

Study Group Resources Handbook

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

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1. Where to find information

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

Other information, such as provincial policies, procedures, and best practices can be found on the provincial website, <https://www.thereocds.org/> under Community Resources. 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 interested in more information on becoming a canonically established OCDS Community. The OCDS Statutes Section XIII: Special Provisions for Study Groups provides more information. There members will find what they need to be working on as their Study Group grows and matures. Take 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 your community Provincial Council visitator.

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 an OCDS Community. A running history of the group, regularly updated, will be easier to follow than trying to piece the information together later.

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

The history should include:

- how the group was started
- date of founding
- names of first coordinator and formator
- first members
- Mentor Community information
- date of elevation to Study Group status
- names of Carmelite friars involved with the group, when and how
- Spiritual Assistants' names and when associated with the group
- provincial visitators' names and when they were associated with the group
- meeting schedules from year to year
- attendance at OCDS Congresses and workshops
- history of the development of the group's formation program prior to the National Formation Program
- group apostolic activities
- important events and items of interest (some communities keep a scrapbook for this)

b) Record of leadership history

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

c) Record of membership history

The group Secretary or other designated member 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 members are admitted to and complete aspirancy and formation for the Promise, an updated copy of their record is uploaded to the pCloud or sent to the Central Office Administrator (COA). Members are given a copy for their personal records as well. This is especially important when a member moves. It makes the transfer go much more smoothly.

d) Minutes

Meeting minutes are required. Refer to the provincial website under Best Practices 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 COA 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. Groups are free to use whatever method works for them. Most groups change methods as the group's needs change. Always use first and last names. Attendance is always noted in the meeting minutes.

f) Finances

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

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

Also see the provincial website, under Provincial Policies, for additional information. Always keep group money separate from personal money.

3. Monthly meetings

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

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

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

4. Liturgy of the Hours

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

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

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. See website under Links for an unofficial copy of Propers). Copies sometimes surface in used bookstores but are often expensive. PDF documents may be found online on different websites for the OCD Proper. You can find the current Proper Calendar with updated prayers on our website under Links-Proper Office.

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

5. Formation

OCDS communities, Study Groups and GIDs must follow the current provincial formation program. A National Formation Program has been approved by the OCD General Definitory for use in the United States provinces. Also visit the provincial website for Best Practices in formation and for the online National Formation handbooks.

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

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

Another challenge is ongoing formation for those who are definitively professed. Definitively professed members should avoid the attitude of having "graduated." Like continuing religious education, formation is a life-long commitment.

6. New members

See the provincial website for discernment under Best Practices 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. 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.

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

- Under 18 years of age;
- Unable, for any reason, to participate in the Sacraments;
- Not Confirmed in the Church;
- If married, not married in 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. If any questions arise contact your PC visitor.

Take this responsibility in determining any impediments very seriously.

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

Study Groups are empowered to admit candidates to Formation I.

Be sure the candidate has met the formation goals set out in the Aspirancy Handbook. Refer to the provincial website under Best Practices, Discernment.

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

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 study group and to the candidate, to face reality and turn the candidate away at the beginning. The Local Council’s first responsibility is to protect the well-being of the community.

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

8. Discernment for the Promise

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

This procedure helps the Study Group’s leadership develop discernment skills. It is a gradual learning experience acquired over time.

Refer to the provincial website, under Best Practices, Discernment for more information.

The vote on acceptance is by secret ballot, not consensus.

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

9. Isolates, aged, and infirm (*see sections 17, 18, & 19 below*)

See Provincial Statutes Section VIII and OCDS Constitutions paragraph 56.

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

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

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

- a. If this person is in a situation demanding all his/her time and energy, it may be a good decision to withdraw temporarily and then come back to the group when able to attend the monthly meetings again.
- b. If this person has become infirm and is otherwise able to do all that is expected of a Carmelite in formation, please contact your Provincial visitorator for advice. These situations are handled on an individual basis. See OCDS website under Provincial Norm for Infirm Status for Members in First Promise.)
- 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 infirm remain an important part of their community serving Christ through their suffering and sacrifice. See the Provincial Statutes Section VIII.5.

10. Transfers

See the Provincial Statutes, Sections XVII to XIX, and the Transfer/Acceptance Form on the provincial website under Forms. See also provincial policies on the provincial website. Be sure members who are moving away have contact information for both their community of origin and for the receiving community.

11. Elections

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

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

Provisional Election Process for Study Groups

See OCDS Provincial Statutes, Section XIII.6-8.

Study Group elections are held early in the year, **no later than March** and in the same year as the Canonical communities pursuant to Section XVI.1 of the Provincial Statutes.

At least three months before the election: The current Council appoints a nominating committee of two or more members to contact the eligible members who have made their Definitive Promise. Those who are willing to serve are put on the ballot. If there are not enough Definitively Professed members able to stand for election, members who made their First Promise (i.e., are in Formation II) may be submitted to the Provincial Council (PC) for consideration for the ballot. It is preferable that any such member in First Promise be in their last year of Formation II.

Once the PC has approved any first promise candidates, ballots are printed before the meeting in which the election is held with notation of who has made Definitive or First Promise. A list of the candidates shall be given to the community at least one month prior to the elections. This allows each member an opportunity to pray for guidance by the Holy Spirit for the outcome of the election.

For the ballots: List all the candidates on one page. The presidential candidates' names are placed at the top of the ballot, marked in bold print to distinguish them from the councilor candidates. Candidates for councilor are listed below the presidential candidates.

At the time of the election, a ballot is given to each professed member (Definitive or First Promise) The members vote by writing "president" next to the presidential candidate they want, and writing "councilor" for each candidate they want for councilor. After choosing one candidate for president, all other remaining candidates on the ballot may be considered for election as a councilor.

Members must be present to vote.

Sample ballot:

Candidates for president are in bold print. Please vote for one person for president by writing "president" next to the name. Members not chosen for president may be chosen for a councilor. Vote for the appropriate number of councilors that has been determined for the study group for this election cycle.	
Susie Carmen	<i>Councilor</i>
John Cruz	<i>President</i>
Terry Avila	
Mary Rose Carmelo	<i>Councilor</i>
Ely Mantel	

Have one member collect the completed ballots directly into a large envelope. Seal the envelope in the community's presence. **DO NOT TALLY THE RESULTS.**

After the meeting:

The current President sends the envelope containing the ballots along with the community roster, all candidates' profession dates, attendance records, and community job experience to the Provincial Council president. After the Provincial Delegate appoints the new Council, review **#12, Leadership** in this document to see how a Director of Formation is selected.

12. Leadership

See the OCDS Constitutions, paragraphs 46-47 and 50-55. Also see the provincial website under Best Practices, Councils and Developing Leadership.

After the Local Council has been appointed by the Provincial Delegate, they discern and pray for a possible Director of Formation. The Local Council sends in their recommendation to the Provincial Council president who will forward the recommendation and consult with the Provincial Delegate. The Delegate makes the decision to appoint a Director of Formation.

13. Spiritual Assistant (SA)

See the OCDS Constitutions, paragraph 44. Also see the provincial website Community Resources, Best Practices, Councils and Developing Leadership, Duties of the Spiritual Assistant.

The group's Spiritual Assistant (SA) should be a Carmelite friar if possible. Carmelite friars have a better understanding of the vocation of the OCDS within the larger Order of Discalced Carmelites. If a friar is not available to serve as the SA, a diocesan priest, deacon, religious, or a professional lay ecclesial minister, with background in and appreciation for Carmelite Spirituality may serve as a SA, with the approval of the Provincial Delegate.

At the invitation of the Council, he may attend meetings of the Council, without the right to vote. (Const. Art. 44). It is not necessary for the SA to attend the monthly community meetings. It is customary to give the SA a stipend for his work with the group.

14. Provincial Council Visitations

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

Study Groups receive a visitation every two years. The purpose of the visitation is to help the Study Group with their development into a Carmelite Community. The visitor's aim is to offer encouragement, information, assistance, and support to the Study Group. The visitor contacts the group's leadership about dates for the visitation, documents needed before the visitation, working out a schedule for the visitation, and other items.

During the visitation, the visitor meets with the group's leadership, talks with members in various levels of formation, and attends the group's monthly meeting. The visitor makes time to see any members who have questions or concerns. The visitor gives feedback on the group's strengths as well as areas that need extra attention. Afterwards, the group receives a written evaluation from the visitor. The Provincial Delegate may also send the group leadership his comments and suggestions.

15. Apostolate

Visit the provincial website under Community Resources-Province Policies and Best Practices.

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

Study Groups are not required to have a group apostolate, but are encouraged to discuss, explore, and experiment in developing one. A mature study group must have an established primary apostolate to be considered for canonical status. See Constitutions Article 28, Statutes Section III: Apostolate, and Provincial Policy OCDS Apostolate.

16. Feast days and fasting

See Section V of the Provincial Statutes.

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

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

17. Attendance policy

Every community and Study Group is supposed to have an attendance policy. The provincial website's Provincial Policies page offers help in drafting one.

18. Absences

When a member is going to be absent, it is important that he/she informs someone designated by the local council as soon as possible. This should be more fully addressed in the attendance policy.

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

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

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

19. Leave of Absence

See the Statutes, Section VIII.8

See also the provincial website, under Community Resources, Province Policy Provincial Norm: Leave of Absence.

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

20. Community life

Please see the Provincial Statutes Section VIII.

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

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

21. What Secular Carmelites do

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

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

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

See the OCDS Constitutions Articles six through 31.

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

This online document is the only one to be considered official.