediate Father referred to in C. 74.3 of the nuns has no juridical consequences: it is the abbess who receives the profession of vows of a nun (cf. *Cistercian Ritual*). The Constitution could be adapted by adding "if she is a priest", or it could be deleted.

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Several abbesses who have OCSO chaplains pointed out that "this will probably be the last one". Two communities of monks are still able to provide two full-time chaplains each.



The reference in the nuns' profession formula to "in the presence of the Immediate Father" could be made optional. In practice, it must be adapted to the circumstances (in fact, the Immediate Fathers are not always present at the solemn professions of the nuns).

#### **4. SOME PARTICULAR ISSUES**

##### **4.1 Could a member of the Abbot General's Council be Immediate Past Father / Immediate Mother?**

This question has been raised in practice. At the legal level, there seems to be no reason not to do so, on a temporary basis. However, there is a potential conflict of interest. Certain matters must be voted on, or at least discussed, by the Abbot General's Council, and a Council member whose branch house is in question cannot be expected to have the desired objectivity. It could create difficulties in the relationship between the Abbot General and one of his Council members. It does not seem desirable. A Council member may be able to help a community in some other way, but not as Immediate Father/Mother.<sup>2</sup>

We could incorporate into our own law that a member of the Abbot General's Council cannot simultaneously serve as Immediate Past Father/Mother.

##### **4.2 Could someone who is not a member of the Order be a delegate or appointed Immediate Past Father/Mother?**

For example, could a Benedictine or O.Cist abbot or abbess be delegated or appointed?

This proposal seems contrary to the basic principle that "Cistercian communities are united by the bond of filiation", a filiation which "has its juridical form in the function of the Immediate Father". An abbot or abbess of another Order could not be the bond of union of an OCSO community to the OCSO as an Order. Moreover, someone from outside the Order could not be expected to have the Cistercian sensibility necessary for a good supervision of the daughter houses.

And an Immediate Father/Mother from outside the Order would not be present at the General Chapter, where they play a very important role, especially for a community in difficulty.

We came to the conclusion that someone outside the Order should not be appointed Father / Mother Immediate.<sup>3</sup>

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<sup>2</sup> The Abbot General acts as Immediate Father of Cîteaux. The question arises: if a Councillor cannot act as Immediate Father/Mother because of a possible conflict of interest, surely the same applies to the Abbot General himself. Is it appropriate to raise the question of the Abbot General acting as Immediate Father of any community of the Order, and to suggest that someone else act as Immediate Father/Mother of Cîteaux? The question of juridical recourse for the community of Cîteaux which "is made up of the abbots of the four oldest houses of the Order after Cîteaux: La Trappe, Westmalle, Melleray and Port-du-Salut" also needs to be reviewed.

<sup>3</sup> In a specific situation, someone from outside the Order could be appointed, with or without a title as "Pastoral Assistant", for a particular task defined in the letter of appointment (e.g. preparing a community for an election). Such an appointment would be made by the General Chapter after consultation with all the

## 5. DECISIONS TO BE TAKEN

### 5.1 Terminology

It is clear from this document that the gender terminology used in relation to filiation is awkward: "Immediate father/mother", "paternity" exercised by women. It might be useful to decide on a new term that is not gender specific and can be applied to both monks and nuns.

The Regions are invited to propose possible new terminology.

### 5.2 "Permanent "Immediate Mothers

The Order must decide whether it wants to have the possibility of permanent Immediate Mothers, i.e. whether communities of nuns can accept the "paternity" of filial houses (see section 2 above).

If so, how should this be phased in? One possible way is

- that for **future** foundations: the abbess of the founding house becomes the "Immediate Mother" when the community becomes autonomous, so that the nuns have the same structure of filiation as the monks; and
- that **existing foundations of nuns** (which are not yet autonomous) be allowed to choose at the time of autonomy whether they wish to have the abbess of the founding house as their "Immediate Mother", or whether they wish to continue with the intended abbot as their Immediate Father; and
- that for **communities that need to change affiliation**, any community (nuns or monks) can ask any other community of the Order (nuns or monks) to accept "paternity".

### 5.3 Other changes

The other points raised in this paper need to be decided:

1. Adapt C. 39.1 for monks to those for nuns: see 3.1 (a) above.
2. A on the responsibility of an Immediate Parent towards the daughter houses of a daughter house that is a *vacant seat*: see 3.1 (b).
3. Adapt C. 39.2 of the monks on the voting rights of superiors of daughter houses in an abbot's election: see 3.1 (c)
4. Passive voice of abbots of daughter houses at an election: see 3.1 (d)
5. Acceptance that abbesses can be Visitatrixes in a monastery of monks: see 3.2 (a)
6. Harmonise C. 74.3 on the Immediate Father of the monks being available for consultation and advice during a delegated Visitation in a daughter house: see 3.2 (b)
7. Add a sentence to the paragraph on the chaplain in the *Statute on the Regular Visitation*: see 3.3 (a)
8. Adapt the wording of C.74.3 of the nuns: see 3.4

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interested. Someone from outside the Order may, in special circumstances, be appointed to conduct a regular visitation or to preside at an election. This appointment may be made by the Abbot General.

9. Specify in our own law that a member of the Council of the Abbot General cannot simultaneously act as Immediate Past Father/Mother: see 4.1.
10. Change the word "deliberation" in St. 73.B.m / 73.C f to "consent" or "approval": see 2.2.

## **Conclusion**

There is no juridical reason why an abbess (or a non-clerical monk) cannot exercise the function of Immediate Father, either for a monastery of nuns or for a monastery of monks. Some abbesses already do this on a temporary basis.

The Order must decide whether it wishes to introduce the possibility for communities of nuns to accept "paternity" with abbesses exercising the role of "Immediate Mother" on a permanent basis and, if so, how to incorporate this into our structures. One possible way has been outlined above.

We also need to consider (a) whether we want to change to other terminology, and (b) the various related issues listed in 3.5 above. **I assume you mean point 5.3 above.**

**STATUS OF THE CONSTITUTIONS ACCORDING TO THE VOTES OF GC  
2022 AND AFTER THE DIVCSVA'S REPLIES OF 18 APRIL 2023 AND 11  
AUGUST 2023**

**I PRESENTATION OF THE TEXTS**

The new texts of the Constitutions and Statutes of the Nuns and the Constitutions and Statutes of the Monks are presented below in two columns. This provision allows:

- Appreciate the changes, innovations, coincidences and divergences between the rights of nuns and monks since the vows taken at GC 2022.
- Identify the incorporation of the observations and corrections made by the Dicastery for Institutes of Consecrated Life and Societies of Apostolic Life (DIVCSVA) in its two responses: that of 18 April 2023 and the response of 11 August 2023, received after a meeting between Archbishop Carballo (then Archbishop Secretary of the Dicastery) and the AG with some of his advisors. We are currently awaiting official approval of the texts by the Holy See.
- To facilitate the identification of changes, new texts are written in red, while the text that remains from the version prior to the 2022 GC is written in black. Texts added by the Holy See are shown in double blue underlining.
- The areas that are affected by these changes and innovations are (in order of the themes):
  - A. **Leave of absence, innovations in exclaustation, eremitical life for the nuns** (Cf. C.13.3; EST 13.3.A; EST 38.B.c; EST 38.B.f; C.62.1; C.84.1.C. h.).
  - B. **Separation from the world: monastic enclosure** (Cf. C.29, the title; C.29.2; EST 38.B.c.bis).
  - C. **Protection of minors and vulnerable adults** (Cf. C.30a; EST 30a.A; EST 30a.B ).
  - D. **Changes regarding the pastoral care of nuns in special circumstances** (Cf. EST 31.A).
  - E. **Appointment of a monastic commissary** (Cf. C. 34bis.1.2.3).

- F. **Admission to a new stability in a monastery of the Order** (Cf. EST 37.A; EST 37.B; C.60.1; -changes in numerals EST 60.1.A; EST 60.1.B-; C. 60.2; ).
- G. **Initial formation: innovations in aspirancy, postulancy, novitiate and duration of temporary profession** (EST 38.C.h; EST 46.1.A; EST 46.1.B; EST 50.A; C.52.1; EST 84.1.D.a).
- H. **Loss of the right to the election** of Abbot/Abbess, Prior/Tenured Prioress, when the number of solemnly professed vows is reduced to five (Cf. EST 39.2.C).
- I. **Innovation regarding the presentation to the GA of the resignation of the Abbot/Abbess on the grounds of age** (cf. EST 40.A; EST 40.a.bis).
- J. **Accompaniment of newly solemnly professed** in the context of ongoing formation (Cf. C.58).
- K. **Accompaniment of fragile communities and suppression of a monastery** (Cf. C.67.1.2.3.).
- L. **Innovation with regard to the obligation to delegate the Immediate Fathers to visit the houses of monks every six years** (Cf. C. 75.1).
- M. **Innovation with regard to the Visitor of legacy in monks' houses** (Cf. EST 75.2.A).

## II NEW TEXTS OF THE CONSTITUTIONS OF THE NUNS AND THE CONSTITUTIONS OF THE MONKS, PRESENTED IN TWO COLUMNS

Edition: after the 2022 General Chapter; IC 2023; DICVSVA 2023

| CONSTITUTIONS NUNS                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | MONASTIC CONSTITUTIONS                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
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| <p><b>C. 13 The cenobitic life 3</b></p> <p>The nun does not leave the monastery without a licence.<br/>of her Abbess. <b>In the case of a prolonged absence, the Abbess, with the consent of her council and for just cause, and after consulting the Immediate Father, may authorise a nun to remain outside the monastery, but not for more than a year, except for reasons of illness or study or, in an extraordinary case, to live as a hermit. (GC 2022/2, vow 85).</b></p> | <p><b>C. 13 The cenobitic life 3</b></p> <p>The monk does not leave the monastery without a licence.<br/>of his abbot. In the case of a prolonged absence, the abbot, with the consent of his council and for just cause, <b>and after consulting the Immediate Father</b>, may authorise a monk to remain outside the monastery, but not for more than a year, except for reasons of illness or study or, in extraordinary cases, to live as a hermit. <b>(GC 2022/2, vow 86).</b></p> |

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| <p><b>EST 13.3.</b></p> <p>The Abbess, having heard her Council, may permit a sister to lead a hermit's life (...) The hermit remains under the authority of the Abbess. <b>If the hermit wishes to reside outside the monastery property, the Abbess must obtain the consent of her council, and the consent of the bishop of the place where she is to reside. <u>In this case, permission will only be granted after proper discernment and after verifying that there is no apparent intention to withdraw from community life or to remove the sister from the monastery.</u></b></p> <p>(GC 2022/2; Voto 87; the last sentence, "In this case... of the monastery" is required by the Holy See).</p> | <p><b>EST 13.3.</b></p> <p>The Abbot, having heard his Council, may allow a brother to lead a hermit's life. The hermit remains under the authority of the Abbot. If the hermit wishes to reside outside the property of the monastery, the Abbot must obtain the consent of his council, the consent of the Ordinary of the place of residence.</p> |
| <p><b>C.29 Separation from the World: <b>Monastic Enclosure</b> (GC 2022/2, vow 91)</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | <p><b>C.29 Separation from the World: <b>Monastic Enclosure</b> (GC 2022/2, vow 92)</b></p>                                                                                                                                                                                                                                                          |
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The rooms where the nuns live and work are strictly reserved for them; however, the faithful may come to the church especially when divine worship is publicly celebrated. It belongs to the Abbess, with the consent of her Council, to establish the limits reserved as a strict enclosure. It is up to her to permit, according to the rules of universal law, for just cause, the entry of strangers and the departure of the nuns.

Note the need for discretion in the use of social media.

Its use is permitted only if the particular nature of the contemplative life is carefully guaranteed. The nuns are to be diligently trained in this discipline of separation from the world. The application of these principles is incumbent not only on the Abbess but on all the sisters. (GC 2022/2, vote 93, with the addition of the phrase "in accordance with the rules of universal law" in response to the Holy See's comments).

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The rooms where the monks live and work are strictly reserved for them; however, the faithful may come to the church, especially when divine worship is being publicly celebrated. It belongs to the Abbot, with the consent of his Council, to establish the limits reserved as a strict enclosure; it is up to him to permit, for just cause, the entry of strangers and the departure of monks. Note the necessary discretion in the use of the means of social communication (...) Their use is permitted only if the particular nature of the contemplative life is carefully safeguarded. The monks are to be diligently trained in this discipline of separation from the world. The application of these principles is incumbent not only on the Abbot but on all the brothers. (GC 2022/2, vote 94)

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| <p><b>C.30a Protection of minors and vulnerable adults</b></p> <p>Each community and each member of the Order, attentive to the respect and dignity of each person, especially minors and vulnerable persons, is vigilant to prevent any form of abuse of power, of conscience and of sexual aggression.</p> <p><b>EST 30 bis.A</b><br/>A community protocol will be drawn up with the various church bodies. The community will receive training on the subject.</p> <p><b>EST 30 bis.B</b><br/>The protocol and its implementation will be examined during the regular visit (GC 2022/2, vote 123).</p> | <p><b>C.30a Protection of minors and vulnerable adults</b></p> <p>Each community and each member of the Order, attentive to the respect and dignity of each person, especially minors and vulnerable persons, is vigilant to prevent any form of abuse of power, of conscience and of sexual aggression.</p> <p><b>EST 30 bis.A</b><br/>A community protocol will be drawn up with the various church bodies. The community will receive training on the subject.</p> <p><b>EST 30 bis.B</b><br/>The protocol and its implementation will be examined during the regular visit (GC 2022/2, vote 123).</p> |
| <p><b>EST 31.</b></p> <p>If in special circumstances any pastoral help is requested from the community (...) and the Abbess deems it appropriate to accept the request, let her entrust this ministry to a sister competent and willing to do so. (GC 2022/2, vow 95).</p>                                                                                                                                                                                                                                                                                                                                | <p><b>EST 31 A</b></p> <p>If in special circumstances pastoral help is requested of the monastery, and the Abbot sees fit to accept the request, let him entrust this ministry to a brother who is competent and willing to do it.</p>                                                                                                                                                                                                                                                                                                                                                                    |



**C. 34a Appointment of a Monastic Commissioner**

**1.**  
When a community is experiencing a particularly serious situation, the General Chapter may suspend the exercise of its autonomy and, having received the opinion of the Immediate Father, may appoint a monastic commissary in accordance with paragraph 10 of the *Statute for the Accompaniment of Fragile Communities and the Suppression of a Monastery*.

**2.**  
The monastic commissary, who may be from within or outside the Order, has ordinary power of her own as major superior of an autonomous monastery, as defined in the letter of appointment. The commissary represents the community at the General Chapter, with the right to vote unless she is not a member of the Order.

**3.**  
The situation of the community will be reviewed at each of the following General Chapters and the autonomy of the house will be restored when the situation has sufficiently improved.  
(GC 2022/2, vow 13; modified by the Holy See by the addition of the phrase "having received the opinion of the Immediate Father" in para. 1)

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| <p><b>EST 37.</b><br/>The Abbess needs the consent of the Conventual Chapter with a <b>two-thirds</b> vote to:</p> <p><b>a.</b> Admit a nun of the Order to stability in the community, subject to the exception foreseen in <b>C.60.1</b>;</p>                                                                                                                                                                                                                        | <p><b>EST 37.</b><br/>The Abbot needs the consent of the Conventual Chapter with a <b>two-thirds</b> vote to:</p> <p><b>a.</b> admit a monk of the Order to stability in the community, subject to the exception foreseen in <b>C.60.1</b>;</p>                                                                                                                                                                                           |
| <p><b>EST 37.</b><br/>The Abbess needs the consent of the <b>absolute</b> majority of the Conventual Chapter to:</p> <p><b>a ter.</b> admit a nun from a suppressed house of the Order to stability in the community (C. 60.2);</p>                                                                                                                                                                                                                                    | <p><b>EST 37. B</b><br/>The Abbot needs the consent of the <b>absolute</b> majority of the Conventual Chapter to:</p> <p><b>a ter.</b> admit a monk from a suppressed house of the Order to stability in the community (C. 60.2);</p>                                                                                                                                                                                                     |
| <p><b>EST 38. B</b><br/>The Abbess needs the consent of the absolute majority of her Council to:</p> <p><b>c.</b> to allow a sister to live outside the monastery in the cases referred to in the <b>C.13.3</b>; (cf. GC 2022/2, vote 85).<br/><b>c.a.</b> establish the limits reserved for strict closure;<br/><b>f.</b> to grant a pardon of exclaustation to a solemnly professed nun, for a period not to exceed<br/><b>one year and according to C. 62.1</b></p> | <p><b>EST 38.</b><br/>The Abbot needs the consent of the absolute majority of his Council to:</p> <p><b>c.</b> to allow a brother to live outside the monastery in the cases referred to in the <b>C.13.3</b>; <b>c bis.</b> establish the limits reserved for strict closure.<br/><b>f.</b> to grant an indult of exclaustation to a solemnly professed monk, for a period of not more than one year and according to <b>C. 62.1</b></p> |
| <p><b>EST 38.</b><br/>The Abbess must first hear her Council when it is a question of:</p> <p><b>h.</b> to extend the period of postulancy beyond twelve months, for a maximum period of two years of postulancy (cf. GC 2022/2 vote 101).</p>                                                                                                                                                                                                                         | <p><b>EST 38.</b><br/>The Abbot must first hear his Council when it comes to:</p> <p><b>h.</b> to extend the period of postulancy beyond twelve months, for a maximum period of two years of postulancy (cf. GC 2022/2, vote 101).</p>                                                                                                                                                                                                    |
| <p><b>EST 39.2.</b><br/>When the number of solemnly professed sisters is reduced to five, the community loses the right to elect its superior. In this case, Fr.</p>                                                                                                                                                                                                                                                                                                   | <p><b>EST 39.2.</b><br/>When the number of solemnly professed members is reduced to five, the community loses the right to elect its Superior. In this case, the</p>                                                                                                                                                                                                                                                                      |

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| <p>Immediately informs the Abbot General and, according to the circumstances <u>and with the authorisation of the Holy See</u>, proceeds to the appointment of a Superior <i>ad nutum</i> or follows the <i>Statute of Accompaniment of Fragile Communities</i>, (GC 2022/2, vow 96; with the addition of the phrase "and with the authorisation of the Holy See," required by the Holy See).</p> | <p>Father Immediate reports immediately to the Abbot General and proceeds to the appointment of a Superior <i>ad nutum</i> or follows the <i>Statute on the Accompaniment of Fragile Communities</i> according to the circumstances. (GC 2022/2, vote 97)</p>                             |
| <p><b>EST 40.</b><br/>The Abbess spontaneously resigns her office on reaching the age of seventy-five. This resignation is always presented to the Abbot General, who transmits it to the General Chapter only in exceptional circumstances. (CG 2022/2, vote 16)</p>                                                                                                                             | <p><b>EST 40 A</b><br/>The Abbot spontaneously resigns his office when he reaches the age of seventy-five. This resignation is always presented to the Abbot General, who transmits it to the General Chapter only in exceptional circumstances. (GC 2022/2, vow 16).</p>                 |
| <p><b>EST 40.</b><br/>The Abbess whose resignation at the age of 75 has not been accepted shall present it again to the Abbot General <b>six months before the next General Chapter</b>. In exceptional circumstances the matter may be passed to the General Chapter. (GC 2022/2, vow 17)</p>                                                                                                    | <p><b>EST 40.</b><br/>An Abbot whose resignation at the age of 75 has not been accepted shall submit it again <b>to the Abbot General six months before the next General Chapter</b>. In exceptional circumstances he may pass the matter to the General Chapter. (GC 2022/2, vow 17)</p> |

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| <p><b>EST46.1.A</b></p> <p>Aspirancy is the stage in which the candidate acquires initial knowledge of the community and the candidate's community, through a series of contacts and moments of community experience. The aspirancy is for a minimum duration of twelve months, but not more than two years. (GC 2022/2, vote 98)</p> | <p><b>EST 46.1.</b></p> <p>Aspirancy is the stage in which the candidate acquires initial knowledge of the community and the candidate's community, through a series of contacts and moments of community experience. Aspirancy is of a minimum duration of twelve months, but not more than two years. (GC 2022/2, vow 99)</p> |
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| <p><b>EST 46.1.</b></p> <p>The postulants are initiated into the spiritual disciplines of the Order which correspond to this period. <b>The postulancy has a minimum duration of twelve months which, according to need, the Abbess may extend after having heard her advice, but it must not exceed two years. (GC 2022/2, vow 100).</b></p> | <p><b>EST 46.1.</b></p> <p>Postulants are initiated into the spiritual disciplines of the Order which correspond to this period. <b>The postulancy has a minimum duration of twelve months which, according to need, the Abbot may extend after having heard his advice, but it must not exceed two years. (GC 2022/2, vow 101).</b></p> |
| <p><b>EST 50.</b></p> <p><u>(...) statute deleted</u></p> <p><i>The Holy See rejected our request (GC 2022/2, vote 105) that the Abbot General continue to have the authority to dispense a nun from one year of novitiate in exceptional circumstances.</i></p>                                                                              | <p><b>EST 50.</b></p> <p>The Abbot General, having heard his Council, may dispense from the second year of the novitiate.</p>                                                                                                                                                                                                            |

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| <p><b>C. 52 Temporary profession 1.</b><br/> By temporary vows the sisters assume the obligations of monastic life for a period of five years (either for <b>three years followed by a period of two years, or for three periods of one year followed by a period of two years</b>). The Abbess may extend this time, but for no more than <b>three years, and ensuring that the twelve years of initial formation are not exceeded</b>.</p> <p><i>The Holy See rejected our request for exemption from Cor orans on this point - GC 2022/2, vote 106.</i></p>                                                          | <p><b>C. 52 Temporary profession 1.</b><br/> By temporary vows the brothers assume the obligations of monastic life, either for three continuous years or for one year, renewable twice. The Abbot may extend this period, but for no more than another six years.</p>                                                                                                                                                                                                                                                                                                                                                       |
| <p><b>C. 58 Lifelong learning</b><br/> After solemn profession, and throughout life, the sisters continue to learn the "philosophy of Christ". <b>Accompaniment is provided for the newly solemnly professed during this particular time of vocational maturation.</b> Ongoing formation will be offered both to the whole community and to individual sisters, according to their own capacity. This formation, always cultivated by the Rule of St. Benedict and the Cistercian patrimony must be enriched by biblical and patristic, liturgical, theological and spiritual science. (<i>GC 2022/2, vote 107</i>)</p> | <p><b>C. 58 Lifelong learning</b><br/> After solemn profession, and throughout life, the brothers continue to learn the "philosophy of Christ". <b>Accompaniment is provided for the newly solemnly professed during this particular time of vocational maturation.</b> Ongoing formation will be offered both to the whole community and to individual brothers, according to their own capacity. This formation, always cultivated by the Rule of St. Benedict and the Cistercian patrimony, should be enriched by biblical and patristic, liturgical, theological and spiritual studies. (<i>GC 2022/2, vow 108</i>).</p> |

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| <p><b>C. 60 Transitus of a sister to another monastery of the Order</b></p> <p><b>1</b><br/>In order that a professed sister may change the monastery of her stability for another, a grave cause is required. Furthermore, <u>except as provided for in paragraph 2 of this Constitution</u>, the consent of the Abbesses of both monasteries and that of the Conventual Chapter of the receiving monastery is necessary. If a sister changed her stability for a foundation when it was erected as an autonomous monastery, she does not need the consent of the Conventual Chapter, if she returns to the house of her former profession. (GC 2022/2, vow 11; the phrase "except as provided for in para. 2 of this Constitution" is added by the Holy See for clarity).</p> | <p><b>C. 60 Transit of a brother to another monastery of the Order</b></p> <p><b>1</b><br/>For a professed brother to change the monastery of his stability, grave cause is required. Furthermore, <u>except as provided for in paragraph 2 of this Constitution</u>, the consent of the abbots of both monasteries and that of the Conventual Chapter of the receiving monastery is necessary. If a brother changed his stability for a foundation when it was erected as an autonomous monastery, he does not need the consent of the Conventual Chapter, if he returns to the house of his former profession. (GC 2022/2, vow 11; the phrase "except as provided for in para. 2 of this Constitution" is added by the Holy See for clarity).</p> |
| <p><b>EST 60.1.</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <p><b>EST 60.1.</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <p><b>EST 60.1.</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <p><b>EST 60.1.</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <p><b>C.60</b></p> <p><b>2</b><br/>In the case of a nun of a suppressed house who wishes to make her stability in the community, the receiving community expresses its willingness to accept this sister by a vote of the Conventual Chapter, taken at the time of acceptance. This vote requires an absolute majority (GC 2022/2, vote 11).</p>                                                                                                                                                                                                                                                                                                                                                                                                                                | <p><b>C. 60</b></p> <p><b>2</b><br/>In the case of a monk from a suppressed house who wishes to make his stability in the community, the receiving community expresses its willingness to accept this brother by _____ means of a _____ vote _____ of the Conventual Chapter, taken at the time of acceptance. This vote requires an absolute majority (GC 2022/2, vote 11).</p>                                                                                                                                                                                                                                                                                                                                                                    |

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| <p><b>C.62 Enclosure 1</b></p> <p>The Abbess, with the consent of her council, may grant an indult of exclaustation to a solemnly professed nun, for a period not exceeding one year, having obtained the consent of the ordinary of the place where the nun is to live, and after</p> | <p><b>C.62 Enclosure 1</b></p> <p>The Abbot, with the consent of his council, may grant an indult of exclaustation to a solemnly professed monk, for a period not exceeding one year, having obtained the consent of the ordinary of the place where the monk is to live, and after having consulted with the monk's council, and after having obtained the consent of the ordinary of the place where the monk is to live.</p> <p>to the Immediate Parent. An extension of this</p> |
| <p>having consulted the Immediate Father. An extension of this indult of exclaustation may be granted by the Abbot General, with the consent of his council, for a period not exceeding four years. (GC 2022/2, vote 88)</p>                                                           | <p>pardon of exclaustation may be granted by the Abbot General with the consent of his council for a period not exceeding four years (GC 2022/2, vow 90).</p>                                                                                                                                                                                                                                                                                                                        |

**C. 67 Accompanying Fragile Communities and Suppressing a Monastery**

**1**

When a community experiences a situation of serious fragility, it deserves special attention from the Order, principally from the Immediate Father and the General Chapter. The process of accompanying communities in these situations is described in the *Statute for the Accompaniment of Fragile Communities and the Suppression of a Monastery* approved by the General Chapter.

**2**

Where, despite this assistance, a community remains in a situation of increasing fragility e irreversibile fragility, it will be

It is necessary to abolish them, as provided for in the *Statute* itself.

**3**

Only the General Chapter, by a two-thirds majority, can ask the Holy See to suppress an autonomous monastery (CIC c.616). § 4). The process to be followed by the General Chapter is described in the *Statute for the Accompaniment of Fragile Communities and the Suppression of a Monastery*.

**C. 67 Accompanying Fragile Communities and Suppressing a Monastery**

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When a community experiences a situation of serious fragility, it deserves special attention from the Order, principally from the Immediate Father and the General Chapter. The process of accompanying communities in these situations is described in the Statute for the Accompaniment of Fragile Communities and the Suppression of a Monastery approved by the General Chapter.

**2**

When, despite this assistance, a community remains in a situation of increasing and irreversible fragility, it will be necessary to abolish it, as provided for in the same statute.

**3**

Only the General Chapter, by a two-thirds majority, can decide on the suppression of an autonomous monastery. The process to be followed by the General Chapter is described in the *Statute for the Accompaniment of Fragile Communities and the Suppression of a Monastery*. (GC 2022/2, vote 12).



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| <p>(GC 2022/2, vote 12)</p>                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <p><b>C.75 The Regular Visit</b></p> <p><b>1</b><br/>The monasteries are visited by the Immediate Father, however, the Abbot General may visit them. The Immediate Father delegates another person to make the visitation at least every six years. Before the Abbot General or the Immediate Father delegates a Visitor, he hears the opinion of the Abbess of the monastery to be visited, who in turn consults her community.</p> | <p><b>C.75 The Regular Visit</b></p> <p><b>1</b><br/>The monasteries are visited by the Immediate Father, however, the Abbot General may visit them. <b>The Immediate Father delegates another person to make the visitation at least every six years.</b> Before the Abbot General or the Immediate Father delegates a visitor, he is to hear the opinion of the Abbot of the monastery to be visited. <b>(GC. 2022/2, Vow 24)</b></p> |

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| <p>EST 75.2.</p> <p>The Visitor Delegate may be Superior or Superior of an autonomous monastery, or a former Abbot (Prior), a former Abbess (Prioress), a Councillor (Councillor) of the Abbot General. In these cases, both the Abbot General and the Immediate Father consult the Abbess of the monastery to be visited, who in turn consults the community.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <p><b>EST 75.2.</b></p> <p>The delegated Visitor may be the Superior of an autonomous monastery of nuns or of monks. The delegated Visitor may also be a former Abbot or Prior, or a former Abbess (Titular Prioress) and also a counsellor of the Abbot General. In these cases, both the Abbot General and the Immediate Father consult the Abbot of the monastery to be visited, who in turn consults the community. (see GC 2022/2, vow 23) To be ratified in GC 2025.</p> |
| <p><b>EST 84.1.C</b></p> <p>The Abbot General needs the consent of his Council for the validity of the legal acts of the following acts:</p> <ul style="list-style-type: none"> <li><b>h.</b> to grant an indult of exclaustation to a sister of the Order, for no more than four years, according to Cst. 62.1;</li> <li><b>i.</b> to ask the Holy See, at the request of an Abbess, to impose exclaustation on a sister;</li> <li><b>j.</b> to grant, for a grave cause, dispensation from vows to a professed sister in temporary vows;</li> <li><b>k.</b> to allow, for grave cause, the elevation of a priory to a higher rank (cf. <i>Statute of Foundations</i>, no. 18);</li> <li><b>l.</b> to grant, in urgent cases, the cancellation of a foundation (cf. <i>Statute on Foundations</i>, no. 20).</li> </ul> | <p><b>EST 84.1.C</b></p> <p>The Abbot General needs the consent of his Council for the legal validity of the following acts:</p> <ul style="list-style-type: none"> <li><b>h.</b> To grant an indult of exclaustation to a monk of the Order, for no more than four years, in accordance with C. 62.1;</li> </ul>                                                                                                                                                              |

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| <p><b>EST 84.1.</b><br/>The Abbot General must hear his Council to:<br/>-----</p> <p><b>a.</b> appoint the Postulator General to promote the causes of beatification and canonisation entrusted to him by the Order;</p> <p><b>b.</b> submit to the Holy See a request for the departure of a nun from vows solemn (Cf. C 64);</p> | <p><b>EST 84.1.</b><br/>The Abbot General must hear his Council to:</p> <p><b>a.</b> to dispense a novice from the second year of novitiate;</p> <p><b>b.</b> to appoint the Postulator General to promote the causes of beatification and canonisation entrusted to him by the Order;</p> <p><b>c.</b> Submitting to the Holy See the request for the departure of a monk from vows solemn (Cf. C.64)</p> |
| <p><b>c.</b> to submit to the Holy See a request for the exclaustation of a nun for a period longer than that provided for in C. 62.1.</p>                                                                                                                                                                                         | <p><b>d.</b> to submit to the Holy See a request for the exclaustation of a monk for a period longer than that provided for in C. 62.1.</p>                                                                                                                                                                                                                                                                |

### III COMMENTARY

#### 1. Motivation for the changes introduced

The changes and innovations that have taken place in our Constitutions and Statutes are due:

- To the application of the Instruction Cor Orans, which is mandatory for nuns.
- The voluntary adoption by the monks of some of the rules of Cor Orans.
- A the reflection of Chapter General Chapter 2022 on some points, independently of the prescriptions of Cor Orans.
- The need to establish at the constitutional level some rules to make possible the application of the Statute of Accompaniment to Fragile Communities.
- The need to establish at constitutional level some standards for the protection of minors and vulnerable adults.

#### 2. Final assessment of the reception of Cor Orans in our own right and the dispensations obtained.

##### a. General considerations

The fact that the OCSO has a General Chapter, in which the Superiors of the Order participate collegially, and the consideration of the rich juridical-pastoral experience that the nuns and monks of the Order have lived together since Vatican II, contrary to what many had hoped, has not been considered by the Holy See as a

reason to prevent the nuns of the Order from having to follow the prescriptions of the Instruction Cor Orans, however, the dispensations that have been obtained precisely because of their full membership in a structure of communion and government.

Cor Orans, as an instruction applying the Apostolic Constitution of Pope Francis *Vultum Dei quaerere*, affects, as passive subjects of law, all the nuns of the Catholic Church of the Latin rite without exception. To deny this reality or to insist on obtaining dispensations, which have already been denied to us, with regard to points that are considered fundamental to this instruction would seem to me to be unwise and unfruitful.

The aspiration to achieve maximum equality between the law of the nuns and that of the monks has an easy solution: that the monks voluntarily assume what is prescribed for the nuns. This idea, which may seem "pilgrim", is in fact what has happened. For example, in the assumption and duration of the aspirancy of the monks, the duration of the postulancy of the monks, the rule that when there are five solemn nuns, the right of election is lost, etc.

**b. A few points to note that would merit comment**

**1. Regarding initial training**

- Nuns and monks have accepted one year of aspirancy and one year of postulancy, both not to exceed two years.
- In its response of 11 August 2023, the dicastery says that: "The faculty of the Abbot General to dispense can be maintained, but only in individual cases and for serious documented causes already foreseen by proper law, and limited to periods of aspirancy or postulancy, but not of novitiate or juniorate". However, this possibility has not been taken up in our constitutions, probably because the number of requirements demanded "only in individual cases, for serious, documented causes, and provided for by proper law" is dissuasive.
- It has not been possible to obtain that, in certain cases, a novice can obtain a dispensation of one year of novitiate from the Abbot General. According to Cor Orans, the novitiate of the nuns lasts two years, the second year being the canonical year.
- It was not possible for the nuns to obtain only 3 years of temporary profession, the time of temporary profession is five years for the nuns.

**2. Regarding monastic enclosure**

- The title of C. 29 "Separation from the world: monastic enclosure" has been changed.
- The provisions of Cor Orans apply: it is up to the abbess to give permission when, for an appropriate cause, strangers enter or nuns leave: the time limit for the nun to leave and the permitted reasons for leaving must be indicated.
- However, in the specific observations of the Holy See (11 August 2023) it is expressly requested that the previous wording of C. 29 be maintained for nn. 4-8. I have doubts as to whether this indication has been followed exactly.

### **3. Leaves of absence and exclaustrations**

- By concession of Cor Orans, the abbess can now grant one year's leave of absence and the first year of exclaustration.
- It has been requested and obtained that the Abbot can also grant the first year of exclaustration, a power he did not have.
- The second response of the Dicastery, August 2023. It granted that the AG could prolong the year of exclaustration granted to a nun by the Abbess for up to four more years. This faculty was granted to the GA, like all Superiors General, only for monks, since the Motu Proprio *Competentias quasdam discernere*, article 5, 11 February 2022, which modified the CIC - 686 § 1.

### **4. Loss of the right to elect a superior when the community is reduced to 5 solemnly professed sisters.**

This prescription of Cor Orans for the nuns has also been taken up by the monks.

### **c. Implications of Cor Orans for the Foundations Statute.**

According to the DIVCSVA's reply of 11 August 2023, some of the requested exemptions are not accepted, and the text of the Statute of Foundations will have to be adapted on a number of points. The issue is still under consideration by the Law Commission.

## AFFILIATION

### I What does Affiliation consist of, according to Cor Orans nn 54-64?

#### 1. Context

Affiliation appears for the first time in the texts of the common monastic law of nuns as a norm emanating from the Holy See in the Apostolic Constitution of Pope Francis *Vultum Dei quaerere* (29 June 2016), specifically in the operative part, Art. 8 §3, as a possibility in the "process of accompaniment to revitalise the monastery or to lead it towards closure" (VDq Art 8 §2), and so it is stated in Art. 8 §3:

"This process could also envisage **affiliation** to another monastery or entrust it to the President of the federation, if the monastery is federated, with its Council. In any case, the final decision rests with the Congregation for Institutes of Consecrated Life and Societies of Apostolic Life".

This affiliation is then developed legislatively in the Cor Orans Application Instruction, specifically in numbers 54 to 64, which is section III of Chapter I of Cor Orans, entitled *The autonomous monastery*. It deals with the foundation of a monastery, its canonical erection, affiliation, transfer, suppression, ecclesial supervision of the monastery and the relations between the monastery and the diocesan bishop.

#### 2. Nature and purpose of membership

It is a special form of assistance established by the Holy See in particular situations for a monastery "sui iuris" *which presents only an apparent autonomy, but in reality is very precarious or, in fact, non-existent* (n. 54).

This aid has a *legal character* (n.55).

The purpose of affiliation is to help the affiliated monastery to overcome the difficulties or to make the necessary arrangements to eliminate them (cf. n.55). Therefore, during the affiliation *it is necessary to evaluate whether the inability to manage the autonomous monastery in all its dimensions is temporary or irreversible* (n. 55).

In addition, the Holy See has the possibility of setting up an "ad hoc" commission. (n. 56) whose formation will be different from that provided for in Cor Orans, n. 56 in the case of a monastery belonging to a monastic congregation. Let us note that this is a possibility, it will not always be necessary to constitute it, although it certainly seems very convenient.

### 3. Legal effects of membership

#### 3.1. In terms of autonomy

- a. **Suspension of autonomy (n. 57)** According to Cor Orans only the Holy See can suspend the autonomous *status* of a monastery of nuns. It is logical that only the Holy See can suspend the autonomy it granted.
- b. **Juridical dependence on another monastery (n. 58)** The Holy See makes the (affiliated) monastery dependent - until otherwise provided - on another (affiliated) monastery of the same institute. It can do this according to the provisions of Cor Orans, just as it can make other provisions in a given case.
- c. **The major superior of the affiliated monastery becomes also the major superior of the affiliated monastery (n. 59)** with all the consequences.
- d. **Appointment of a local superior (n. 59)** "The local superior of the affiliated monastery is a solemnly professed nun appointed *ad nutum* by the major superior of the autonomous monastery".

It is very important to note that here the expression "ad nutum" simply means "appointed". In no way does it mean that the local superior has the powers that our constitutions give to the superior ad nutum, who has the character of major superior. A local superior is simply appointed, without the character of major superior, since the major superior of the affiliated monastery is the same as that of the affiliated monastery.

#### Procedure for the appointment of the local superior (n. 59)

The major superior of the affiliated monastery appoints the local superior:

- With the consent of the board (of the affiliated house)
- After hearing the opinion of the nuns of the affiliated monastery community

The appointed local superior becomes the legal representative of the affiliated monastery. This means that in practical matters she represents the community before the civil institutions. However, she cannot perform the acts of administration that belong to a major superior without the consent of the person who exercises this authority in the monastery.

#### 3.2. On the admission of candidates and training

- a. **Initial formation (n. 60)** The affiliated monastery may receive candidates. However, the monastery ceases to be the seat of formation, it has no novitiate. Therefore, the novitiate and initial formation, temporary professed, takes place in the affiliated monastery or in another monastery established by the federation (or by the monastic congregation).

**b. Procedure for the admission of candidates (n. 61)** Candidates received by the affiliated monastery:

- They are admitted to the novitiate by the major superior of the affiliated monastery.
- They are admitted to temporary profession by the major superior of the affiliated monastery. - They are admitted to solemn profession by the major superior of the affiliated monastery.

And it can do so (n. 61) after:

- **To hear the opinion** of the community of the affiliated monastery.
- **To hear the opinion** of the community of the affiliated monastery.
- After the favourable **vote** of the conventual chapter of the **affiliated** monastery.

**c. Profession.** Profession is made for the **affiliated monastery** (n. 62) and the Major Superior receives profession.

### **3.3. Administrative management**

**The two houses are administered separately** (n. 63). During the time of affiliation the finances of the two monasteries are administered as two distinct entities. This means that each monastery has its own bank accounts and its own bookkeeping.

### **3.4. Conventual chapters**

In the affiliated monastery the celebration of **conventual chapters** is **suspended**, but the possibility of convoking local chapters remains (n. 64). That is to say that the affiliated community can have a daily or weekly meeting, etc., but as a consequence of the suspension of autonomy it cannot be constituted as a conventual chapter with canonical or civil juridical effects.

### **3.5. New relationships established through affiliation**

- a. Between the community of the affiliated monastery and the community of the affiliated monastery. The affiliated monastery becomes a dependent house of the affiliated monastery.
- b. Between the local superior of the affiliated monastery and the major superior (who is the same as the major superior of the affiliated monastery) there is a relationship of subordination.
- c. Between the candidates of the affiliated monastery and the formation house (novitiate - juniorate) which is in the affiliated monastery or in another monastery established by the federation or by the monastic congregation. The candidates are not trained in the house for which they will one day make their profession. This does not prevent them



from spending certain periods of time in the monastery in which they entered and in which they will make their stability.

- d. Between the major superior and the community of the affiliated monastery at the level of governance, formation - initial and ongoing - and administration. The major superior determines, together with the community of the affiliated monastery,

## **II. Votes taken at the General Chapter September 2022**

The General Chapter approved *ad experimentum* a text presented by the law commission which is essentially the adaptation of the affiliation in Cor Orans, nn. 54 -64 to the institutions of the Order.

**VOTE 72:** WE APPROVE THE IMPLEMENTATION AD EXPERIMENTUM OF "AFFILIATION" ACCORDING TO THE TEXT STUDIED AT THE GENERAL CHAPTER OF 2022 (GENERAL BOOK, P. 64-65) UNTIL THE GENERAL CHAPTER OF 2025.

***PLACET 130***  
*Proposal accepted*

***NON PLACET 13***

***ABSTAIN 8***

**VOTE 73:** WE CALL FOR A FURTHER STUDY OF "AFFILIATION" IN THE REGIONS BEFORE THE CENTRAL COMMISSION 2024.

***PLACET 133***  
*Proposal accepted*

***NON PLACET 10***

***ABSTAIN 7***

## **III. Text submitted to GC September 2022, adaptation of the Affiliation according to Cor Orans to the OCSO.**

The working document submitted by the law commission appeared in the General Book for GC September 2022, pages 63-65. The text was approved *ad experimentum*.

The text itself is preceded by a brief explanation of the key features of membership and the possibilities offered by membership.

It should be noted that in this document the functions which in the Affiliation are attributed by Cor Orans to the Holy See, are assumed by the General Chapter without the need for consultation or authorisation. It is likely that when it is presented for approval, the Holy See will want to reserve certain functions to itself if the affiliation applies to a monastery of nuns, unless it decides to apply the principle of subsidiarity in this case, entrusting everything to the General Chapter.

## **E5: Membership**

The structure of Affiliation outlined in Cor ornas 54-64 is now universal law, and we must provide a way to allow for this option within our own legislation.

As this issue has not been previously studied, the Law Commission provided this working document. If the text is accepted, it can be inserted into the *Fragile Communities Accompanying Statute*.

### **WORKING DOCUMENT ADAPTATION**

#### **TO THE ORDER'S INSTITUTIONS**

#### **THE INSTRUMENT OF AFFILIATION ACCORDING TO COR ORNAS (nos. 54- 64)**

##### **FUNDAMENTAL CHARACTERISTICS:**

- When a monastery is in a situation of advanced fragility, it can request that another community of the Order take charge of this community by taking it under its care. See establishes a bond of dependence and mutual aid in partnership.
- The affiliation status is a temporary measure: it is reversible if the fragile community is revitalised, or the affiliation ceases because it is decided to suppress the monastery. As a consequence of affiliation, the exercise of autonomy in the affiliated community is suspended. The fragile house becomes temporarily a dependent house of another house of the Order.
- If there are candidates in this fragile community, they are trained in the affiliated house. ➤ The finances of the two monasteries are managed separately.

##### **POSSIBILITIES OFFERED BY MEMBERSHIP:**

It is a possibility offered to us by the Holy See and we can use it because it is already approved.

- In the case of a monastic commissary, it is a single person who is in charge of a community, whereas in the case of affiliation it is a whole community that takes over the responsibility for another community, thus providing more stability.

□ □ □ □ □ □ □ □ □ □ □ □ has been talk of the possibility of transforming one monastery into a house attached to another. But, in that case, the community would first have to be suppressed and its members would have to be accepted into another community that allows them to live as an annexed house, which is an irreversible step. In the case of an affiliation, it is very different, as the more fragile monastery is not suppressed, but continues with its juridical personality, even if part of its autonomy is suspended, and this is always a reversible situation.

It facilitates a possible future merger by having promoted a close relationship between the two communities.

TEXT:

a- Next to each of the numbers is the parallel quotation from Cor Orans

b - The institution of the Order that assumes the functions attributed to other authorities in CO is shown in bold.

c- In red and underlined, the CO texts are completed in order to answer some of the questions posed.

1. (CO 54) Affiliation is a special form of assistance which the **General Chapter** establishes in particular situations in favour of the community of an autonomous monastery which has only apparent autonomy, but in reality is very precarious or, in fact, non-existent.
2. The request for this special form of assistance may be presented at the free initiative of the community experiencing increasing fragility or by the Immediate Father of that house, or it may arise from the study of the situation of the community in the General Chapter itself. Only the General Chapter is competent to decide to establish it, after consultation with the fragile community and the community which would be available to provide this service. In the time between General Chapters, when the case is urgent, it may be established by the Abbot General and his Council after the same consultations. Consultation of the communities concerned does not necessarily require a vote or a specific majority.
3. (CO 55) Affiliation is a legal aid that should assess whether the inability to manage the life of the autonomous monastery in all its dimensions is only temporary or irreversible, helping the community of the affiliated monastery to overcome the difficulties or to make the necessary arrangements to abolish the monastery.
4. (CO 56) It is for **the General Chapter**, in such cases, to ~~study the possibility of~~ setting up a **Future Commission composed** of the Superior of the affiliated monastery and at least two other persons appointed by the **General Chapter**.
5. (CO 57) With affiliation, the **General Chapter** suspends the *status* of an autonomous monastery, making it *donec aliter provideatur* (until otherwise decided) a dependent house of another autonomous monastery of the Order, according to the provisions of the present Instruction and other possible dispositions in this regard given by the **General Chapter**.
6. (CO 58) The major superior of the affiliated autonomous monastery becomes the major superior of the affiliated monastery.
7. (CO 59) The local superior of the affiliated monastery is a monk in solemn vows, appointed by the major superior of the autonomous monastery, with the consent of the respective council, after hearing the opinion of the monks/nuns of the community of the affiliated monastery. This local superior becomes the legal representative of the affiliated monastery and his function is limited to managing the ordinary daily life of the community according to the indications of the major superior.
8. (CO 60) The affiliated monastery may receive candidates but the novitiate and initial formation must take place in the affiliated monastery or in another monastery established by the General Chapter.

9. (CO 61) Candidates of the affiliated monastery are admitted to the novitiate, novices to temporary profession and temporary professed to solemn profession by the major superior of the affiliated monastery, after hearing the community of the affiliated monastery and obtaining the favourable vote of the conventual chapter of the affiliated monastery.
10. (CO 62) Profession shall be issued for the affiliated monastery.
11. (CO 63) During the time of affiliation, the finances of the two monasteries are administered separately.
12. (CO 64) In the affiliated monastery, the holding of conventual chapters is suspended, but the possibility of convening local chapters remains.
13. **In the affiliated monastery the regular visitation is made by the same visitor who makes the regular visitation of the affiliated monastery. As long as this juridical form continues, the functions of the Immediate Father of the affiliated house are assumed by the same person who is the Immediate Father of the affiliated monastery.**
14. Affiliation ends when, in the judgement of the General Chapter, the fragile community has sufficiently recovered its real autonomy of life, or when it is judged that the situation of fragility is irreversible and the monastery must be suppressed.



### **Audit of the financial and economic situation**

*"Accountability, transparency and the maintenance of trust are interconnected principles: there is no accountability without transparency, transparency generates trust, and trust verifies both*

#### **Preparation**

1 As a rule, the regular Visitation begins with an audit of the economic and financial situation by the financial auditor(s) in accordance with Constitutions 41-43 and the Statute on Temporary Administration (see Appendix A). They collect and evaluate information concerning the economic and financial situation of the monastery. With the help of this knowledge, the canonical Visitor(s) evaluates the financial situation of the monastery in order to recommend or order, if necessary, appropriate measures.

2. The financial auditor(s) are appointed by the Canon Visitor, after consultation with the Superior, who will consult the Economic Council.

3. Companies, foundations or other subsidiaries, non-profit associations (NPOs) or other legal entities in which the monastery has a shareholding of at least 40% of the capital or in which the monastery has a veto right are also subject to the Economic Visitation and thus to the financial audit.

4. When preparing the financial audit, the appointed auditors announce their visit well in advance. At the same time, they request the documents necessary to prepare the audit (see Appendix B). The Superior is responsible for ensuring that these documents are sent to the auditors in good time. Depending on the circumstances, the financial auditors may also request additional information if this is necessary to assess the finances of the Abbey. The other documents must be kept available for the auditors.

#### **During the audit**

5. The documents must be submitted to the financial auditors on arrival by or on behalf of the Superior. The financial auditors may request additional documents concerning the financial and legal situation of the Abbey. They have access to all departments and may interview members of the Pastoral Council or the Economic Council, members of the community and employees. All are obliged to support the financial audit and to provide information voluntarily and truthfully (CIC 628.3). The Superior is responsible for the proper conduct of the financial audit. As a general rule, the Chaplain is responsible for the practical details.

6. Secrecy must be respected by all.

7. If difficulties or disagreements arise between the monastery and the auditors regarding the conduct of the audit, the auditors consult the Canonical Visitors, who have the power to decide and take appropriate action.

#### **Closing the audit**

8. On completion of the financial audit, the auditors shall draw up an audit report, the content and form of which shall be based on the model printed in Annex C. The audit report shall

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<sup>4</sup> DIVCSVA, The Economy at the Service of Charism and Mission, Vatican, 2018. N° 41...  
<http://www.cultura.va/content/dam/cultura/docs/pdf/beniculturali/carisma/ECONOMi.pdf>

should contain an analysis of the situation and recommendations on appropriate measures. These measures can be, for example, closure of services, dismissal of officials, other personnel changes, limitation of loans, cancellation of illegal acts, revision of spending limits. These measures only become legally binding if the Visitors include them in the report in the form of mandates or recommendations.

### **Communication of results**

9. The financial auditors send the audit report to the Visitors. The Visitors will add the financial auditors' report to the Letter of Visitation. In addition, it is recommended that the financial auditors discuss their findings with the Visitors to ensure that they really understand the economic and financial situation of the monastery and can take appropriate action.

10. As a general rule, the Superior of the monastery and the members of the community should also be involved in the financial audit in an appropriate way. This ensures that the Superiors and the community are informed about their own financial situation. This helps them to decide on new projects or future investments. At the same time, this information to the community provides the Canonical Visitors with a basis for discussing the financial situation more extensively, if necessary.

## **ANNEX A Constitution and Statute**

### **Chapter 3: MANAGEMENT OF TEMPORARY ASSETS**

#### **C.41 Temporary assets of the monastery**

1 Fidelity to the Cistercian traditions requires that the regular income of the community come principally from the fruit of its work. Each brother has the right and the duty to serve the community by participating in its work according to his strength and taking into account the economic structure of the monastery.

2 As steward of God's household, the abbot is responsible for administering the goods of the monastery and regulating their use in such a way as to meet the human needs of each person, while remaining obedient to the law of the Gospel. The community adheres faithfully to the Church's teaching on social justice and, in the management of its affairs, avoids anything that might support a structure of oppression.

3 According to a centuries-old tradition, a part of the monastery's income is earmarked, as far as possible, for the needs of the Church and the relief of the needy.

#### **C.42 Legal status**

By law, the Order itself and the individual monasteries are juridical persons capable of acquiring, owning, administering and disposing of temporal goods.

#### **C.43 Ordinary administration**

1 The abbot appoints a Cillerero who is responsible for the ordinary temporary administration of the monastery. Normally, apart from the abbot, only the Cillerero is authorised to make valid expenditures and legal acts on behalf of the monastery. However, the abbot may also entrust certain management activities to other brothers, specifying the limits of their authority and their duties in financial matters. All these managers are responsible to the abbot.

#### **ST 43.1.**

The monastery keeps accounts according to the system in use in the place where it is located. The accounts are periodically examined by an expert.

### **ST 43.1.**

The abbot's consent is required to invest money. These investments must be managed prudently. Speculation is forbidden.

### **ST 43.1.C**

The members of the Order may under no circumstances grant rights to third parties to use the terms "Trappist", "Trappists" and their derivatives. Every effort is made, using the legal means available in each country, to prevent or put an end to any usurpation, imitation or abusive use of these names. We also avoid transferring or granting rights to use any title (trademark, trade name or other) derived from the name of a monastery or composed of terms such as "abbey", "monk", "monastery" and the like.

2 The monastery has a financial council with which the abbot periodically examines the financial situation of the monastery.

3 The administration of temporal goods is examined during the ordinary Visitation.

### **ST 43.3.**

The accounts of the monastery must be shown to the Visitor. Every four years they must be examined by a truly expert person before the Visitor signs them. If the Visitor finds that the financial situation of a monastery is alarming, he informs the Abbot General and, if he is the delegated Visitor, the Immediate Father.

## **STATUTE OF THE TEMPORARY ADMINISTRATION**

*as approved by the 1999 General Chapters and  
amended by the 2002 General Chapters  
in Nos 13, 21 and 33.d*

1. The whole organisation of the monastery is intended to unite the monks intimately to Christ, because only in the intimate love of each one for the Lord Jesus can the special gifts of the Cistercian vocation flourish. The brothers will only be happy in the simple, hidden and laborious life if they put absolutely nothing before Christ (C. 3.5). For this reason the monastery's finances must be organised in such a way that its members can live the values proper to their Cistercian vocation.

## **INTRODUCTION**

2. The present Statute, elaborating in more detail what our Constitutions say about temporal administration (C. 41-44), establishes appropriate norms concerning the use and administration of the temporal goods of the communities, in accordance with our Cistercian tradition and the norms of Canon Law. It seeks to promote a common interpretation of the Constitutions and to assist those responsible for their management. It is up to each monastery to apply and update these norms, in agreement with the Immediate Father and in conformity with the local culture, situation and tradition.

## **I. THE COMMUNITY**

3. The monasteries of the Order are juridical persons capable of acquiring, possessing, administering and alienating temporal goods (can. 634 '1; 1255; C. 42).

4. As far as possible, care should be taken to ensure that civil law recognises the monastery as a legal person, so that monks do not need to hold monastery property, bank accounts, shares, financial securities, etc. in their own name.



5. Each brother has the right and the duty to serve the community, assuming his share of its work according to his possibilities and the economic situation of the monastery (C. 41.1). He is exhorted to attend to and encourage the development of its finances.

## II. COMMUNITY PROPERTY

6. **Acquisition.** While it is permitted to each community to procure temporal goods by all just means (can. 1259), fidelity to the Cistercian tradition requires that the ordinary income of the community should come, as far as possible, from the fruit of its work (C. 41.1).

7. **Use.** In the use it makes of its goods, each community should respect the demands of evangelical simplicity as well as the prescriptions of the Church. Following the example of the Fathers of Cîteaux who cultivated a simple relationship with the most simple God, the lifestyle of the brothers should be simple and frugal. In the house of God everything should be arranged in accordance with the monastic life, avoiding superfluity in everything, so that simplicity may be taught to all and appear clearly in the buildings and furnishings, in the food and clothing, and even in the liturgical celebrations (can. 635 ' 2; C. 27). The monastery should stand out for its beauty and simplicity (ST 27. A; can. 634 ' 2). As far as it is able, the community should allocate a part of its own resources to the needs of the Church and the Order, and to the relief of the needy (can. 640; C. 41. 3).

8. **With regard to the temporal goods of postulants and novices,** the prescriptions of universal law are to be observed. The Abbot sees to it that the civil laws of the country are applied.

**a.** Prudence requires that the postulant sign, at his entrance, the renunciation of all salary for the work he does during his stay in the monastery. **b.** Before temporary profession, the novice must cede to whomever he wishes the administration of his goods, and freely dispose of their use and usufruct during the time of his commitment (can. 668 ' 1-3; C. 52. 2). **c.** The temporary professed retains the ownership of his goods and the ability to acquire new ones. But whatever he receives for his work, or in consideration of his religious state, or by way of pension, grant or insurance, belongs to the monastery (can. 668 ' 3). **d.** Since the brother, by his solemn profession, loses the capacity to acquire and possess goods, if he has them or enjoys the right to receive them, he must distribute them to the poor or dispose of them in some other way, according to canon 668 ' 4-5. Let him make this renunciation before solemn profession, so that it is valid from the day he makes it and is also valid, as far as it is feasible even in civil law. Whatever he receives after the renunciation belongs to the monastery (C. 55). **e.** Before his solemn profession he shall also draw up a will in favour of the monastery, which, as far as possible, has value in civil law (canon 668 ' 1), so that in case of death his situation can be easily regularised (pension arrears, royalties, etc.).

9. **The Oblate** retains radical ownership of his goods, but he is invited to free himself as much as possible from their administration. In case of impossibility, he administers them in agreement with the abbot who watches over the interests of the Oblate and also so that the community does not suffer any harm, taking legal steps to ensure the appropriate guarantees. If necessary, an expert in social law will be consulted (Statute of the Oblates, 2).

10. **Relatives.** In the case of a particular status, for example for a relative, it would be good to establish a contract signed by both parties before a notary, according to local legislation, clearly mentioning the reciprocal obligations of the monastery and the person concerned.

11. **Those who leave** or are dismissed can claim nothing from the monastery for the services they have rendered. However, the abbot will observe with them the norms of evangelical equity and charity (can. 702; C. 59. 2). In order to safeguard both the good of the members who leave or are dismissed and that of the community, the abbot is to be well informed of the social laws of the place where the monastery is located (ST 59. 2. A).

### III. THE ADMINISTRATORS OF THE COMMUNITY PROPERTY

**12. The Abbot**, as guardian of the House of God, is primarily responsible for the entire material administration of the community. He shall exercise this part of his office in the light of the Gospel (C. 41. 2), the Holy Rule, Canon Law, the Constitutions of the Order and the present Statute. This function is only part of the Abbot's pastoral mission and not his primary concern. Hence the need to share his responsibility in this regard.

**13. The treasurer.** The Abbot appoints a treasurer for the ordinary administration of the monastery. Ordinarily he alone, in addition to the Abbot, may validly carry out the expenses and juridical acts in the name of the monastery (C 43.1). The Abbot may, however, entrust *the functions* traditionally assumed by the treasurer to several persons, one of whom may have *the title* of treasurer (*vow 13*).

**14. Other administrators.** The abbot entrusts to other brothers the responsibility of administering one or other of the monastery's offices, or management activities, under the general coordination of the treasurer or the economic council, determining the limits of their authority and their positions in the financial sphere. All these officials must finally give an account of their management to the abbot (C. 43. 1).

**15. Council of finances.** Each monastery is to have a finance council (C. 43. 2), consisting of at least two members, elected by the conventual chapter or by the abbot, according to local custom (can. 1280). The treasurer is a member of this council. The role of this financial council, which the abbot convenes at certain times (can. 636 ' 2), and with which he periodically examines the financial situation of the monastery (C. 43. 2), is to assist the various administrators in the fulfilment of their respective tasks (cf. 27d).

**16. The good steward.** All those who exercise a task of administration must carry it out with the diligence of a good administrator. Canon 1284 provides a useful list of the duties incumbent on them.

### IV. THE ADMINISTRATION OF COMMUNITY PROPERTY

**17. Legal titles.** The ciller, or a brother appointed by the Abbot, ensures that all legal titles to property are properly preserved and, when required, updated; he also has the task of keeping them properly inventoried and securely stored (can. 1284 ' 2-9).

**18. Property.** The ciller, or another brother appointed by the Abbot, is diligently engaged in the proper maintenance of the monastery property. The brothers are to take care of the monastery's surroundings and prudently administer its natural resources (ST 27. A).

**19. Organisation of work.** The economy of the monastery must be organised in such a way that its members can live the values proper to their Cistercian vocation (C. 2; 3; 14. 2; 16; 19; 20; 21; 25; 26; 27; 29; 35). To this end, it is absolutely necessary to have a proper organisation of the work and services to be performed by the various members of the community. Their respective competencies and their various responsibilities must be precisely determined. Timely information and communication facilitate the work and enhance communion.

**20. Contracts** are to be made according to legal norms (can. 1290-1298). Care is to be taken that all economic transactions made by the monastery have not only a legal but also a moral character (C. 41. 2).

**21. Trademarks.** Under no circumstances may members of the Order assign to third parties the rights to use the trademarks \*Trapa+, \*Trapense+ and their derivatives. They must endeavour to prevent or stop any usurpation, imitation or misuse of these names, using the legal means available in each country. They should also avoid ceding or granting rights of use of any title (trademark, trade name or other), derived from the name of the monastery or composed of \*abbey+, \*monk+, \*monastery+ and the like (ST 43. 1. C). The rights of other monasteries and other Regions should be respected. *The rights in question include all rights of ownership of trademarks identifying the Order, as is the case, under civil law, of a civil society owning a trademark. The region receiving imports is also responsible for judging what is appropriate in matters of publicity, etc., in the context of the local culture (monks, vow 15).*

**22. Money** shall be managed prudently, so that inflows cover expenditures. It is desirable that a policy of financial reserves be put in place with the assistance of the economic council. As far as possible, a reserve should be set aside to cover at least one year's recurrent expenditure.

**23. Investments.** The consent of the Abbot is required for investments of money. This is to be done with prudence. All speculation is forbidden (ST 43. 1. B).

**24. Bank accounts.** The abbot has the power to sign cheques, as do the brothers appointed by him. In certain cases it may be appropriate that, above a certain sum, two joint signatures are required for the cheque to be valid.

**25. Debts.** If debts are to be contracted, they are not to be allowed if there is no certainty that the usual income will enable the interest to be paid and the capital to be repaid within a not excessively long time (can. 639 ' 5).

**26. Taxes.** In accordance with evangelical doctrine, the taxes required by civil society shall be paid. Official documents relating to taxes paid or possible tax exemptions shall be carefully kept.

**27. Ordinary and extraordinary administration.** There are two types of acts of administration (can. 638 ' 1): acts of ordinary administration and acts of extraordinary administration. **a.** The act of ordinary administration is that which an administrator carries out within the framework and limits of his or her ordinary competence. **b.** An act of extraordinary administration is an act that an administrator cannot perform without a special decision-making procedure, involving advice, consent or permission. This special procedure is required when the act exceeds his ordinary competence or certain limits such as: alienation, the need for a loan, the novelty of the transaction, the amount of the sum at stake. **c.** Certain cases are already determined by law: - C. 44. 1 declares alienation and transaction which could diminish the patrimony of the monastery to be an act of extraordinary administration (can. 638 ' 3).

- The permission of the Holy See is required when such an act of extraordinary administration exceeds the sum fixed by the Holy See for each region, or when it concerns donations made to the monastery as a result of a vow, or precious objects because of their artistic or historical value (C 44 ' 2). When the authorisation of the Holy See is required, the consent of the conventual chapter and of the General Chapter must also be obtained (ST 44. 2. A). In case of urgency, the authorisation to be sought from the General Chapter can be obtained in writing from the Abbot General with the consent of his Council (ST 44. 2. B). - The General Chapter determines the sums above which acts of extraordinary administration which do not fall under C. 44. 2 need special permissions to be validly carried out (C. 44. 3). The consent of the conventual chapter and of the General Chapter is necessary for any business which exceeds the sum established by the General Chapter, and also for the construction or demolition of buildings whose value exceeds that sum (ST 44. 3. A). - The consent of the conventual chapter is required for all business which exceeds the lower sum established by the General Chapter and for giving power of attorney in a negotiation.

B). **d.** Each community shall determine in conventual chapter the acts of administration for which the advice or consent of either the conventual chapter or the finance council is required. This determination, which may be reviewed from time to time, must be approved by the Immediate Father. Formulas ("grilles" in French) should be proposed at the level of the regions to help the communities and the Immediate Pastors.

**28. Budget.** It is strongly recommended that budgets of income and expenditure be drawn up each year (can. 1284 ' 3). This budget and its approval procedure should correspond to the degree of complexity of the monastery's economy.

**29. Accounting.** Each monastery has an accounting system (ST 43. 1. A). Whether kept by a member of the community or by a third party, it must be in accordance with local custom and professional standards; its degree of development will depend on the size and complexity of the community's economy. Well-kept accounts are necessary for the proper management of temporary assets and knowledge of the economic state of the community. The accountant is obliged to communicate the accounting situation to those in charge appointed by the Abbot. When a community has assets spread over several legally distinct entities, each of which has its own accounts, it is advisable to draw up a consolidated accounting statement each year, so that the overall situation of the assets can be ascertained. The accounts of the monastery and its profit-making activities must be very clear.

**30. Controls.** The goods under the responsibility of the various administrators are ecclesiastical goods of which they are the managers, they exercise their administration with humility and voluntarily accept the controls necessary for any good management.

**a.** The heads of the various departments report on their administration to their superiors. They must also have access to the accounts that concern them.

**b.** At the end of the year, all accounts are submitted to the Abbot.

**c.** The economic council meets regularly to examine the economic situation of the community, to analyse the financial reports and the budgets. It examines the various projects and their implementation; the abbot's council and the finance council examine the organisation of work.

**d.** At least once a year, the abbot and his appointees report to the conventual chapter on the financial situation as well as on the various activities of the monastery. Regular reporting encourages the participation and co-responsibility of the community. The increasing complexity of economic conditions and civil legislation often makes it necessary to call in outside specialists in various fields. By making prudent and grateful use of the services of these specialists, the community can never relinquish its own responsibility for decision-making.

**e.** In virtue of his general duty of vigilance, the Immediate Father sees to it that this Statute is respected in his daughter houses (C. 74. 1).

**f.** The temporary administration of the monastery is to be examined during the regular visitation (can. 636, 2). The visitor is to be provided with the data necessary for a fair evaluation of the material situation of the monastery: updated accounts, reports of the financial council and expert reports if necessary, etc. Where profit-making activities have a legal structure and accounting separate from that of the community, all accounts are to be examined. At least every four years, these must be examined by a real expert. In some cases, the examination of the financial situation could take the form of an audit carried out some time before the regular visitation by an expert, in order to verify the good state of the monastery's finances. The expert's report, by giving an objective view of the situation, can help, if necessary, to take a decision. The visitor's attention is not limited to economic questions and accounting alone, but also to the broader questions of charity, justice and ethics. If he judges it appropriate, the visitor devotes a paragraph of the Letter of Visitation to the financial situation of the community. **g.** The information given to the Abbot General will mention the finances, without being too detailed. If the visitor becomes aware that the financial situation of a monastery is alarming, he informs the Abbot General, who will take the necessary decisions, and, if he is a delegated visitor, he will also inform the Immediate Father (ST 43. 3. A).

**31. Employees.** The doctrine of the Church and the provisions of civil law on work and social life are to be applied to all employees. They are to receive a just and honest wage, sufficient to meet their needs and the needs of those who depend on them (can. 1286). The policy of the community with regard to its employees is coordinated by the treasurer or the economic council.

**32. The lay administrator.** If in particular circumstances it is necessary to entrust to a lay person some of the responsibilities normally incumbent on the function of the treasurer, the abbot will determine in writing the precise nature and limits of the task of this lay administrator. The abbot must be very attentive to the legal consequences of such a contract and ensure that there is a calm atmosphere in the collaboration between this lay administrator and the brothers. In these circumstances, the role of the finance council is particularly important.

## V. THE ORDER

**33. The Order** is a juridical person capable of acquiring, possessing, administering and disposing of temporal goods (CIC 634 ' 1; 1255; C. 42). In the area of temporal administration, the Abbot General is responsible for the ordinary administration of the Order and the Generalate (ST 82. 2. A and C), and the General Chapter for its extraordinary administration. **a.** The General Chapter has the power to determine what acts of extraordinary administration are to be carried out in the Order. **b.** The Abbot General appoints a member of the Order responsible for the ordinary administration of the Order. He also appoints a finance commission for the administration of the capital of the Order, which submits annual reports to the General Chapter. **c. The ordinary administration of the General House is the responsibility of the Abbot General.** The ordinary administration of the Generalate and the keeping of the accounts of the \*general expenditures+ of the Order are entrusted to the bursar of the Generalate, who presents annual reports to the General Chapter. The administration of the Generalate follows the rules established for the other houses of the Order. The Abbot General determines with his permanent council the contribution of each monastery to the expenses of the Generalate, taking into account the resources of each one (ST 84. 1. G). **d.** According to the prescription of the Letter of Charity (7,4), when some houses of the Order are in need, the communities which have more resources "moved by an ardent charity, will hasten, each according to its means, to help these houses with the resources which God has given them". *A commission studies the requests for help. These requests must be accompanied by a dossier presenting the plan for the use of the funds and indicating the help already requested and/or received from any organisation or community. The commission also manages a mutual aid fund, which is financed by an annual contribution from each monastery. It responds to requests as far as it is able or directs them to communities and organisations which may be able to provide assistance. (vow 86)*

## **ANNEX B**                      **Financial audit checklist**

Please provide the following information before the Visit, thank you!

1. Statistics on the brothers/sisters of the monastery
2. Active monks, retired monks and monks in training, monks and nuns outside the community.
3. Current average age of the community
4. Statistics on current employees/workers (full time and part time)
5. Does the monastery employ (full and part-time) minors?
6. The Economic Council or the Pastoral Council, approved by the Conventual Chapter, defines the maximum amount that officers may spend, without additional authorisation:
  - Abbot up to x.000 euros
  - Cutter up to x.000 EUR
  - Solemnly professed up to x.000 EUR
  - Conventual Chapter up to x.000 EURThis was ratified on xx.xx.20xx.
7. The Economic and Financial Council meets every .....
8. The members of the Economic and Financial Council are: ... When were they elected/appointed?
9. Community legal status/title, registration number: 000, issued on 00.00.20xx, and indicate the legal representative or its legal body (board of directors, trustees, etc.) (registered as non-profit foundation, public company, etc.)
10. Title/legal status of any business activity belonging to the community, registration number: 000, issued on 00.00.20xx, and indicate the legal representative or its legal body (board of directors, supervisory board, etc.).
11. Annual financial statement (balance sheet and profit and loss account) of the Abbey for the last four years.
12. Financial indicators
  - Annual expenditure
    - Total Community expenditure per year for the last 4 years.  
(provide total annual income and expenditure (profit/loss) for each activity separately and then a total.
    - Total expenditure on social projects per year in the last 4 years  
(Please indicate total income and expenditure (profit/loss))  
per year for each activity separately, and then a total).
    - Total expenditure on pastoral care per year in the last 4 years
    - List of all investments made since the last Visit
    - List of all ongoing or planned future investments
- Annual income
  - Total income from own business activity during the last 4 years  
(Indicate annual income and expenditure (profit/loss) per year for each activity separately)
  - Total income from the monastery's commercial activities per year for the last 4 years  
(Indicate the annual income and expenditure (profit/loss) for each business activity separately)
  - Annual income generated by donations and pensions in the last 4 years
13. Provide a list of the persons responsible for each economic or social activity.
14. List of loans granted to third parties.

15. List of loans contracted by the Abbey.
16. List of all financial investments, bank accounts with balances and the list of persons authorised to sign on each account.
17. List of all investments/participations in companies and/or institutions.  
Provide tax and legal information (relevant tax office, tax identification number, registration number, etc.).
18. List of properties and real estate owned, provide information on title deeds, purchase price and size of land and/or building, and date of purchase.  
- Please classify the properties according to their use:  
monastery and church, agriculture, forestry, commercial and social use.
19. List of all leases
20. List of all legal proceedings or litigation in progress
21. Is the administration aware of any form of corruption?  
(*Corruption is the misuse of entrusted power for private gain or advantage. There are many forms of corruption. The most common are embezzlement and personal enrichment*).
22. List of all credit and debit cards and other forms of electronic payment systems (e.g. m-pesa, bitcoin, MobilePay, ApplePay, etc.....).
23. Description of the monks' pension scheme
24. Indicate the total number of mass intentions received and given per year for the last 4 years.
25. What percentage of the profits of the last four years do you dedicate to donations, both inside and outside the Order?

**ANNEX C Please provide the following documents at the time of the Visit:**

- Founding documents / first inscription of the Abbey
- Documents defining the legal status of the Abbey
- If there is a board of directors or equivalent, provide a list of all current registered members and receipts for annual dues.
- Documents defining the legal status of participations/shares in companies and institutions
- Original deeds and annual subscription receipts
- For all members of the community: Your Last Will and Testament
- All external audited financial statements for the last 4 years

**ANNEX D Outline of a financial audit report**

Financial audit XX  
Abbey  
00 April 20xx - 00 April 20xx  
Community Audit Committee P.  
Brother

**A. Common information**

**1. Introduction**

The aim of this report is to give an overview of the economic and financial situation of the communities in view of the Canonical Visitation that will take place in the xth quarter of 20xx.

The last audit was carried out in October 20xx by the PP.

The audit covers the following points

1. Abbey of xx, diocese of xx
2. Monastery of San xx, Diocese of xx

The information has been provided by

:

Xxx Abbot

Xxx Steward

Xxx

Accountant

Xxx

Accountant

## 2. Notes on the recommendations of the last financial audit of 20xx XX

Abbey

... (done, partially done, not done) Xx

Monastery

... (done, partly done, not done)

## 3. Monastery statistics Xx

Abbey

00 Solemnly professed priests

00 Solemnly professed brothers

0 Temporarily professed

brothers 0 Novices

0 Applicants

0 Applicants

The average age of the community is

XX 00 Active Monks

00 Monks in training 00

Retired monks

00 Monks outside the

community 00 Full-time

employees 00 Part-time

employees

## 4. Audit and control

The Finance Committee

The Finance Committee meets ...

The members of the Finance Committee are : Abbot, Prior, Chaplain, Brother Xx, Fr. xx

Other financial commissions...

*The Economic Council or the Pastoral Council approved by the conventual chapter defines the maximum amount that officials may spend, without additional authorisation:*

Abbot up to x.000 EUR,

Cillerero up to x.000 EUR,

Solemn professed up to xx.000 EUR

Conventual Chapter from xx.001 EUR. This was ratified on xx.xx.20xx.

Accounting system used... and by whom

Internal control

The external audit was carried out by... (name of the company).

## B. Legal status

All documents are complete (Incomplete). ... Legal status of



the organisation

Xx Abbey

Founding documents: Title/legal  
status

Registered as a non-profit charitable organisation,  
 Registration number: 000 issued on 00.00.20xx Documents  
 relating to tax exemption  
 of ... Ref. No. SM/00/00/00  
 Validation period from 00.00.20xx to 00.00.20xx

...

Legal status of the company or organisation

Social Institutions

Xx Abbey

All official business forms in the country where the monastery is located: No. Registration date

Legal contracts with the diocese and/or other religious congregations

Xx Abbey

Contract with the diocese ...

Land ownership documents (title deeds) Xx Abbey

1. Finca XX n.º 00, deed n.º 000/20xx,

Area: 0,00,00 Hectares,

Purchase price \$0.000

...

Water rights

...

Pension

Insurance...

Health insurance

...

Contracts with financial institutions

(including credit cards) and signature policies) Bank XX

Credit cards or loans .... Funds

management via ....

Testament of the monks

...

Employment contracts

...

Leases

...

Legal disputes No

litigation (Litigation: ...)

Weapons and licences (firearms licences)

### C. Finance

#### 1. Current financial situation

The exchange rate used in this report is 00.00. This is the average rate for 20xx according to ecb.eu.

The audit started in monastery xx on 00 April 20xx.

#### BALANCE SHEET FOR THE LAST TWO YEARS AND INCOME STATEMENT

| Assets                      | 20xx     | 20xx-1            |         |
|-----------------------------|----------|-------------------|---------|
| Fixed assets <sup>0</sup>   | .000 €0  | .000 €0.          | 000 €0. |
|                             | 000 €0.  | 000 €0.000 €0.000 |         |
| 0.000 €                     |          |                   |         |
| Cash and banks <sup>0</sup> | ,000 €0, | 000 €0            | ,000 €0 |
|                             | ,000 €0  | ,000 €0,000 €0    |         |
|                             | ,000 €0  | ,000              |         |
| Congregation funds €0       | .000     |                   |         |
| 0.000 €                     |          |                   |         |

|                                      |                              |            |                |
|--------------------------------------|------------------------------|------------|----------------|
| Purchases abroad0                    | .000 €0                      | .000 €0    | .000           |
| 0.000 €                              |                              |            |                |
| Credit entitlements0                 | .000 €0                      | .000 €0.   | 000 €0.        |
|                                      | 000 €0.                      | 000 €0.000 |                |
| 0.000 €                              |                              |            |                |
|                                      | 0.000 €0.000 €               |            |                |
| Liabilities                          | 20xx                         |            |                |
| 20xx+1                               |                              |            |                |
| Capital0                             | .000 €.                      |            |                |
| 0.000 €                              |                              |            |                |
| Donations from parent and sibling €0 | .000                         |            |                |
| 0.000 €                              |                              |            |                |
| Fund €0                              | ,000                         |            |                |
| 0.000 €                              |                              |            |                |
| Liabilities0                         | .000 €0                      | .000 €0.   | 000 €0.        |
|                                      | 000 €0.                      | 000 €0.000 |                |
| 0.000 €                              |                              |            |                |
|                                      | 0.000 €0.000 €               |            |                |
| Profit/Loss                          | 20xx                         |            |                |
| 20xx-1                               |                              |            |                |
| Monastery income                     |                              |            |                |
| Interest 0                           | .000 €0                      | .000 €0    | .000 €0        |
|                                      | .000 €0                      | .000 €0    | .000 €0.       |
|                                      | 000 €0                       | .000       |                |
| Pension €0                           | .000                         |            |                |
| 0.000 €                              |                              |            |                |
| General donations €0                 | ,000 €0                      | ,000 €0    | ,000 €0,000 €0 |
|                                      | ,000 €0                      | ,000 €0    | ,000           |
|                                      | 0.000 €0.000 €               |            |                |
| Monastery expenses                   |                              |            |                |
| Abbey Economy €0                     | ,000                         |            |                |
| 0.000 €                              |                              |            |                |
| Personal expenses 0                  | .000 €0                      | .000 €0    | .000 €0.       |
|                                      | 000 €0.                      | 000 €0.000 |                |
| 0.000 €                              |                              |            |                |
| Other expenditure0                   | .000 €0                      | .000 €0.   | 000 €0.        |
|                                      | 000 €0.                      | 000 €0.000 |                |
| 0.000 €                              |                              |            |                |
| Administration costs0                | .000 €0                      | .000 €0.   | 000 €0.        |
|                                      | 000 €0.                      | 000 €0.000 |                |
| 0.000 €                              |                              |            |                |
|                                      | 0.000 €0.000 €               |            |                |
| Total profit/loss €0                 | ,000 €0                      | ,000 €0    | ,000 €0        |
|                                      | ,000 €0,000 €0,000 €0,000 €0 | ,000       |                |
| Monastery activities                 |                              |            |                |
| Agriculture0                         | .000 €0.000 €0               | .000 €0    | .000 €0.       |
|                                      | 000 €0.                      | 000        |                |
| Butcher0                             | .000 €0                      | .000       |                |
| 0.000 €                              |                              |            |                |
| Other workshops0                     | .000 €0                      | .000 €0.   | 000 €0.        |
|                                      | 000 €0.                      | 000 €0.000 |                |
| 0.000 €                              |                              |            |                |
| Public services0                     | .000 €0                      | .000 €0.   | 000 €0.        |
|                                      | 000 €0.                      | 000 €0.000 |                |

0.000 €

Losses Monastery activities €0

,000 €0

,000 €0

,000 €0

,000 €0,000 €0,000 €0,000 €0 ,000

All figures relating to the monastery's activities are based on ...

2 Observations and analysis of Financial Visits Xx

Abbey

...

Xx Activities at the Abbey

- xx Workshop

...

D. Financial indicators

Expenditure

- Community expenses
- Expenditure on social activities
- expenditure on pastoral activities
- Necessary and future investments and risk management
- other

Recipe

s

- Income from own activities
- income from donations and pensions
- income from investments (rents, investments) Assessment

criteria

- The expenses of the community were to be covered by the work of the monks.
- Percentage of grants or investment income in the overall budget
- Standard of living in relation to the environment, e.g. gross expenditure per monk compared to a teacher's salary, or rather to the legal minimum wage of the country.
- Long-term investment appraisal (at the time of the Visit)
- The financial reserves should cover the monastery's expenses for one year.
- Sustainability of income and expenditure
- Assessment of continuing loss activities

E. Report on loans and debts Xx

Abbey

Loans: 00.000 EUR

Bad debts : ...

F. Future financial policies

Annual budget

...

Five-year financial plan

...

Investment Master Plan

...

Title deed (monastery Xx)

All land on which the monasteries are built Annual monastery expenses

Xx Abbey 0,000 EUR 0,000 EUR

Losses in all workshops and agriculture (activities)

Xx Abbey 0,000 EUR 0,000 EUR

Annual expenditure of social institutions

Xx Abbey 0,000 EUR 0,000 EUR

Financial commitments EUR 0,000 0,000 EUR

0.000 EURO 0.000 EUR

We recommend the following amounts for Stable Assets: ...

H. \_

Recommendations

Xx Abbey

...

Xx Monastery

...

I. Concluding remarks

We would like to thank the Abbot ...

J. Signatures

Xx Abbey, Location 00 April 20xx

## THE RENEWAL OF THE STRUCTURES AND FUNCTIONING OF THE ORDER'S FINANCIAL INSTITUTIONS

At the 2022 General Chapter, the Assembly voted as follows:

**Vote 76:** We ask the Abbot General and his Council, together with experts, to renew the structure and functioning of the Order's financial entities (Aid Commission, Finance Commission and the Generalate), in consultation with the members of these entities.

PLACET 142

NON PLACET 7

ABSTAIN 2

The context of this vote was:

1. the examination of the report of Dom Emmanuel and Dom Marco Antonio in response to the request of the Central Commission of Cîteaux 2019 (vote 57) to investigate, with the help of experts, the functioning of the Finance Commission of the Order and of the Aid Commission. This report (*REPORT ON THE MANAGEMENT OF THE FINANCE COMMITTEE AND THE AID COMMITTEE*) is the result of a report by the Central Commission of Cîteaux 2019. *AID AND FINANCE COMMISSION*) was studied by two Commissions (5+8) of the General Chapter 2022. The lack of time and the complexity of the matter were the reasons why the two Commissions did not come to a clear statement.
2. The study of the finances of the Order by an ad hoc Commission of three Superiors (Dom Gerard of Genesee, M. Pascale of Arnhem and Dom Malachy of Roscrea) and their report to the General Assembly. In their report, they concluded: "*Unfortunately, it has not been possible for us to carry out an effective evaluation and control of these accounts*".

All the comments made by the Commissions under points 1 and 2 can be summarised as follows in the recommendations of the ad hoc Commission which studied the finances of the Order:

- Establish a full review of the Order's accounts by a professional.
- Reflect on the structure and organisation of the different entities of the Order.
- Standardise the different accounts in order to be able to consolidate them.
- Apply international and church standards.
- Specify and formalise the responsibilities of each entity and of each person involved in them.
- Establish clear operational processes within and between entities.
- Have the accounts audited annually by an external professional body.

This document is mainly a reflection on the structure and organisation of the various entities of the Order that deal with finances, namely the Generalate, the Finance Commission of the Order and the Aid Commission. The first part looks at the past, the second at the present and the third at the future.

### I.A. STRUCTURE AND ORGANISATION OF THE VARIOUS ENTITIES TO DATE

In order to understand the current structure and organisation of the various entities of the Order dealing with financial management, it is worth citing the Statute for the Temporary Administration, no. 33, approved by the General Chapter of 1999:

## STATUTE OF THE TEMPORARY ADMINISTRATION V - THE ORDER

33. *The Order is a juridical person capable of acquiring, possessing, administering and disposing of temporal goods (CIC 634 ' 1; 1255; C. 42). In the area of temporal administration, the Abbot General is responsible for the ordinary administration of the Order and of the Generalate (ST 82. 2. A and C), and the General Chapter for its extraordinary administration.*

*a. The General Chapter has the power to determine the acts of extraordinary administration in the Order.*

*b. The Abbot General appoints a member of the Order responsible for the ordinary administration of the Order. He also appoints a Finance Commission for the administration of the Order's capital, which submits annual reports to the General Chapter.*

*c. The day-to-day administration of the Generalate and the keeping of the accounts of the \*General expenses+ of the Order are entrusted to the Bursar of the Generalate, who presents annual reports to the General Chapter. The administration of the Generalate follows the rules established for the other houses of the Order. The Abbot General determines with his permanent Council the contribution of each monastery to the expenses of the Generalate, taking into account the resources of each monastery (ST 84. 1. G).*

*d. According to the prescriptions of the Charter of Charity (7,4), when certain houses of the Order are in need, the communities which have more resources "moved by an ardent charity, will hasten, each according to its means, to help these houses with the resources that God has given them". A Commission studies the requests for help. These requests must be accompanied by a dossier presenting the plan for the use of the funds and indicating the help already requested and/or received from any organisation or community. The Commission also manages a mutual aid fund financed by an annual contribution from each monastery. It responds to requests as far as it is able or directs them to communities and organisations which may be able to provide assistance. (vow 86, GC 2002).*

It follows from this Statute that the Abbot General is responsible for the ordinary administration of the Order and of the Generalate. The General Chapter is responsible for the extraordinary administration. It determines what is to be considered as such.

In his responsibility, the Abbot General is assisted by a monk of the Order appointed by him, who is responsible for the ordinary temporal administration.

The Abbot General also appoints a Finance Commission to manage the capital of the Order. This Commission reports annually to the General Chapter.

The Bursar of the Generalate is responsible for the ordinary management of the Generalate and the general expenses of the Order. He reports annually to the General Chapter.

The administration of the Generalate follows the rules established for the other houses of the Order.

Finally, there is an Aid Commission which has a threefold role: 1) to examine applications for aid and 2) to administer a mutual aid fund. This fund is financed by a free annual contribution from each community. 3) to respond if possible or to refer requests for aid.

Over the years, the General Chapter has taken decisions that are not reflected in this Statute. It is therefore important to know the history and evolution of these entities.



## **A. THE GENERALATE**

For the last 23 years, M. Daniele has functioned as the person who managed the accounts of the Generalate and the ordinary expenses of the Order. The Bursar of the Generalate had no role. The administration was done in his own way and an annual report was given to the General Chapter (Abbot General). There are no known Statutes or operating procedures.

## **B. FINANCE COMMITTEE**

After the sale of Monte Cistello (1982) and the purchase of Viale Africa (1982), a capital had been created which (only) the Abbot General could use to grant loans to monasteries in need. In 1992, Dom Bernardo Olivera drew the attention of the Central Commission to this matter (Gethsemani 1992). It was unanimously decided that the Abbot General would appoint a Commission of two competent members and a permanent councillor who, under his responsibility, would a) manage the capital and b) be responsible for granting loans to the communities of the Order who requested them.

This decision was taken by the Central Commission which, however, did not consider it necessary to have it ratified by the General Chapter. The creation of the Financial Committee was published in *Information Bulletin* No. 96 of 9 September 1992. The capital of the Order was located in the Netherlands from 1992, first in Tegelen and then in Tilburg. The Committee met annually between 1993 and 1999.

After the General Chapter of 1999, this Finance Commission was renamed the Finance Commission of the Order, and was canonically established by the fact that both General Chapters of Abbots and Abbesses adopted the Statute for the Temporary Administration (Lourdes 1999, vote 124). The Commission continued to be composed of three members. Between 2000 and 2009, the number of members fluctuated between 3 and 5, but each time elected by the General Chapter. It met annually.

Its work continued to consist of (a) managing the Order's capital and (b) granting loans to the Order's communities.

In 2009, the Finance Commission of the Order drew up the following Statute in French only, without official translation:

### ***STATUT de la COMMISSION des FINANCES de l'<sup>ORDRES</sup>***

#### ***1. - Origine.***

*The Finance Commission of the Order has been canonically established by the acceptance by the General Chapters of the 1999 General Chapters of the mounts and monials of the Statute of the Temporary Administration (désigné ci-après par : ST.AT). (Lourdes 99. vote 124)*

#### ***2. - Obj.***

---

<sup>5</sup> Only the French text is available.

*In order to assist the Abbé Général, who is in charge of the ordinary administration of the Order (ST. 82.2.C.), the Commission, convened by the Administrator appointed by the Abbé Général according to the Statute of the Temporary Administration (ST.AT 33 b), is responsible for the management of the capital of the Order.*

### **3. - Membres.**

*The Commission is composed of 3 members (cf. vote 53 RGM 2008), appointed by the Abbé General (ST.AT 33 b) on the occasion of each ordinary General Chapter, and whose mandate is renewable.*

### **4. - Functioning and Meetings.**

*The Commission functions as the Council of the General Abbot for all that concerns the management of the capital of the Order. It also manages the funds received by the Aid Commission (cf. vote 53 RGM 2008). It meets at least once a year at the invitation of the Administrator, usually at the beginning of the year, to analyse the operations of the previous financial year and the capital situation of the Order at the end of that year.*

*Each year, the Finance Commission holds a joint meeting with the Aid Commission.*

### **5. - Modalités d'attribution des Prêts.**

*Each year, the Finance Commission indicates to the Aid Commission the amount it can draw on for loans.*

*Afin de ne pas réduire le capital, lors du dernier remboursement, un intérêt sur les prêts sera demandé, correspondant à l'érosion monétaire.*

### **6. - Le Président.**

*The President of the Commission is normally the Administrator. He convenes and chairs meetings and ensures the Commission's contact with the Abbé General.*

### **7. - Le Trésorier.**

*The Treasurer will keep up to date the state of the Order's capital. He ensures contact with banking bodies. At the annual meeting, he explains the movements of funds.*

#### **8. - Le Secrétaire.**

*The Secretary will keep in his archives all the documents relating to the loans granted to the Aid Commission. Normally, it is he who keeps the minutes of the meetings that he sends to the Abbé General, the Administrator, the Treasurer and the Secretary of the Aid Commission.*

#### **9. - Relations with other bodies of the Order.**

*General chapters. The Commission provides a report on its annual activities for each ordinary general chapter.*

*Maison Généralice. Dans le cas exceptionnel où la contribution annuelle des monastères s'avèrerait insuffisante pour couvrir les dépenses ordinaires de la Maison Généralice, l'Econome de la Maison Généralice pourrait faire appel à la Commission*

*The extra-ordinary expenses of the General Service, presented by the Treasury to the Commission, are financed by the Order's capital.*

*The General Accounting Officer of the General House presents the accounts for the previous year.*

*Rome, le 20 Janvier 2009*

Since 2009, they meet annually under the chairmanship of the Abbot General and also consult the Aid Commission and the Bursar of the Generalate. Investments are made in accordance with a Treasury Statute (investment policy) and the accounts are audited annually by an external auditor.

#### **C. THE AID COMMISSION**

At the 2002 General Chapter in Rome, the creation of a solidarity fund was proposed, the income from which could be used to help monasteries in need. Opinions were sharply divided. Some were in favour, others saw the difficulty of creating and managing such a fund. It would be a small and unprofitable fund, especially given the difficult economic climate. The vast majority agreed that there should be a committee to study, evaluate and follow up requests for help (Vote 23: 136/25/4).

This decision created a Mutual Aid Commission, whose three members (vote 27) were appointed by the Abbot General and his Council (vote 26). In the end it was decided not to create a fund but "une caisse d'entraide" and not a fund in the strict sense of the word. Each community was left free to donate an annual sum for this purpose (vote 29: 84/76/4). This aid fund would be managed by the Commission itself (vote 28: 117/42/6).

The same General Chapter added par. 33d to the Statute of the Temporary Administration.

*d. According to the prescriptions of the Charter of Charity (7,4), when certain houses of the Order are in need, the communities which have more resources "moved by an ardent charity, will hasten, each according to its means, to help these houses with the resources that God has given them". A Commission studies the requests for help. These requests must be accompanied by a dossier presenting the plan for the use of the funds and indicating the help already requested and/or received from any organisation or community. The Commission also manages a mutual aid fund financed by an annual contribution from each monastery. It responds to requests as far as it is able or directs them to communities and organisations which may be able to provide assistance. (vow 86, GC 2002).*

Thus, the Aid Commission had two objectives: a) to analyse the applications and b) to manage the mutual aid fund.

The first Aid Commission drew up a Statute in 2002, which was communicated to all the houses of the Order.

At the General Chapter of 2008, it was decided that the Commission would no longer be appointed by the Abbot General and his Council, but by the General Chapter. It was voted that the management of the Order's capital and the money entrusted to the Mutual Aid Commission would henceforth be the responsibility of the Order's Finance Commission. A notable change from the 2002 General Chapter.

During the 2014 and 2017 General Chapter, the financial needs of the houses were discussed following a survey and a working paper. Again the idea of a fund came up, but nothing was decided.

## **II. THE CURRENT SITUATION**

### **THE PROBLEMS BETWEEN THE FINANCIAL COMMISSION AND THE AID COMMISSION**

Since the beginning of the Aid Commission (2002), there have been discussions about the possibility of having a mutual aid fund or simply a Mutual Aid Commission that would immediately spend the money collected. At the same time, people still considered the Order's capital managed by the Order's Finance Commission as a kind of fund from which people could get interest-free loans. Over the years, this became less and less used.

The 2008 General Chapter added to the ambiguity by stating that the money received from the Aid Commission, separate from the Order's capital, would be managed by the Order's Finance Commission. These were larger sums of money.

Around 2017, this was supplemented by a very significant amount given by the Miraflores community to the Aid Commission. This money was included, separately, in the capital of the

Order. Since the Order's capital has a long-term investment status, this money from the Aid Commission could not be made available immediately. Therefore, the Aid Commission preferred a short-term investment. The mistrust between the two Commissions led to a growing conflict and the Aid Commission wanted to underline its independence from the Finance Commission of the Order. Dom Eamon, however, stuck to the 2008 decisions.

This discussion, conducted mainly by the members of the two Commissions and the Abbot General, finally led to the request by the 2019 Central Commission for an enquiry by external experts. Due to covid-19 and the state of Dom Eamon's health, this enquiry was never launched. It was resumed in 2022 and the experts delivered their findings to Dom Emmanuel and Dom Marco Antonio, who included them in their report to the 2022 General Chapter.

### **III. TOWARDS A SOLUTION FOR THE FUTURE**

The 2022 General Chapter expressed a clear desire for renewal and restructuring of the Order's financial entities. This means that things can and do change. It is not about keeping things as they were. It is about being able to manage the financial entities in the most transparent and efficient way possible, in accordance with the laws of the Church and of local governments.

All the present structures and their mode of functioning will be abolished. According to the Constitutions, it is the Abbot General who is responsible for the ordinary management of the Order and the Generalate. He appoints, according to the present Constitutions, the members of the Finance Commission who assist him in this task. **In the new structure, there will be a Finance Commission composed of three Sub-Commissions: Investments, Generalate/Order and Mutual Solidarity.**

#### **Mandate**

**The Finance Commission** shall meet at least once a year under the chairmanship of the Abbot General and its mission is to assist the Abbot General in the management of the ordinary administration of the Order.

The Finance Commission shall be composed of the Abbot General, the Bursar of the Order, the members of the three Sub-Commissions: Investments, Generalate/Order and Mutual Solidarity.

Both the Finance Commission and the Sub-Commissions will draw up new internal Statutes defining their own working methods, as well as the relations between them. These Statutes will be approved by the Abbot General and his Council (subsequently by the General Chapter).

The Abbot General shall also appoint a monk or nun as **Bursar (General) of the Order**. He or she will be the liaison between the Abbot General and the various Sub-Commissions. Preferably, he shall be a Councillor of the Abbot General, but the Bursar of the Order may also be another monk or nun of the Order, preferably not a Superior, and need not necessarily live in the Generalate. With the consent of the General Chapter, the Abbot General may also appoint a lay person as Bursar of the Order. The Bursar of the Order attends the meetings of the Sub-Commissions and has the right to vote in the Sub-Commission, except in the Sub-Commission on Mutual Solidarity.

**The Investment Sub-Committee** is responsible for managing the Order's capital. The Order's Bursar liaises with the banks on investment matters.

The Sub-Commission on Investments shall include the Bursar of the Order and two members elected by the General Chapter for a maximum period of six years. The Abbot General may

always attend the meetings of this Sub-Commission.

**The Generalate/Order Sub-Commission** is responsible for managing the ordinary expenses of the Order and those of the Generalate.

The Generalate/Order Sub-Commission shall include the Bursar of the Order, the Bursar of the Generalate and the Superior of the Generalate. The Abbot General may always attend the meetings of this Sub-Commission.

**The Sub-Commission for Mutual Solidarity** is responsible for studying, evaluating and processing requests for assistance from the houses of the Order. It entrusts only the Bursar of the Order with the transfer of funds and the management of its account.

The Sub-Commission for Mutual Solidarity shall be composed of the Bursar of the Order and three members elected by the General Chapter for a maximum period of six years. The Abbot General may always attend the meetings of this Sub-Commission.

The Sub-Commissions are obliged to prepare annual financial statements and submit them to the Bursar of the Order, who will compile them into a single financial statement. These financial statements must be audited annually by an external auditor.

The Bursar of the Order will submit an annual report of the work of all the Sub-Commissions to all the Superiors of the Order and during the General Chapter an exhaustive report which will be studied by an ad hoc Commission of the General Chapter after which the General Chapter will give its vote of approval.

This restructuring will require an amendment of the Constitutions and the Temporary Administration Regulations.

## **SOME DETAILS FOR THE SUB-COMMISSIONS**

### **a. Investment Sub-Committee**

Historically, the capital of the Order has been housed in one of the Dutch houses (Tegelen/Tilburg). It has usually been managed by the Superior of the house in question, as treasurer (appointed by the Abbot General). The question is whether this is desirable given the potential for conflict of interest. In the current situation, the Abbot General is a professed member of the house that manages the capital of the Order. This, according to experts, makes both the Superior of the house and the Abbot General vulnerable. (Although in the past this has never caused any problems).

The capital of the Order will therefore be assigned to the Generalate, and the management of the capital will be the responsibility of the Bursar of the Order.

### **b. Sub-Commission Order - Generalate**

-The juridical status of the Order in Italy must be resolved through the channels of the USG (Union of Superiors General).

-The Generalate will be financed by the annual contributions of the houses. For major expenses, the Generalate can draw on the capital of the Order through the Finance Commission.

-It is important that the ordinary expenses of the Order and the Generalate are clearly accounted for.

-Casa Generalicia cannot manage accounts of private households in any financial institution.

-For the extraordinary expenses for the upkeep of the Generalate, the Bursar of the Generalate will Order, with the approval of the Abbot General, requests permission from the Finance Commission.

### **c. Subcommittee on Mutual Solidarity**

-Loan applications are discussed and decided only by the full Finance Committee.

-From the beginning, in 2002, the idea of creating a fund, the income from which would benefit communities in financial need, came up again and again. Although the General Chapter took a different decision, the idea of this fund seemed to remain not only in the background, but also in unclear formulations in votes and texts. For many, it was never really clear.

From 2002 to 2008, the idea of a fund was also ill-timed due to the global financial crisis. In fact, the fund would be too small to raise enough money. After 2008, not only the financial market changed, but the Order was increasingly confronted with the suppression of the houses. Especially the latter made the idea of a fund more interesting again. In the coming years several houses will be closed. The General Chapter of 2022 clearly included in the new Statute on the accompaniment of fragile communities and on the suppression of a monastery that a part should go to the Order to meet the financial needs of the others. This is a situation which was not foreseen in 2002.

25. The financial assets of the suppressed monastery, respecting the civil law of the place and the will of the founders and donors, follow the surviving members of the community and go, in proportion, to the monasteries that receive them. If these goods are important, a part of them is set aside to help other monasteries of the Order, and to respond to the needs of the locality where the monastery is located. The management of this distribution of goods and of other elements of the monastery's patrimony (e.g. archives, library) is entrusted to the Closure Commission which oversees the suppression. It may be assisted, if necessary, by competent persons who need not be members of the Order. If the community has debts, the same Commission will pay them out of the financial assets of the community before dividing them, and drawing, if necessary, on other communities or on the organs of the Order, such as the Aid Commission or the Finance Commission of the Order.

The experts (Dom Emmanuel/Dom Marco Antonio report) therefore suggest that all the annual contributions of the houses to help others (the free contributions to the Aid Commission) should always be added to the capital of the Order. From this capital, an annually fixed percentage would be allocated to the Sub-Commission for Mutual Solidarity, which could distribute it. The Aid Commission thus regains its original purposes of a) analysing the request for aid and b) disbursing the amount pledged. Thus, the Aid Commission will not manage any money itself. The Aid Commission reports annually to the General Chapter/Abbot General. The Finance Commission of the Order manages the capital of the Order, which is supplemented from time to time by contributions from the communities for communities in need, according to its Statute.

According to the last report of M. Geneviève-Marie at the General Chapter 2022 the average donation of houses to the Aid Commission was in the last 20 years 22% of the houses. (At present we have 153 communities. This means that 34 houses can give money. In the last 20 years there was an average annual contribution of 133,000 euros + 34,000 dollars.



From 2014 to 2022 they received on a regular + exceptional basis 14,663,969.17 euros (thanks to the great donation from Miraflores). They have donated almost the entire amount received.

Thus, without the exceptional donations, the Aid Commission's budget is in the region of 150,000 euros per year.

At the moment, the Order's capital is around 7,000,000 Euros. If we agree on an annual rate of 3%, the normal budget of the Aid Commission will be 210,000 Euros, which is more than the average annual contribution.

In the near future it is foreseen that due to the abolition of houses larger sums will be given to the Aid Commission. We therefore make the proposal that all amounts above 25,000 euros should go immediately to the Order's capital.

This proposal will enter into force as soon as the members of the former Commissions have been informed and after final approval by the Council of the Abbot General. It will be in force *ad experimentum* until the General Chapter of 2028. At that meeting, the General Chapter will have to take the final decision.

H. Bernardus

Rome, 16 November 2022 (first draft); 25 March 2023 (second draft); 1 April 2023 (third draft); 30 December 2023 (final text).

**PROTOCOL FOR THE PREVENTION AND RESPONSE TO CHILD ABUSE AND ABUSE OF VULNERABLE ADULTS**

**INDEX**

**I. General considerations**

**II. Objectives of this Protocol III**

**Legislative framework**

- 1. International framework**
- 2. The Spanish Constitution**
- 3. The legislation of the Catholic Church**
- 5. Spanish Episcopal Conference and the diocese to which the monastery**

**belongs IV Definition of terms**

- 1. Sexual abuse of children and vulnerable adults**
- 2. Other types of abuse of vulnerable adults**
- 3. Offender and victim**

**V. Prevention of Abuse**

- 1. Training**
- 2. Employees and collaborators of the monastery**
- 3. Configuration of spaces**

**VI. Protocol for action**

- 1. Pastoral Commission**
- 2. Team of advisors**
- 3. Receipt of and response to an allegation or complaint**
  - 3.1. Receipt of the accusation or complaint**
  - 3.2. Response to the accusation or complaint**
    - a) General considerations**
    - b) Actions**
      - 1. In case of private complaint**
      - 2. In case of a formal complaint**
      - 3. In case of knowledge of a confidence**
- 4. Appeal**
- 5. Reparation, assistance and restorative**

**justice VII Annex**

## **I. General considerations**

1. The monastery N. is a community of celibate monks in the Catholic Church. The vocation of the monk is to live a life of prayer and work in fraternity according to the Gospel. Sexual abuse of minors and vulnerable adults, whether sexual, psychological, of conscience or of power, will not be tolerated.
2. The monastery N. has drawn up this Protocol out of recognition of its moral and legal responsibility, out of concern for the truth, for the safety and well-being of victims, and to ensure a fair trial for a monk accused of sexual abuse of minors or vulnerable adults, and to advocate for fair and dignified treatment of the latter.

## **II. Objectives of this Protocol**

1.- The objective of this protocol is to offer a guide for prevention and action, which will help our community to prevent and know how to act in cases of sexual abuse of minors or vulnerable adults that may arise, with or without formal accusation, as well as other types of abuse, violence or mistreatment that may constitute a crime and be the object of denunciation according to civil and ecclesiastical law. Specifically, it is intended to:

- a) To deal appropriately with allegations of sexual abuse of children and vulnerable adults, and other possible allegations of abuse, by seeking a fair resolution, investigating each allegation, establishing a process of investigation and decision-making that takes into account the rights and interests of both victims and defendants.
- b) To give a close response to those who claim to have been sexually or otherwise criminally abused by a monk in our community.
- c) To promote the aims of the Church by being faithful to Church policy for dealing with the sexual abuse of minors and vulnerable adults, and by establishing this Protocol in accordance with the Order's legislation and Canon Law.
- d) Comply with Spanish law, reporting to the relevant criminal authorities, in the case of credible allegations, in accordance with applicable laws and cooperating with authorities conducting an investigation into an allegation of abuse.

2. The monastery must offer a warm and safe environment, where the conscience and rights of minors and vulnerable adults are respected, and help in the prevention, monitoring and reporting of possible criminal situations, maintaining the presumption of innocence of the accused, as well as confidentiality while the protocol is being processed and the facts are clarified.

## **III Legislative framework**

### **1. International framework**

- a) Convention on the Rights of the Child (United Nations General Assembly, 20 November 1989 - ratified by Spain on 6 December 1990): Art. 19.
- b) On 25 May 2000, the United Nations General Assembly adopted the Resolution "A World Fit for Children".
- c) In 2004, the UN adopted the Optional Protocol to the Convention on the Rights of the Child on the sale of children, child prostitution and child pornography.
- d) In 2008, it appointed a Special Representative of the Secretary-General on Violence against Children.

- e) At European level, on 20 October 2007, the Council of Europe declared the Lanzarote Convention for the Protection of Children against Sexual Exploitation and Sexual Abuse; Spain ratified it in 2010.
- f) Penal Code (Organic Law 1'/1995, of 23 November): Art 1-11 On guarantees, penalties and the application of the Penal Law typifies Crimes against the Sexual Freedom and Indemnity of Minors. This regulation has been modified in the area of sexual freedom in 2015 and 2021 (arts. 178-194, 443 and 450), making explicit, in this last article, the duty to prevent offences.

## 2. The Spanish Constitution

The Spanish Constitution mentions the rights of children, the handicapped and sick, and, to a lesser extent, the elderly. These are more specifically referred to in the **BOE: Ley 6/1999, de 7 de julio**, de Atención y Protección a las Personas Mayores. The main texts are as follows:

- a) "Children shall enjoy the protection provided for in international agreements that safeguard their rights" (**CST 39.4**).
- b) "The family, as a natural element and the foundation of society, is entitled to special protection by the State. Equally entitled to such protection shall be the mother, the child, the elderly and the infirm and helpless" (**CST 51**).
- c) "The public authorities shall pursue a policy of prevention, treatment, rehabilitation and integration of the physically, sensory and mentally handicapped, to whom they shall provide the specialised care they require" (**CST 49**).
- d) "The public authorities shall guarantee, by means of adequate and regularly updated pensions, the economic sufficiency of citizens in old age. Likewise, and independently of family obligations, they shall promote their welfare by means of a system of social services that shall attend to their specific problems of health, housing, culture and leisure" (**CST 50**).
- e) The **BOE: Law 6/1999** establishes measures on the prevention of situations of mistreatment and protection for those elderly people who are in a situation of helplessness, senility, illnesses or deficiencies of a physical or psychological nature that prevent people from governing themselves, and which make them worthy of special protection by the Public Administrations.
- f) **Organic Law on the Legal Protection of Minors** (as amended by Law 26/2015), art. 11.3.
- g) **Organic Law 8/2021** of 4 June 2021 on the Comprehensive Protection of Children and Adolescents against Violence (LOPIVI).
- h) Furthermore, **this same law** requires specialised, initial and continuous training for all professionals who have regular contact with minors, creating reference figures such as the welfare coordinator in schools and the protection delegate in sports, leisure and free time activities, and establishes the need to adopt behavioural guidelines, as well as action protocols to protect children from any type of violence,
- i) In the **Penal Code**, many precepts relating to this type of offences against sexual freedom were amended in 2015 and 2021, the most important of which are Articles 178 to 194, 443 and 450. They criminalise sexual abuse, sexual assault, sexual harassment, offences of exhibitionism and sexual provocation, and offences relating to prostitution and the sexual exploitation and corruption of minors. In addition, Article 450 regulates the duty to prevent offences.

### 3. The legislation of the Catholic Church

- a) *Motu proprio Sacramentorum sanctitatis tutela*, 2001 (John Paul II), modified with the new norms of 2010 (Benedict XVI).
- b) *Motu proprio* of 2019: *Vos estis lux mundi*, on the norms to be followed by the Catholic Church regarding sexual abuse by priests or members of institutes of consecrated life. The text obliges priests and religious to report cases of abuse and cover-ups to the bishop, creates a reporting system and explains how to resolve investigations. Priests and religious are obliged to report to superiors or the competent ecclesiastical authority any allegations of abuse or cover-up of abuse. Reportable offences extend beyond abuse of children and vulnerable adults to include any kind of sexual violence and harassment through abuse of authority.
- c) (Guidelines for the protection of minors and vulnerable persons of the Vicariate of Vatican City, 26 March 2019).
- d) *Vademecum* on proceedings in cases of abuse of minors (2020), by the Congregation for the Doctrine of the Faith, on the process to be followed in cases of abuse of minors committed by clerics, which aims to guide those who need to proceed to the discovery of the truth, from the initial complaint to the completion of the process.
- e) Book VI of the C.D.C., mainly Title VI on crimes against life, dignity and liberty of man, in particular canon 1398 on penalties relating to sexual abuse of minors and mentally handicapped persons.
- f) The "Norms on the Most Serious Offences Reserved to the Congregation for the Doctrine of the Faith", (2021), articles 6 to 8, on offences against the sixth commandment committed by a cleric with a minor under 18 years of age or "a person who habitually has an imperfect use of reason".

### 4. Spanish Episcopal Conference and diocese of the monastery

- a) Protocol of the Spanish Episcopal Conference of 2010, entitled: PROTOCOL OF ACTION ACCORDING TO STATE LEGISLATION.
- b) Framework Protocol for the prevention and action in cases of abuse of minors and legally comparable cases, November 2022, published by Edice together with the Instruction of the Spanish Episcopal Conference on sexual abuse, approved in April 2023.

## IV Definition of terms

### 1. Sexual abuse of children and vulnerable adults

Sexual abuse of minors is understood as the use of a minor to obtain sexual gratification, not only through threats or violence, but also through seduction, surprise, deception, blackmail or manipulation, with acts such as: harassment, intimidation with obscene gestures or communications, telephone calls or mobile phone messages, e-mails or letters with sexual content, exhibition of the body, touching, forcing the viewing of sexual material, express performance of the sexual act, and in more extreme cases, subjecting the minor to sexual exploitation and prostitution.

Sexual abuse of vulnerable adults is equated with sexual abuse of minors.

## **2. Other types of abuse of vulnerable adults**

Vulnerable adults are understood to be those who are in a helpless situation due to senility, illness or physical or mental deficiencies, which prevent them from governing themselves entirely or partially by themselves, and who may be subject to violence or mistreatment, through abuse of authority or through other channels, leading to criminal and reportable situations. Among them:

- a) Omission or inadequate provision of health and pharmaceutical care.
- b) Obstruction of access to medical consultations.
- c) Omission or inadequate provision of scientific treatment and care.
- d) Infringement of their right to be treated with dignity, through acts of violence or emotional and psychological abuse.
- e) Infringement of their right to privacy.
- f) Neglect. Failure to meet their basic needs.
- g) Obstruction of their right to receive visits.
- h) Provision of services in poor hygienic conditions.
- i) Forcing against their will to go to or stay in a residential centre.

## **3. Offender and victim**

- a) In the case of minors, the aggressor or perpetrator is an adult member of the community, and the victim is a minor under the age of 18, involved in a non-consensual sexual relationship. If the relationship is consensual and the minor is over 16 years of age, there is no civil offence, but there is a canonical offence. The victim's family is also an indirect victim, as it participates in the psychological and moral damage of the direct victim.
- b) In the case of vulnerable adults, the offender or perpetrator is also an adult member of the community or a hired caregiver, and the victim is an adult who suffers from a physical or psychological disability that prevents him/her from governing him/herself.

## **V. Prevention system**

Preventive measures act when abuse has not yet occurred. They aim to reduce risk factors.

### **1. Training**

- a) The main preventive measure is formation in monastic life and spirituality, as well as the fostering of an authentic spiritual and prayer life. When a monk ceases to truly seek God, he easily becomes a slave to his lower passions and can become capable of anything.
- b) Training programmes will include affective-sexual education and knowledge about sexual, power and conscientious abuse, both for minors and vulnerable adults.
- c) The aim is to raise awareness, help raise awareness, train and provide information on the reporting process, and to raise awareness of the rights of children and vulnerable adults under existing civil and church laws.

## **2. Employees and collaborators of the monastery**

- a) The selection of employees will be carried out according to strict criteria, examining professionalism and criminal records, interviewing the interested parties and carrying out the relevant tests. All must have a negative certificate from the sex offenders' or abusers' register.
- b) At the time of their recruitment, employees will be invited to sign the written document attached as an Annex, in which they expressly reject any type of sexual abuse and undertake to incorporate the preventions contained in this Protocol into their work.
- c) The human qualities of the monastery's collaborators, be they family members, volunteers or others, will also be checked and they will be made aware of the precautions contained in this Protocol.

## **3. Configuration of spaces**

- a) According to Benedictine tradition, our way of life is coenobitic, in an atmosphere of solitude and silence, with a private enclosure, or cloister, reserved for monks. It also has an inn that functions as a small hotel (and a hostel for pilgrims). In this sense:
  - a. Minors are not allowed in the enclosed areas or inside the monastery unless accompanied by an adult.
  - b. Minors will not be admitted to our guesthouse unless accompanied by adults.
- b) No applicants under 18 years of age will be received in our community.

## **VI. Protocol for action**

This protocol is specifically designed to provide an appropriate response in the event of any allegations of sexual abuse of children or vulnerable adults, or other allegations of violence against children or vulnerable adults.

### **1. Pastoral Commission**

- a. If the monastery receives notice of a private or public allegation of sexual abuse of a minor or vulnerable adult by a monk of the community, as well as a private or public allegation of other violence towards a vulnerable adult, whether or not belonging to the community, the pastoral council of the superior will first meet to discuss the matter and see if the actions of this Protocol should be implemented.
- b. The Immediate Past President is also informed.

### **2. Team of advisors**

- c. In the event of a public accusation, or a formal complaint to the civil authorities, against a monk of the community for abuse of minors or vulnerable adults, the superior,

after his council has met, he shall bring it to the attention of the bishop and seek the advice of the persons appointed in the diocese for such delicate matters.

- d. The superior will then set up a team of advisors, consisting of the superior himself, a member of his council and the bishopric's advisors.
- e. If, in addition, the monastery has a lawyer, the lawyer may be part of the team, if the superior deems it appropriate, and may participate in the meetings and activities of the team to deal with the case.
- f. Appropriate lawyers must be available to defend such cases, especially in the event of an arrest, during interrogations and throughout the investigation of the case.
- g. The main objective of this team will be to assess allegations of sexual or other abuse against a monk of the monastery, to see if they are credible and to suggest appropriate action. He will be responsible for carrying out all the details of the case.
- h. One member of this team will be designated as spokesperson or interlocutor with the media, the police and any other public authority.

### **3. Receipt of and response to an accusation or complaint**

#### **3.1. Receipt of the accusation or complaint**

Information about the existence of a crime can reach the superior through various channels:

- a) On a private complaint that has not yet been submitted to the police, or on hearsay.
- b) By a formal complaint to the police or the public prosecutor's office, the matter being already known to the public.
- c) By a confidence or a relationship of trust between the superior or another monk and the person concerned.

#### **3.2. Response to the accusation or complaint**

##### **a) General considerations**

1. Upon receipt of an allegation of sexual abuse of a minor, or other reportable abuse, the superior shall provide for the pastoral care of the victim, including the offer of counselling and other forms of assistance, as explained in section VI of this Protocol, and may himself, if appropriate, provide personal pastoral care.
2. On the other hand, the superior shall respect the principle of the presumption of innocence of the accused until the facts are proven.
3. The monastery will deal openly with the allegations, unless the victim requests confidentiality in writing, and the superior will respect the victim's wishes, to the extent that legal obligations permit. The superior's primary concern will be the welfare and rights of the victim, and the just resolution of the case.



4. Any public communication will be made by the spokesperson to the media. The monks of the monastery should not make any further comments to the media.
5. If it is necessary to issue a press release, the information shall be brief, avoiding legal debate, mentioning the facts without making any assessment, showing support, closeness and solidarity with the victim and referring to the right to the presumption of innocence and collaboration with the Administration of Justice.
6. In the event that a legal or financial settlement is reached with the victim, the monastery will not accept any confidential legal agreement with the victim.
7. This Protocol shall apply to any allegation of other sexual acts and, in general, to any allegation of misconduct or other criminal acts under civil or canon law, where the victim was a minor at the time of the alleged criminal conduct, or where the victim was a vulnerable adult.
8. In the event that the accusation of abuse is against the superior, it will be the Immediate Pastoral Council who, after convening the Pastoral Council and in agreement with it, will constitute the team of counsellors, as explained in n. VI.2 of this Protocol.
9. If the reported offence has occurred in the context of a training or other meeting in a monastery, and the reported monk does not belong to the monastery where the offence took place, it is the responsibility of the superior to whom the monk belongs to activate and carry out the proceedings of this Protocol.

#### **b) Actions**

1. **In the case of a private complaint**, which has not yet been submitted to the police, the following steps shall be taken:
  - a. The superior, and/or a member of the advisory team, shall interview the complainant, accompanied by a witness, to verify the credibility of the facts. A written report shall be drawn up to record the facts.
  - b. The Superior will report to the Immediate Pastoral Leader and to the Abbot General and his Council.
  - c. The report shall contain at least the following information:
    - i. Complete identification of the complainant and the alleged victim, including their addresses and personal contact details;
    - ii. the identity of the monk denounced;
    - iii. the chronological and detailed account of the facts and circumstances complained of;
    - iv. the indication of the means of proof, if any;
    - v. the indication that the complainant and alleged victim have been informed of the canonical procedure and of their rights, e.g. to be kept informed, to seek legal advice and psychological counselling, and to have recourse to the civil justice system for the criminal investigation of the alleged facts.

- d. The superior will also meet with the accused monk to inform him of the accusation and of the steps to be taken, guaranteeing him respect for his rights and the presumption of innocence; offering him pastoral help and forbidding him all contact with the accuser, the alleged victim and his family. A report will be drawn up to record what has been said.
- e. The accused may continue to live in community, under such conditions as the superior deems appropriate, and to participate fully in monastic life.
  - i. If the investigation by the counsellors concludes that there is prima facie evidence of a criminal offence, the superior will advise the complainant to file the complaint himself/herself with the police or the court, bearing in mind that, if the victim is of age, only the victim can file the complaint.
  - ii. In addition, the superior will ask the monk to take a psychological, or even psychiatric, test and provide the therapist with all information concerning the alleged abuse. If the monk refuses to take the test or to provide the superior with the result of the test, the superior will take this refusal into account when considering how to respond to the allegation.
  - iii. If the monk completes the treatment with a positive evaluation, the superior will consider giving the monk a permanent position in the monastery, with due guarantees.
  - iv. In addition, as a precautionary measure, the superior shall arrange for the monk to be removed from any unsupervised contact with potential victims, or with the public, to ensure that he cannot commit any future act of sexual abuse of a minor.
  - v. When from the facts reported and from the enquiries made there is reasonable doubt as to the veracity of the facts, the superior shall close the proceedings and shall inform the complainants to exercise, if they deem it appropriate, the legal actions they deem appropriate, assuming the responsibility that may be applicable.
- f. In the case of an accusation against the superior, the interview with the complainant will be conducted by another member of the team of assessors and the report drawn up will be sent to the Abbot General, with a copy to the Immediate Pastoral Leader, via the Prior of the monastery.
- g. In this case, the precautionary measures to be taken would be communicated to the superior by the immediate superior, following the guidelines established by this Protocol.

## **2. In the case of abuse reported directly to the police or in court:**

- a. The counselling team will contact the monastery's lawyer, if the lawyer is not a member of the team itself, and the necessary cooperation will be provided to the police or the administration of justice.
- b. If the monk has made a statement and acknowledged the facts, he shall be provided with appropriate accompaniment and warned of the civil and canonical consequences of his conduct.
- c. The team of advisors, together with the lawyer, will take care of the legal defence, and until the conviction, the presumption of innocence of the accused will be respected, taking care of his psychological and spiritual state.

**3. In the case of knowledge of the offence through a confidence of the perpetrator,** the following shall be taken into account:

- a. Generally speaking, the superior must report any crime of which he becomes aware, whether it is committed by a member of the community or by an outsider, and must inform the judicial authorities for the good of the victim and, indirectly, for the good of the Church and of society as a whole.
- b. However, there is no crime of concealment when the facts have been known in the exercise of the priestly ministry, nor is there an obligation to give information to judges or other authorities about persons or matters of which they have had knowledge by reason of their ministry.
- c. However, he is obliged to report *the forthcoming or actual* commission of an offence, even if he has become aware of it on the occasion of or in connection with the spiritual guidance or confidences of the person concerned.

#### **4. Appeal**

When the complaint is private and the assessment team determines that the allegation of sexual abuse is true, the precautionary measures contained in this Protocol will be applied, but at the same time the monk will be notified of his right of appeal to the Immediate Father, the Abbot General and the Holy See, as provided for by the Order's own law and canon law.

#### **5. Reparation, assistance and restorative justice**

The last phase of this whole process is reparation to the victim, and, where appropriate, restorative justice.

- a) Reparation to the victim, in agreement with the victim, may take the form of financial compensation or psychological care and recovery; but in any case, it will involve a request for forgiveness from the monastery and a commitment to take the necessary preventive measures to ensure that the events do not happen again.
- b) For victim assistance, the counselling team shall designate a person with experience in counselling and dealing with victims of sexual abuse. This person shall not necessarily be one of the members of the counselling team.
- c) His task will be to attend to the victim's need for integral reparation, based on restorative justice, listening respectfully and closely to the victim and her family, offering them legal, psychological and spiritual help and resources; but he will not offer himself as a lawyer, therapist or spiritual director.
- d) It will seek to repair relationships damaged by crime and sin, denouncing criminal behaviour as unacceptable and reaffirming the values of the Church.
- e) It will trigger the liability of all parties, especially the offender and the monastery in which the damage has occurred.

- f) Explain to the victim the community's response to the victim's complaint, offering to be present at the interviews that will take place between the victim, the victim's family and the monastery.
- g) Finally, it will coordinate all communications between the victim and/or the victim's family and the monastery, keeping all parties informed of the development of the case.

**VII Annex**

Document to be signed by the employees of the monastery

At \_\_\_\_\_, a \_\_\_\_ of 20 \_\_\_\_

Mr. \_\_\_\_\_ with DNI \_\_\_\_\_ who worked as an employee at the Monastery of \_\_\_\_\_ with DNI \_\_\_\_\_ and registered office at \_\_\_\_\_ by this declaration I hereby expressly undertake:

- To show my strongest repudiation and condemnation of all practices involving child abuse, and explicitly those involving physical, psychological and sexual abuse of minors and vulnerable adults.
- To know, respect and promote in my contractual relations with the Monastery of N. La Salle, and to do the same in my contractual relations with the Monastery of N. La Salle. policy on the prevention of child sexual abuse that he follows.
- To actively collaborate in the prevention of this type of behaviour within the scope of my work.

And for the record, I sign it in my own handwriting.

## VOTES

**VOTE 1:** We would like the opening and closing Eucharist of the GC to be broadcast online, if possible, so that only the communities can participate.

YES: 21NO : 0                      ABS: 0                      **UNANIMOUS**

**VOTE 2:** We would like to see the possibility of participation in the GC classroom via chat during the dialogues being considered.

SI: 17NO : 4                      ABS: 0                      **PROPOSAL ACCEPTED**

**VOTE 3:** We would like to limit the speaking time of the participants in the dialogues in the GC classroom.

SI: 19NO : 0                      ABS: 2                      **PROPOSAL ACCEPTED**

**VOTE 4:** We wish that the number of lectures given at the GC be limited as much as possible.

SI: 19NO : 0                      ABS: 2                      **PROPOSAL ACCEPTED**

**VOTE 5:** We would like to see the drafting of house reports asking questions that are geared towards expressing the reality of the community.

YES: 21NO : 0                      ABS: 0                      **UNANIMOUS**

**VOTE 6:** We would like the Commissions studying the reports of the houses to have the latest Letter of Visitation of these communities.

SI: 20NO : 1                      ABS: 0                      **PROPOSAL ACCEPTED**

**VOTE 7:** We would like to see Regional Reports made with guidelines that help to reflect the situation in the Region.

YES: 21NO : 0                      ABS: 0                      **UNANIMOUS**

**VOTE 8:** We want the Regional Report to be studied only in the assembly.

SI: 19NO : 0                      ABS: 2                      **PROPOSAL ACCEPTED**

**VOTE 9:** We wish that new participants in the GC and capitulants who so wish receive information about the rules of the GC prior to the GC.

SI: 19NO : 0                      ABS: 2                      **PROPOSAL ACCEPTED**

**VOTE 10:** We wish to implement the papal rescript on the possibility of a non-cleric being a major superior of an institute of pontifical right, published on 18 May 2022, with a view to having it included in our constitutions.

SI: 19NO : 2                      ABS: 0                      **PROPOSAL ACCEPTED**

**VOTE 11:** We wish that the wording of statute 39.1. for monks be brought into line with that of nuns.

SI: 20NO : 1                      ABS: 0                      **PROPOSAL ACCEPTED**

**VOTE 12:** We wish to bring the wording of statute 39.4.A for monks into line with that of nuns.

SI: 20NO : 1                      ABS: 0                      **PROPOSAL ACCEPTED**

**VOTE 13:** We wish that in C. 74.3 of the nuns, the obligation for the Immediate Father to preside at solemn profession be abolished and be put on a par with the constitutions of the monks.

YES: 21NO : 0                      ABS: 0                      **UNANIMITY**

**VOTE 14:** We wish that in C. 57 of the nuns, the mention of the Immediate Father in the certificate of profession be suppressed and be put on a par with the constitutions of the monks.

YES: 21NO : 0                      ABS: 0                      **UNANIMITY**

**VOTE 15:** We want the figure of Immediate Mothers to be included in our constitutions.

SI: 20NO : 1                      ABS: 0                      **PROPOSAL ACCEPTED**

**VOTE 16:** For the support of the MA, each resident sibling shall in it will pay €100 per month.

SI: 18NO : 0                      ABS: 3                      **PROPOSAL ACCEPTED**



**VOTE 17:** Each SR and CCSB community will contribute €200, €150 or €100 per month to support the MA, as agreed by each community.

SI: 19NO : 0                      ABS: 2                      **PROPOSAL ACCEPTED**

**VOTE 18:** After having studied the figure of affiliation in our Region, we wish that it be definitively maintained in our legislation for both monks and nuns.

SI: 19NO : 0                      ABS: 0                      **UNANIMITY**

**VOTE 19:** We would like the figure of affiliation to be presented in the GC on the basis of the document presented by Mr. Juan José Domingo in the EN.

SI: 19NO : 0                      ABS: 0                      **UNANIMITY**

**VOTE 20:** We instruct the Formation Secretariat to revise and implement the PREM regulations concerning prevention, action and sanctions regarding abuses, which can also be used in the Internovitiate.

SI: 19NO : 0                      ABS: 0                      **UNANIMITY**

**VOTE 21:** We entrust Fr. Francisco Rafael de Pascual with the task of preparing a press release stating that the EN has met to discuss various issues of the region and to prepare the next GC with a family photo.

SI: 18NO : 0                      ABS: 1                      **PROPOSAL ACCEPTED**