

# Study Group Resources

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

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# Study Group Resources

## 1. Where to find information

The OCDS Constitutions and Provincial Statutes are our primary resources. Browse them often, make notes, and discuss them in community.

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

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

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

## 2. Paperwork

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

### a. Group history

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

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

The history should include

- how the group was started
- date of founding
- first coordinator and formator’s names (*Given that communities are founded by the Order, these persons are not referred to as “founders.”*)
- first members
- Mentor Community information
- date of elevation to Study Group status
- names of Carmelite friars involved with the group, when and how
- Spiritual Assistants’ names and when connected with the group
- provincial visitors’ names and when they were connected with the group

Interesting but optional

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

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### **b. Record of leadership history**

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

### **c. Record of membership history**

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

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

As a member is admitted to and completes aspirancy and formation for promises, a copy of his/her permanent record is sent to the Central Office Administrator. Members are given copies for their personal records as well. This is especially important when a member moves. It makes the transfer go much more smoothly.

### **d. Minutes**

Meeting minutes are required. Refer to the provincial website, “best practices”, “forming community” for what to include in the minutes.

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

Study Groups email a copy of their minutes to the Central Office Administrator each month.

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

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

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

Groups are free to use whatever method works for them. Most groups change methods as the group’s needs change.

### **f. Finances**

Yes, as mundane as it is, it is necessary to keep track of income and expenses. A three-year budget is recommended because some expenses only come up every three years. Be sure to set money aside for sending representatives to the triennial Plenary Council.

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

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

Always keep group money separate from personal money.

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### 3. Monthly meetings

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

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

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

### 4. Liturgy of the hours

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

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

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

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

### 5. Formation

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

Please see the Statutes section XXI for formation guidelines and goals. Also, see the provincial website for best practices in formation and for online formation materials.

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

Another challenge is ongoing formation for those who are definitively professed. See the Provincial Statutes section XXI, paragraph 4 for recommended resource materials for definitives' ongoing study. Definitives need to avoid the attitude of having "graduated." Formation, like continuing religious education, is a life-long commitment

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### **6. New members**

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

Something that is often overlooked by inexperienced Study Groups is that people interested in entering Carmelite formation must be pre-screened. The local Council is responsible for asking these questions clearly.

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

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

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

### **7. Discernment for clothing in the Scapular (admission to formation for first promise)**

Study Groups are empowered to approve candidates for clothing in the Scapular.

Be sure the candidate has met the formation goals listed in section XXI of the Provincial Statutes. Refer to the provincial website “best practices” “discernment”.

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

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

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

### **8. Discernment for promises**

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

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

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Go to the provincial website “policies” “Study Group profession discernment process” as a starting place. Follow the guidelines in the Provincial Statutes, section XXI. Also refer to the provincial website, “best practices”, “discernment”.

The vote on acceptance is by ballot, not consensus.

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

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

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

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

When a Study Group has a member in initial formation (*before definitive promise*), who becomes unable to attend meetings:

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

Definitively professed members who become homebound remain an important part of their Community, serving Christ through their suffering and sacrifice. See the Provincial Statutes section XVI, paragraph 6. They are not considered to be Isolates, but Infirm Members.

## 10. Transfers

See the Provincial Statutes, section XII to XIV, and the transfer request form near the very back of the “OCDS Legislation for the Oklahoma Province” (spiral bound edition). The transfer form can also be found on the provincial website, “forms” “transfer”.

Be sure members who are moving away have contact information for both their old group (to give to their new Community), and for the Communities nearest their new home. If they are moving to another province, be sure they also have contact information for the Provincial Council for that province.

Please note that the OCDS who is transferring must attend at least six meetings of the new group/Community before being officially accepted. The council of the receiving group/Community votes whether or not to accept the new person as a member. Compatibility is important.

If the new community does not accept the transferring member, the member remains attached to his/her old community.

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### **11. Elections**

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

The votes are not counted locally, but are sealed in an envelope and sent to the Central Office Administrator. The Provincial Delegate appoints a president and councilors for the group. These are usually the members chosen by the group itself, unless there are good reasons to appoint otherwise.

When the results are received, the new council then votes by ballot for a Formation Director (assuming there is more than one person willing/able to serve). Before placing members on the ballot, be sure they are willing to serve. Again, the votes are sealed and sent to the Central Office Administrator. The Provincial Delegate will appoint the Formation Director.

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

### **12. Leadership**

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

### **13. Spiritual Assistant**

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

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

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

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

### **14. Provincial Council visitations**

See the Provincial Statutes, section XX, paragraph 7.

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

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

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

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Afterwards, the group receives a written evaluation from the visitor. The Provincial Delegate may also send the group leadership his comments and recommendations.

### **15. Apostolate**

See the provincial website, “best practices” “apostolate”.

Also read Section VIII of the Provincial Statutes. Especially note paragraph 3: “The Carmelite Community apostolate is to share Carmelite spirituality.” Very simply, our first focus is always on the spread of Carmelite spirituality. In addition to our primary apostolate, priority should be given to the service of the poor.

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

### **16. Feast days and fasting**

See Section XI of the Provincial Statutes.

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

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

### **17. Attendance policy**

Every Community is expected to have an attendance policy. The provincial website’s “provincial policies” page and “best practices” “community” offer help in drafting one.

### **18. Absences**

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

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

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

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

### **19. Leave of Absence**

See the Statutes, Section XVI Community Life 7.

See also the provincial website, “provincial policy” “extending a formation period and leaves of absence”.

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For members who have not yet made their definitive promise:

“A leave of absence is not to be used for someone needing more time for discernment. If someone needs more time for discernment then it should be an extension of formation since the person should continue in formation. If someone in First Promise needs a leave of absence, then they should be released from their promise until they are able to return to the Community.

“That being said there remains the question of what should happen once the person is able to return to Community. The Provincial Council is unanimous in the fact that there should be a reintegration period for a person returning to the Community. Also the person should be required to complete all materials required for that formation period. In no case should a person be allowed to simply pick up formation at the point they left off. Those who were released from their First Promise need to make the Promise again for three more years, not merely for the time left at the point when they were released. Taking a leave and remaking the First Promise is only allowed once.”

For members who have made their definitive promise:

“The Definitively Professed may be granted a one year Leave of Absence for a serious reason that may be renewed by the local council for up to two more years which brings the total to three years at any given LOA. Further extensions may be applied for through the Provincial Council.”

Side note: Leave of absence does not apply to a definitively professed member who has become aged or infirm. These persons remain an important part of their OCDS Community, serving Christ through their suffering and prayer. See the Provincial Statutes section XVI, paragraph 6, and OCDS Constitutions, paragraph 56.

### **20. Community life**

Please see the Provincial Statutes section XVI.

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

### **21. What Secular Carmelites do**

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

- 1 Meditation (30 minutes daily of silence and solitude with God in mental prayer)
- 2 Morning and evening prayer, night prayer when possible (with examen)
- 3 Mass (daily, as able)
- 4 Mary (our model for prayer and discipleship)
- 5 Meetings (we belong to a religious order and our vocation is lived in community)
- 6 Mission (to know God, that God may be known)

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

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See the OCDS Constitutions paragraphs six through 31.

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