

MEETING OF THE US REGION

May 22-29, 2024



Villa Maria del Mar
Santa Cruz, CA

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U.S. REGIONAL MEETING PARTICIPANTS

Villa Maria del Mar

May 22-29, 2024

MONASTERY

Berryville
Crozet
Genesee
Gethsemani
Guadalupe
Holy Spirit
Mepkin
Mississippi
New Clairvaux
New Melleray
Redwoods
Santa Rita
Spencer
Wrentham

SUPERIOR

Fr Joseph Wittstock
M Kathy Ullrich
Fr Gerard D'Souza
Fr Elias Dietz
Fr Peter McCarthy
Fr Augustine Myslinski
Fr Joseph Tedesco
M Rebecca Stramoski
Fr Paul Mark Schwan
Fr Brendan Freeman
M Kathy De Vico
M Victoria Murray
Fr Vincent Rogers
M Sofia Millican

INVITED GUEST

M Eleanor Campion, Councilor of the Abbot General

SECRETARIES

Sr Anna O'Meara, Mississippi
Sr Rose Ouellette, Wrentham

President of the Region: Fr Gerard D'Souza

Assistant Moderators: M Kathy Ullrich, Fr Joseph Wittstock

Readers for the Minutes: Fr Gerard D'Souza, M Kathy De Vico

VOTES

There were 14 Superiors voting. Snowmass was not represented.

I. Part IV. Statute on the Accompaniment of Fragile Communities and on the Suppression of a Monastery

1. We ask that the Law Commission revise Part IV on ‘The Process of Suppression’ in the *Statute on the Accompaniment of Fragile Communities and on the Suppression of a Monastery*. This revision should address the following points:
 - A clearer distinction is needed between the words ‘closure’ and ‘suppression’: suppression has the connotation that a monastery no longer exists.
 - It needs to be made clear that the General Chapter’s vote to close a monastery is the beginning of a process that leads to the suppression of the monastery.
 - The consequences of the vote of the General Chapter to close a monastery need to be stated clearly. Is the conventual chapter suspended? What is the authority of the Commission of Closure at this point? What is the role of the Father Immediate?
 - Part IV of the Statute should place greater stress on the pastoral care of the members of the house being closed.
 - Who is responsible for the pastoral care of the monks/nuns during the process of closure?
 - When a member of a house being closed seeks stability in a new house, a sufficient time of presence in the receiving house may be required before the conventual chapter vote mentioned in paragraph IV.23 is taken.
 - In the case of the closure of a monastery of nuns, it should be stated whether the petition to suppress the monastery is made to the Holy See at the beginning or at the end of the process.
 - The wording of paragraph IV.27 should be corrected to: “When the process of closure is entirely concluded, **the Abbot General** issues a decree of suppression. The work of the Commission of Closure then ceases.”

YES 14

NO 0

ABSTAIN 0

II. Visitations/Mothers Immediate

2. We request that the General Chapter of 2025 vote on the ratification of ST.75. 2. A:
The delegated visitor can be the superior of an autonomous monastery of nuns or of monks. The delegated visitor can also be a former abbot (titular prior) or a former abbess (titular prioress) or a monk or a nun Councilor of the Abbot General. In these cases, both the Abbot General and the Father Immediate consult the abbot of the house to be visited, who in his turn consults his community. (cf. GC 2022/2, vote 23)

YES 14

NO 0

ABSTAIN 0

3. We encourage, *ad experimentum*, until the General Chapter of 2028, the delegation of the functions of Fathers Immediate of houses of both monks and nuns to abbesses following the usual consultations.

YES 14

NO 0

ABSTAIN 0

III. Affiliation

4. We wish to postpone efforts toward legislation on affiliation until we have more experience with real case. In the meantime, we entrust to the Abbot General and his Council the oversight of proposed affiliation between communities of the Order.

YES 14

NO 0

ABSTAIN 0

IV. Question #2 from Dom Bernardus on how the Order can function better on an intercontinental level

5. We propose a dialogue at the General Chapter in the Commissions or in specially formed intercultural groups on the question of how to foster fuller and more equal participation in the Order across cultural and geographical lines.

YES 14

NO 0

ABSTAIN 0

6. We propose some formative input at the chapter on intercultural understanding and communication.

YES 14

NO 0

ABSTAIN 0

V. Question #4 from Dom Bernardus on how better to involve the communities in the General Chapter

7. We encourage Superiors to share the working documents of the Order and to discuss in community these main topics. This input from the communities can then be shared at the regional level through the Superior.

YES 14

NO 0

ABSTAIN 0

VI. Autocritique of the 2022 General Chapter

8. When all 14 Commissions write reports as part of extraordinary procedure, we ask that a synthesis of the reports be presented in the aula instead of 14 individual reports.

YES 14 NO 0 ABSTAIN 0

9. We ask for greater clarity in the Procedure for Studying House Reports and on establishing an *ad hoc commission*: steps delineating how it is formed, including clarity on how it works, and how it reports to the Chapter.

YES 14 NO 0 ABSTAIN 0

VII. Proposal to give the General Chapter a more spiritual and life-giving content (Request #3 of Dom Bernardus)

10. Instead of trying to integrate spiritual and formative aspects into the normal work of the General Chapter, we wish to set aside two or three days with a modified schedule for conferences, reflection, dialogue or sharing, and orientation for new capitulants.

YES 13 NO 1 ABSTAIN 0

VIII. General Secretary for Formation (Request #5 of Dom Bernardus)

11. Instead of appointing a General Secretary for Formation, we propose electing an *ad hoc commission* for formation to identify the order's needs in the area of formation and to propose concrete initiatives. This Commission's mandate would end with a report to the General Chapter of 2028. On the basis of this Commission's work, we can decide how to proceed for the future.

YES 14 NO 0 ABSTAIN 0

IX. The Order's Publications

12. We recommend an update of the Order's Statute on Publications.

YES 14 NO 0 ABSTAIN 0

REGIONAL MATTERS

1. We invite the Abbot General to consider initiating discussion and collaboration among the various publication efforts involving the OCSO, in order to take stock of their present reality and to collaborate in planning their future. We ask the Regional President to write the Abbot General a letter to this effect.

YES 14

NO 0

ABSTAIN 0

2. We approve the modified Regional Statute incorporating changes in 3. D on invited guests, 4. D on the election of the editor of CSQ, 5. F on Region's schedule of pro-rating Regional expenses, along with the elimination of 4.H and the dissolution of the Regional health plan.

YES 14

NO 0

ABSTAIN 0

INTRODUCTION

With pleasant memories of the Regional Meeting of June 2022, the superiors of the US Region returned to Villa del Mar Retreat Center in Santa Cruz, California. The gracious welcome of our hostesses, the Sisters of the Holy Names of Jesus and Mary, combined with familiar surroundings to make us feel comfortably at home, as if there had not been a two year interval between visits.

We were honored to welcome M Eleanor Campion, Councilor of the Abbot General and member of the Law Commission. M Eleanor's expertise and experience proved an invaluable asset in our discussions and deliberations.

The main issues worked on during the meeting were related to assisting Fragile Communities. Three reports addressed this topic directly: *IV. The Statute on the Accompaniment of Fragile Communities and the Suppression of a Monastery, Mothers Immediate, and Affiliation*. The five timely and practical questions posed by our Abbot General to be considered at the Regional Meetings of the Order prompted probing discussions, resulting in several proposals that are represented in the votes. Our agenda was enriched by guest speaker, Paul Fahey, who visited us virtually. His informative presentation on *Spiritual Abuse and Abuse of Conscience* was well received.

The report that follows documents the discussions and decisions during the meeting but only partially conveys the warm, peaceful spirit of friendship, support and trust that permeated the deliberations and lightened the workload. The Votes in English, French, and Spanish have been sent by email to the Generalate and a copy of the full minutes in English will follow.

Elections

President of the Region: M Kathy Ullrich

Assistant Moderators: M Sofia Millican and Fr Joseph Wittstock

Next Regional Meeting: June 11-18, 2025 at Holy Spirit Abey, Conyers

PART IV. THE STATUTE ON THE ACCOMPANIMENT OF FRAGILE COMMUNITIES AND THE SUPPRESSION OF A MONASTERY

Section IV, on ‘The Process of Suppression’ of the *Statute on the Accompaniment of Fragile Communities and the Suppression of a Monastery* was the focus of the presentation by D. Vincent of Spencer and M. Kathy of Redwoods. D. Vincent gave a synthetic overview of his experience of the process to close Snowmass. M. Kathy reviewed some of the canonical issues that surfaced from the Commission of Closure’s work on Snowmass.

There was discussion on the meaning of the words ‘closure’ and ‘suppression’ and the Superiors of the Region felt a clearer distinction needs to be made in how these words are being used. Other points that were noted centered around the meaning of General Chapter’s vote to suppress a monastery. Where does the authority reside? If with the Commission of Closure what about the Father Immediate? If the conventual chapter of the monastery ceases with the vote of the General Chapter, this needs to be stated in the Statute.

Most of the discussion centered on the stability of monks or nuns once their monastery is closed. From the experience of Snowmass there were different issues that needed attention in accompanying the brothers: personal, emotional including grieving, and canonical. Another issue was related to the receiving community. How can the conventual chapter vote on a monk or nun when they do not know the person. The Region felt that some time was needed in the receiving community in order to take a meaningful vote.

MOTHERS IMMEDIATE

We were fortunate to have M. Eleanor at our Regional Meeting to present the working paper on Mothers Immediate as well as M. Rebecca, Mother Immediate of New Melleray, and D. Brendan, Superior *ad Nutum* of New Melleray, to speak from their own experience.

The working paper on Mothers Immediate is a response to Vote 22 of the 2022 General Chapter (Part Two) that requested the Law Commission to prepare a working paper on Mothers Immediate to be studied at the General Chapter of 2025. By the end of the Chapter, it was already happening.

The Law Commission has found no juridical reason why nuns cannot exercise the responsibility of Mothers Immediate of both communities of nuns and monks. There is nothing in the role of Father Immediate that pertains to priesthood and, therefore, would restrict the office to an ordained person. Currently there are nine Mothers Immediate serving thirteen communities, eight of which are communities of monks.

M. Eleanor pointed out that an Abbess serving as Mother Immediate under the present *ad experimentum* system, by personal appointment or delegation, would retain this responsibility if no longer in abbatial office. It follows that she would no longer be a member of the General Chapter. This potentially creates an awkward situation. Therefore, it might be good if the “paternity” be given to a community of nuns, so that the office of Mother Immediate would be

passed on to the next Abbess through abbatial election.

Terminology was another issue explored. The working paper states that the gender-based terminology is awkward and invites the Regions to suggest new possibilities (5.1). Some thought was given to moving away from the familiar concept and language, for example “Superior Immediate”. But no recommendations were made by the Region.

The US Region supports continuing Mothers Immediate *ad experimentum*. (See Vote 2.)

M. REBECCA OF MISSISSIPPI, MOTHER IMMEDIATE OF NEW MELLERAY

In February 2023 our Abbot General visited New Melleray and Mississippi Abbeys. During these visits he recommended the two abbeys collaborate in efforts to revitalize New Melleray. In August 2023 Dom Bernardus appointed M. Rebecca the Mother Immediate of New Melleray. M. Rebecca pointed out that since several sisters of the Mississippi community are involved in the renewal process, the appointment is more like a cross between Mother Immediate and Affiliation and is possible because of the geographical proximity of the two communities. Dom Bernardus has aptly called it an Association. The result has been a positive experience for both communities and in October an evaluation will be done with the Commission of the Future.

The Commission of the Future identified three areas for this unique initiative: Vocation promotion, a greater atmosphere of welcoming within the community, and leadership. Mississippi Abbey has set up a vocational recruitment program for New Melleray that has been successful in attracting candidates. This has been done by updating vocational brochures, sending flyers to Midwest parishes and universities, and developing a network of volunteer organizations to spread the word. Sr Kathleen O’Neill has been appointed Novice Director at New Melleray and is working with a vocation team at New Melleray. They presently have one observer and a novice re-entering in July. Secondly, the monks are being encouraged to develop a greater sense of hospitality within the community. An outside facilitator has been engaged to help improve communication skills. Thirdly, Fr. Brendan has requested a search for new leadership due to his age. He feels he no longer has the energy necessary for revitalization. The effort to find new leadership has been difficult since no monk in the Order has been located. We continue to consider alternative forms of leadership such as a monastic commissary.

AFFILIATION

Fr. Joseph of Mepkin introduced the topic of Affiliation by first commenting that Affiliation is a tool for supporting fragile communities. It differs from the appointment of a Monastic Commissary in that an entire community takes another community under its care until the affiliated community becomes viable or decides to close. In the exercise of this relationship the autonomy of the affiliated community is suspended, candidates are formed in the affiliating community or in another monastery established by the General Chapter, the local superior of the affiliated community is appointed by the major superior of the affiliating house, and the economies of the two houses are administered separately.

With the promulgation of *Cor Orans* (#s 54-63), affiliation is the universal law for nuns. What is needed is how to apply the law in our Order. The 2022 General Chapter approved its use for communities of monks until the next General Chapter. To date there are no actual cases of affiliation in the Order.

In response to the Chapter's request that Regions study the Commission reports on the topic and give feedback to the Law Commission, D. Joseph identified seven areas of concern frequently cited in the Commission report (Commission's report is on the Order's website; See Appendix II for D. Joseph's report).

In our discussion of these seven areas, the role of the Father Immediate of the affiliated house surfaced as an important matter needing the attention of the Law Commission. *Cor Orans* (#58) stipulates that the Major Superior of the affiliating house is the Major Superior of the affiliated house. What then is the role of the Father Immediate of the affiliated house? Formation was another matter evoking discussion. What is the role of the affiliated house in forming its own members? It seems more flexibility is desirable. Then there is the question whether a community of monks can be affiliated to a community of nuns? Such an affiliation would require permission of the Holy See since a non-ordained person cannot be Superior of a monastery of monks.

Since we have no actual cases of affiliation in the Order, we wish to postpone movement toward legislation until we do. (See Vote 4).

REGIONAL COOPERATION

AND

THE ABBOT GENERAL'S QUESTION #1: ATTENTION TO SMALLER COMMUNITIES IN THE REGION

As an Order we are in a time of fragility and weakness that is consistent with the challenges being experienced in the Universal Church. The lack of vocations and new leadership that plagues us is understandable in the context of what is happening in the Church. As we reflect on the history of the Order, we, likewise, are reminded that this is not the first time that we have faced the challenge of re-founding our charism. It is important to keep this in mind as we engage in the process. The recent circular letter of Dom Bernardus on Pentecost inspires hope and urges us to cooperate with the Holy Spirit at work in our fragility. In living the Paschal Mystery, there is always hope in the Resurrection.

D. Joseph Wittstock gave us a presentation in which he reviewed the many ways that our houses, as a Region, are already caring for one another, especially for the smaller communities that are most experiencing their fragility. (See Appendix IV.)

The Superiors of our Region support one another pastorally, certainly at Regional Meetings but also through meetings of geographical sub-groups: the Western Superiors and more recently, the Southeastern cluster. Technology makes it possible to extend this support beyond physical

gatherings, e.g., Zoom meetings. There is also mutual support in the sharing of resources among our monasteries. Some examples given are the sharing of personnel—chaplains, retreat directors, guest lecturers--, financial assistance, and serving on Commissions of the Future, of which there are three in our Region.

We also recognize possible ways to grow and develop the support already present in our Region. In situations where viability is precarious, we might experiment with Affiliation—or aspects of Affiliation--in efforts to strengthen a fragile community. Another possibility is the amalgamation of two houses. Since communities can feel very alone in their vulnerability and weakness, optimizing communication among our houses has the potential not only of sharing news of significant developments underway in our communities but also of enkindling hope and uniting houses in their struggles and loneliness. Our poverty unites us.

QUESTIONS TO THE REGIONS FROM THE ABBOT GENERAL

Question 1. *At present we are increasingly faced in the Order with smaller communities... The governability of these smaller communities is a concern. ...I would urge the Regional Meetings to pay special attention to these small communities within their Region and look for solutions together...*

See minutes for REGIONAL COOPERATION, above and Appendix IV.

Question 2. *An issue that deserves attention...is how the Order can function more and better on an intercontinental level. Outside Europe, the complaint is often heard that the Order remains too European-focused. The question is how should we understand this criticism? How can we take it seriously and produce solutions that can ensure full and equal participation of everyone in the Order? How do we, in the Order, shape synodality?*

Discussion surfaced an awareness that we are growing in appreciation for and understanding of both synodality and cultural diversity. We broke into two groups for discussion and these points were shared:

- +we could use education on multi-cultural issues and modes of communication.
- + recognize differences as complementarity.
- + for nominations to services of the Order, we desire diversity but also capability.
- + for Presidents of Commissions and the Coordinating Commission – encourage people to speak who have not spoken.

In the end we felt what is most needed is education in multi-cultural diversity and communication. (See Votes 5 and 6).

Question 3. *The dreams expressed by the superiors revealed a great desire among many to give the General Chapter a more spiritual and life-giving content in addition to the necessary juridical*

content. I cordially invite...the Regional Meetings to produce concrete proposals that we can discuss during the Central Commission...

In exploring ideas about enhancing the spiritual and life-giving aspects of the General Chapter, suggestions included giving more time and emphasis to inspirational talks. Another suggestion was to introduce the practice of pausing at intense moments for a few moments of quiet prayer. One person wondered if the pastoral dimension was being addressed, specifically the pastoral care of the Superior. In summary, the suggestion that gained the most interest was to set aside time—two or three days—for conferences, reflection, and sharing related to the spiritual dimension of the work of the General Chapter (See Vote 10).

Question 4. *...how can we better involve the communities in the General Chapter, so that it does not just remain a meeting of the Superiors, but that of the whole Order participates in the General Chapter in one way or another...*

It was agreed that it is the Superior's responsibility to involve his or her community both before and after the General Chapter. Suggestions of ways to do so included involving the community in the preparation of its house report, making the agenda and working papers available to the community, and engaging the community in discussion of the content. The Superior is thereby enriched and thus can bring the contributions of his or her community to Regional Meetings as well as to the General Chapter (See Vote 7). After returning home the Superior can share the work of the General Chapter through Chapter talks, and the house reports of all the houses of the Order can be made available to the community, perhaps Region by Region. This practice would also further unity within the Order at an intercontinental level (Question #2).

Question 5. *...I would particularly like to draw your attention to the vacancy for a new General Secretary for Formation. ...I will send a letter to the Regions as soon as possible with some proposals on the part of the Abbot General and his Council regarding this important service.*

Discussion of this matter began with the Abbot General's letter and his detailed job description for the General Secretary of Formation. We appreciate the Abbot General's initiatives in the area of formation and his honoring the dreams of the superiors regarding formation. Given the limited resources in most of our communities, the Superiors wonder whether we could find a monk or nun of the Order who could meet these requirements. Reference was made to the *Exordium* and *Experientia* programs as excellent and effective models for formation in our communities. In conclusion, the Superiors recommended that an *ad hoc* commission for formation be established to identify the Order's needs in formation and to propose concrete initiatives. Based on this commission's work, we can then decide how best to proceed in the future (See Vote 11).

REGIONAL MATTER

THE REGIONAL SECRETARY OF FORMATION

The primary responsibility of the Regional Secretary of Formation that our Region wants to maintain is the Junior Seminar. The present model in which the Regional Secretary is alone responsible for the Junior Seminar is not sustainable. We need a new model because we are unable to get a Regional Secretary who can organize the seminar and be absent from his or her monastery for two weeks every year. Discussion of the situation yielded the following:

- Establish an *ad hoc* committee, consisting of two superiors (or other monks/nuns) plus the Regional Secretary, responsible for choosing topics, locating presenters, and determining the rotation of host houses.
- The hosting house would take more responsibility to the extent that the Regional Secretary would not need to be present. The Junior Director or other formator would attend the seminar and be available for any needs that arise.
- The length of the seminar would be 12 days plus 2 travel days.

Presenters and host house are in place for 2025. Discussion will resume at the 2025 Regional Meeting.

CISTERCIAN PUBLICATIONS

Fr. Elias reported that Cistercian Publications is doing well, averaging eight books a year. Marsha Dutton continues as Executive Editor and there are no changes on the board this year. The treasurer, Fr. Gerard, reported that the Financial Year from July 1, 2022, to June 30, 2023, ended with a bank balance of \$142,844.23. Total income was \$51,484.60; total expenses, \$34,396.84. CP does not have a regular source of income. However, the US Region is committed to supporting CP and contributed \$33,243.50 for the Financial Year ending June 30, 2023; special mention was made of the \$ 5000 donation from Gethsemani. Liturgical Press had a good year in 2022-23 and thus our share of the profits generated was \$13,241.10. We have received dividends from Liturgical Press for two consecutive years now - a nice bonus. Fr Gerard intends to invoice the region for support late in 2024 or early in 2025.

CISTERCIAN STUDIES QUARTERLY

After six years of generous service, Fr. Lawrence Morey is stepping down as editor of CSQ. Fr. Mark Scott has agreed to replace him in the position. Fr. Jerome Macher, Administrator of CSQ, reported that over recent years, subscriptions to CSQ have been decreasing while production costs have been increasing – a trend that is common in our time. CSQ's average income over the past eight years of Fr. Jerome's tenure has been \$14,000. If the production costs hold CSQ will not be able to make it through the year without some assistance. Thus Fr. Jerome asked the region for a one-time contribution of \$20,000 to sustain the operation. The Superiors approved his request.

Fr. Elias announced that, having come from England, this is the 50th Anniversary of CSQ in the United States. This landmark occasioned the opportunity for Fr. Elias to address the importance of

keeping Cistercian publications alive and healthy for the sake of study and formation in the Order. Discussion among the Superiors resulted in recommending an updating of the Order's Statute on Publications (See Vote 12.) and inviting the Abbot General to consider initiating discussion and collaboration among various publication efforts involving the Order to assess their present reality and to collaborate in planning their future (See Regional Matters, Vote 1.)

MBA

D. Vincent presented us with the newly designed certification mark for Trappist and Trappistine products made in the USA. It can be used with either dark or light packaging materials because the mark allows the colors to be inverted (See below).

The final parameters have not yet been determined for which products will be permitted to use the mark. Certainly, any products made at our monasteries, including products that use materials obtained from outside the monastery and work performed by lay employees of the monastery, will be included. Our attorney has begun the process of registering our certification mark and there do not appear to be any obstacles to completing the registration process.



Note: it is the circle icon only – not the brown background

REGIONAL WEBSITE

Fr. Gerard presented an overview of the website's cost and asked whether we wanted to continue with it. The initial cost to set up the website was \$75,000 and continued maintenance over the years amounted to \$77,000. The annual expense is \$7,000 to \$8,000, plus Sue Schuttinger's annual salary of \$17,000. Sue selects content for the regional website from the postings on the websites of our various monasteries. While the regional website is intended to function primarily as a vocation portal, it is difficult to gauge its effectiveness in recruitment. However, it is a tool for Evangelization. The Superiors decided in favor of continuing as is.

REGIONAL HEALTH PLAN AND CATASTROPHE FUND

Currently the program is administered at Conyers. It was designed originally to assist a community in a situation of unusually high medical costs which it would find difficult to meet. The fact that there have been no claims in the past six years raises the question whether the program has outlived its need. The Superiors voted unanimously to disband it. Funds will be returned to the monasteries that are invested in the program.

AMENDED US REGIONAL STATUTE

See VOTES, REGIONAL MATTERS, Vote 2.

U.S. REGIONAL STATUTE

(Approved at Regional Meeting 2014 – modified and approved at 2017, 2019, 2024 Meetings)

01. US REGION is the official name. The Region is composed of both monks and nuns. (Constitution 81; Regional Meeting 1996)

02. Regional Meetings:

- A. At least one meeting is held during a General Chapter. Two Regional Meetings are held between General Chapters: the second one, immediately preceding the General Chapter, may be attended by delegates from the communities.
- B. The first meeting after a General Chapter prepares for the Central Commission
- C. There may be meetings for pastoral sharing.
- D. Parliamentary law is followed during the Regional Meeting.
- E. Superiors and delegates have a right to vote if the nature of the vote does not restrict this right to the Superiors.

03. President of the Region is elected by the superiors present at the first Regional Meeting after a General Chapter. The responsibilities are:

- A. Presiding at Regional Meetings.
- B. Coordinating and moderating Regional Meetings using the help of two assistant moderators if the Regional Meeting opts for these assistants.
- C. Preparing an agenda and circulating it with other necessary information to the superiors.
- D. Inviting observers and other persons who are asked to attend.
- F. Calling mini-meetings when these are required.
- G. Dividing the expenses of a Regional Meeting according to the percentage basis.

04. Regional Personnel:

- A. At the end of each Regional Meeting, two assistant moderators are elected for the following Regional Meeting. They form a coordinating committee with the President.
- B. One Regional Delegate for the General Chapter is elected at the Regional Meeting which occurs in the year of the General Chapter. Eligible for the Regional Delegate to the Chapter are those monk and nun delegates present at the Regional Meeting. Electors are the superiors and delegates present. All of these electors (monks and nuns) vote for a single delegate, a monk or a nun.
- C. The Regional Secretary of Formation is elected by superiors and delegates at the Regional Meeting which occurs in the year of the General Chapter. He or she chooses an assistant. The secretary's responsibilities are given in #71, Guidelines on Formation.

- D. When the US Region sponsors CSQ, the editor is elected by the US Regional Meeting, by superiors. The editor's term of office is six years. If a new editor must be named between meetings, the Regional President makes a temporary appointment until the next Regional Meeting. The US Regional Meeting will also elect three Directors whose task is to promote CSQ, to provide counsel to the editor, and to advise the region about its choice of editors. The financial and administrative matters of CSQ are overseen by the Board of Directors of Cistercian Studies Quarterly, Inc., a board that consists of a President (the editor), a Vice President, a Treasurer (i.e. the administrator of CSQ's current business, who may be an employee), and a Secretary (a monk or nun of the Region capable of monitoring the corporation and its finances). If the sponsorship of CSQ passes to another region, these provisions cease to apply.
- E. Cistercian Publications: Members of this Corporation are the superiors of each community. New superiors must be voted in at a Regional Meeting. Meetings of the Corporation are held during a Regional Meeting.
- F. A member for the Central Commissions and an alternate are elected at a Regional Meeting during the General Chapter.
- G. Monastic Business Association officials are elected at a Regional Meeting.

05. Regional Expenses, shared and pro-rated by the communities, are:

- A. The Regional Delegate to the General Chapter
- B. Secretaries for Regional Meetings.
- C. Abbot General if he attends a Regional Meeting and his secretary, but only room and board.
- D. English Speaking Member of the Permanent Council if she/he is present, but only room and board.
- E. Visitors are officially invited.
- F. The schedule for pro-rating is:
 - 9.4% Gethsemani, New Melleray, Spencer, Genesee
 - 7 % Conyers, Guadalupe, Wrentham, Berryville, Vina, Mepkin,
Mississippi
 - 4.5% Redwoods, Santa Rita, Crozet.
- G. The per diem amount for meetings at monasteries in our Region is \$60.00 (voted upon and approved at the 2019 Regional Meeting).

EVALUATION

- “Good to be here... Grateful for the beautiful location... Hope to keep coming back... Good idea to make the Villa our alternate meeting place.” These exuberant expressions capture our gratitude for the wonders experienced at Villa del Mar. Likewise, appreciation was expressed for our hostesses who “could not do more” to meet our needs and make our stay enjoyable.
- Being together, praying together, and working together elicited also much appreciation. One person described the experience as “warm and fraternal;” another as, a “nice atmosphere among ourselves,” and “lots of work but we can relax together.” The pastoral sharing’s held particular significance for what it meant to be together with “open minds and hearts” – and another person said, “even more so than before.” Because pastoral sharing holds such importance for the Superiors, in the future they will be scheduled into the agenda, rather than offering it as an option. We were grateful to have M. Eleanor with us and for the insights she offered during the meeting.
- The work that went into the preparation, organization, and facilitation of the meeting did not go unnoticed. Words of thanks were given to the President, D. Gerard, and the Moderators, M. Kathy of Crozet and D. Joseph of Berryville. The agenda was well planned and facilitated. Thanks was given to those who gave reports; also, to M. Kathy Ullrich for her work on the new regional website, to M. Kathy De Vico for onsite preparations, and to the secretaries, Sr. Anna of Mississippi Abbey and Sr. Rose of Wrentham. The prayerful beauty of the liturgies was acknowledged with gratitude to M. Sofia and the cantors. Last but certainly not least, D. Gerard thanked D. Peter for the gift of his wisdom and humor, given so generously over the past 30 years that he has served the Guadalupe community and the US Region as abbot.
- Amid the many expressions of appreciation there were also suggestions of some ways to make the good even better.
 - While this location has much to offer, it is also good to meet in a monastery. Thus, the alternation of meeting place is appreciated.
 - As relaxed as we were during the week, sometimes the schedule seemed somewhat tight. Maybe more interval time could be given in the future.
 - It was noticed that some voices seem not to be heard. Could moderators try ways to encourage all to give voice?
 - One person expressed “frustration” over the delay in attempting something creative in devising a new model for the Regional Secretary of Formation.

In all things we give thanks! Amen. Alleluia!

APPENDIX I

Presentation for the US Regional Meeting

May 22-29, 2024

Changes/Clarifications of the ‘Statute on the Accompaniment of Fragile Communities and on the Suppression of a Monastery’

Introduction

At the General Chapter, September 2022, we approved the “Statute on the Accompaniment of Fragile Communities and on the Suppression of a Monastery”. This paper deals only with **section IV** which treats of ‘suppression’. For our Region, Snowmass is one of the first monasteries of the Order to utilize the new Statute. At present, the ‘Commission of Closure’ for Snowmass continues the work of implementing the suppression. The experience of suppressing the monastery has brought to light a few issues which will be explored here.

A brief review of what is in the Statute...(not included)

Experience of Snowmass

Canonical Status of Snowmass – We have been following the advice of Fr. Dan Ward, OSB, a canon and civil lawyer who has spoken at length with members of the Commission of Closure. The Commission has been working as best it can with the ambiguities in the Statute. Our modus operandi has been as follows:

+ Snowmass is **working towards suppression**, but the suppression will not be complete until the ‘declaration of closure’ is issued, **IV.27**. Therefore, Snowmass while it is closed (vote #63 of the General Chapter-2022, Part II) still has solemn professed brothers living there. The remaining brothers are exploring where they will change their stability. They continue their monastic life with a minimized Divine Office.

+ Regarding the meaning of the GC’s vote to suppress Snowmass, Fr. Dan Ward sent an e-mail to D. Vincent on July 27, 2023: “The monastery is not suppressed but in the process of suppression. Suppression takes place when the decree of closure is issued (**IV.27**). However, the monastic chapter of monks is suspended, and its authority is transferred to the Commission of Closure for both canonical and civil law actions. The monks are still monks of Snowmass until each has transferred his stability.” Fr. Dan emphasized that according to canon law when you have monks or nuns who have not changed their stability, you cannot officially suppress the monastery. Also, with monks or nuns still present, you must have a Major Superior. It is this advice that the Commission of Closure has been following.

Civil Law in the US: Non-profit Status of Snowmass and Capital Gains Taxes

+ In the United States non-profit status for specifically Catholic entities relies on a group exemption issued by the Internal Revenue Service (IRS). Inclusion in this group exemption is tested by whether the entity is listed in the *Official Catholic Directory (OCD)*. The bishop of each diocese has the authority to decide who is included in the OCD. If Snowmass were not included in this group exemption, the sale of the property could be subject to a 30-50% capital gains tax. This could amount to \$30-50 million in tax obligations. To be included in the Official Catholic Directory you must list the name of the Superior and the number of monks living at the monastery. To maintain the non-profit status, it is therefore important that a monastic presence be at the monastery until the property is sold and the assets dispersed.

Recommendations / Revisions / Changes to Statute

Introduction: Given the experience of closing Snowmass and applying the new Statute, we ask the following:

+ That the Law Commission do a working document which delineates the meaning of the General Chapter's vote to close a monastery. This should include, among other points, that with the GC's vote to close a monastery, the monastic chapter of monks/nuns is suspended, and its authority is transferred to the Commission of Closure for both canonical and civil law actions. There is no longer a juridical community. Also, clarity is needed concerning the Father Immediate? Does his authority cease?

+ That with monks or nuns present, who have not changed their stability, there needs to be a Major Superior. You cannot close a monastery while vowed religious are living at the monastery. This point needs to be made clear in the Statute.

+ That when the Commission of Closure is established (voted on) by the General Chapter, it include a mandate for the Commission's work, specifically that the Commission establish a timeline for the monastery's suppression. This timeline must be flexible because the civil law varies country to country. In the case of Snowmass, it is taking longer to close than it may take in other parts of the world because its assets are significant, especially the size of the property. Specifically, in the US to ensure a tax exemption on property and assets it is important to have a monastic presence while the disbursement is being worked through...and this can take time.

+ That the wording of IV.27 be changed / corrected. Fr. Dan stated that it is the Abbot General who issues the 'decree of suppression' not the General Chapter. Therefore, the wording of **IV.27** should be worded something like this: "When the process of closure is entirely concluded, **the General Chapter authorizes the Abbot General in its name** to issue a declaration of closure. The work of the Commission of Closure then ceases."

Summary: Request from the US Region

+ We ask that the Law Commission do a revision of the Statute on the issue of suppression. The working document should clarify the meaning of the GC's vote, how the suppression is to proceed, and to propose possible changes in the 'Statute on the Accompaniment of Fragile Communities and on the Suppression of a Monastery'. The Regions would then study the revisions and at GC-2025 the Regions would share their work.

APPENDIX II

Report on Affiliation at Regional Meeting May 22-29, 2024

Seven areas of concerns from the 14 Commissions of the General Chapter

CO - *Cor Orans*

1 – Geographical closeness seems to be required to have this relationship of affiliation.

- A- Would affiliation be practical when there is a physical distance between two communities?
- B- Just how much interaction will be necessary that would make geographical proximity beneficial?
- C- It seems there may be very few monasteries that could possibly enter into this relationship. What is your thinking on this issue?

2- Could the Region itself be the affiliating community? Com #12 makes this suggestion: Could the President of the Region coordinate aid among the houses of the Region.

- A- Is this even workable?
- B- Of so – does the Region need to be a legal entity in order to fulfill this role?

3- Who initiates affiliation is a question? The working paper added #2 in order to answer this question.

Do you have anything to add to this response?

4- A main concern is the role of the Father Immediate in the Affiliated community: see CO #58.

- A- What suggestions would you make to address this issue? We would want the relationship between the two Fathers Immediate made clear.
- B- Would the additional house be too much for the Father Immediate of the Affiliating House?

5- Formation in the Affiliated House is done in the Affiliating community.

- A- What role will the Affiliated community have in forming their own members/
- B- What if the Affiliated House can contribute some resources to enrich the process of formation; shouldn't they be given a role to partner with the Affiliating House?

C- the Affiliating House?

D- Accomplishing formation can be worked out by the General Chapter according to #8, CO #6.

6- Can Affiliation happen between communities of monks and nuns?

A- This seems like a very forward approach that is worth exploring: What would it look like?

B- Since there are some men's and women's houses that are relatively close to one another, this may be an option.

7- The role of the local superior of the Affiliated House is a concern. That person is appointed by the Father Immediate of the Affiliating house.

A- Is there openness to having the current Abbot or Superior continue to be the Superior of the house?

The Law Commission added to CO #59 detailing the function of the local superior.

Commission #6 wants to add CO #63 that the Affiliating House has the right of supervision over the administration of the affiliated house.

B- Your thoughts on the role of the superior?

Other issues of the Commissions:

- 1- For us as Cistercians, there is a confusing terminology around Affiliation and Filiation.
- 2- Who can serve as an Affiliating House? There are so few houses able to do this.
- 3- The word "celebration" in CO #12 is unusual for us.
- 4- Just make Affiliation part of the statute on Accompaniment of Fragile communities.
See Com #5 for further comments.
- 5- Let the nuns use this and see how it works.
- 6- With this option we can see more opportunities for communities to come together.

APPENDIX III



1



Some of the ways in which we are already practicing Regional Cooperation

- ❖ Regional Meetings: A source of mutual support and the sharing of personnel and other resources required for such gatherings.
- ❖ Pastoral Sharing Groups distinct from those offered at Regional Meetings—Western Region.
- ❖ Superiors of the Region who are (or have) serving on Commissions for the Future for houses in the Region.
- ❖ Sharing of other personnel and provision of Chaplains.
- ❖ Members of our communities serving as Retreat Presenters and other Formation Courses and Lectures to houses in the Region.
- ❖ The Annual Junior Seminar and the cooperation between our houses that this necessitates.
- ❖ Financial Assistance to houses in the Region, in times of special need.
- ❖ Marketing each other's products in our Gift Shops and online stores.

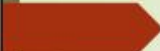
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Additional possibilities for Greater Regional Cooperation

- ❖ A Council/Board of "Senpectae." This was part of Fr. Peter's dream presented at our last Regional Meeting here in California. It would be comprised of Abbots/Abbesses (or other monastics with expertise in various fields).
- ❖ Mutual Support among Superiors: During the COVID pandemic we all experienced a sense of isolation and disconnection. Our Zoom meetings, while not without limitations, offered a valuable means of reconnecting and sharing our experiences and struggles.
- ❖ Optimizing Communication in the Region: Linked to the previous suggestion, is the desirability of improving communication within the region by way of a greater sharing of "news" and being made aware of various significant developments underway in our communities – with due regard for confidentiality and respect for privacy.
- ❖ Formation of "Clusters" of support and cooperation: This idea is one developed by Fr. Joe Tedesco. The idea is that monasteries located in the same region of the country can develop various ways of assisting each other. At Fr. Joe's initiative, the communities of Mepkin, Conyers, Crozet, and Berryville (Southeast region) have begun experimenting with this possibility, and have had two formation workshops open to those in formation in these same communities.

3

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- ❖ A shared Novitiate? One of the challenges (due to become more acute in the near future) is for smaller houses to find members capable of serving as Novice and Junior Director. Can we find practical and effective ways to share some of the resources we have? What of the possibility of novices from smaller houses (with inadequate formation resources) spending time in larger houses as part of their Novitiate?
 - ❖ The Accompaniment of the recently Solemnly Professed: As you will recall at the last General Chapter (in seeking dispensation from the required extended period of Simple Profession), the Order was to reassure the Holy See that those making Solemn Profession after only three years in Simple Vows, would be accompanied (after Solemn Profession) for a suitable length of time. In keeping with this initiative, the suggestion has been made that we develop a program for the US Region that individual monasteries can utilize – without necessarily imposing it on all communities.

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- ❖ Sharing of various resources – spiritual and academic: Would it not be worth cooperating more with things like retreat masters and guest lecturers? For example, a retreat master coming from abroad (as some have done) might be open to giving a retreat to a second community. Similarly, with guest lecturers, might we not alert other communities and either invite attendees from other houses, or offer the courses via live-streaming and similar technologies?
- ❖ Care of the sick, the elderly, and the dying: Given the Spanish example of Monte Sion, is there any possibility that the US Region might set up a similar facility so that monks and nuns who otherwise have to end their monastic life in secular nursing homes, could be cared for in a monastic setting. And, if not an actual new facility, could there be some assistance offered to smaller communities (by large ones) in caring for the elderly?
- ❖ Financial Assistance and Cooperation: The portfolio earmarked for catastrophic medical expenses is one that all houses in the Region have contributed to in the past. Although we have not availed ourselves of this resource, would a Financial Council (a group of “financial senpectae”) be a valuable resource for superiors whose communities are either in financial difficulties, or need help and guidance in fund-raising?

5

Cooperative efforts in Dealing with Fragile Communities within our US Region

- ❖ This is a response to the Abbot General’s exhortation (expressed at the Central Commission Online meeting last December) *urging regional meetings to pay special attention to small [fragile] communities within their region and look for solutions together.*
- ❖ In considering “solutions,” these will, presumably, vary according to the status of each “fragile” community. Thus, a solution for one community might involve assistance in efforts to strengthen it and thereby assist its continuance. However, in another community the “solution” may lie in accompanying it in the process of recognizing its loss of viability and thus initiating the painful process of suppression.
- ❖ Unfortunately, despite the noble intentions in formulating the *Statute on Accompanying Fragile Communities*, the significant number of fragile communities (our Region being no exception) places a real burden on communities entrusted with this accompaniment – that is, communities that are not necessarily flourishing, but only less fragile than those they are generously accompanying.

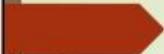
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Some Observations, Responses, and Questions

- ❖ It is well to situate our fragility within the broader context of the Church as a whole. The significant challenges facing the Order are part of a broader struggle underway in the Universal Church.
- ❖ The exit of so many Catholics from the Church and the increasing number of the “Nones” translates into a diminishing number of potential candidates for our life.
- ❖ We need to remain cognizant of history and the inevitable “ups” and “downs” of the Order over the centuries. Thus, weather the storm and await the “turning of the tide.”
- ❖ Also remain aware that certain houses and regions of the Order are significantly less fragile and some are even experiencing modest growth—thus, retain hope and gratitude.
- ❖ An important question: Apart from continuing efforts at “recruitment” and making ourselves better known, is there anything else we can do—or should be doing?
- ❖ A non-rhetorical question: Is God still calling women and men to monasteries that are significantly fragile, though perhaps still considered viable?

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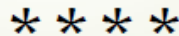
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- ❖ Are there situations in certain monasteries problematic enough that God would no longer call new members to such a communities?
 - ❖ A related question: Does the degree of psychological dysfunctionality within a community partially determine the number of potential candidates God might call?
 - ❖ Can we learn anything from houses that are receiving a greater number of vocations (especially younger persons) – some of which are in the Developed World.

As We Consider Options?

- ❖ In considering the issue of “autonomy,” what role should fellow superiors (in the region) be involved in assessing the viability of another monastery?
- ❖ In assessing viability we need to remain sensitive to the moral and ethical dimensions involved – these include the quality of initial formation and the care of the sick and elderly.
- ❖ In situations where viability is precarious, we might experiment with certain (or all) aspects of “Affiliation” in efforts towards strengthening a fragile community.

8

- ❖ Impractical (perhaps) at this juncture in our Region's history, the other possibility is to implement a process of two fragile houses amalgamating.
- ❖ Although amalgamations are usually intended to enhance viability and allow for the continuance of one (but stronger) community from the two, this could also be for two communities that have closed their novitiates, but retain sufficient health and vitality to sustain a meaningful and fruitful monastic life for an indefinite period.
- ❖ Alternatively, houses that are no longer viable (and do not wish to consider amalgamation), but still have a core group of nuns or monks able to live a life-giving monastic life, might opt to postpone closing and continue their monastic life until it is clearly no longer possible.
- ❖ A more radical choice (one that Fr. Stephen Verbest suggested) is for some of our fragile houses to voluntarily proceed to closure as a means of what he termed "pruning the vine," in the hope that this will enhance the health and vitality of the remaining communities. This recommendation is partly based on the notion that there are presently too many houses in our Region, and too few vocations to sustain them.



9

Some Criteria for realistically evaluating the viability of a community

- ❖ Drawing from the *Statute on Accompanying Fragile communities*, one needs to consider the number of Solemnly-Professed members and their average/median age.
- ❖ When both reflect an advanced age, there is a need to consider any ethical issues involved in accepting significantly younger candidates – considering the formidable challenges facing them, especially if they are alone in the novitiate.
- ❖ To this end, assess the quality and authenticity of monastic community, communal worship, and conduciveness of environment to a life of prayer, contemplation, and growth in Christ.
- ❖ Consider the number, age, and quality of candidates inquiring and expressing interest in joining the community.
- ❖ But, in accepting older/more mature candidates, one needs to consider the question of their age/health in assuming significant offices in the community by the time of their solemn profession.

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- ❖ In “divining” the future, the need to assess the probability of continuance (1) with all present members continuing much as they are – regarding health and ability to assist the day-to-day needs of the monastery, and (2) the declining health (or death) of key office-holders in the community in the period it takes to complete basic formation – that is, at least six years.
- ❖ In the uncertainty of which scenario will play itself out, to wait and see, or to be proactive in taking other steps – seeking affiliation, amalgamation, or closing novitiate and moving towards “completion” – either by advocating closure or “dying in place.”



*The Holy Spirit is Lord and is the Giver of Life. Life we may receive in abundance from Him. Let us not lose our faith in the work of the Holy Spirit! Let us be grateful and live from it. May Mary, the Bride of the Holy Spirit, leads us in that gratitude for our present life. May she help us with her intercession to shape the gift of life to the praise and honor of God's name and to the salvation of all Creation.
All times belong to Him! We live in a time of grace!*

(Dom Bernardus, Circular Letter, Pentecost, 2024)