



CONGREGAZIONE
PER GLI ISTITUTI DI VITA CONSACRATA
E LE SOCIETÀ DI VITA APOSTOLICA

Prot. N. 16805/2008

**INSTRUMENTUM LABORIS
FOR APOSTOLIC VISITATION OF THE GENERAL HOUSES, PROVINCIAL
HOUSES AND CENTERS OF INITIAL FORMATION OF THE
PRINCIPAL RELIGIOUS INSTITUTES OF WOMEN
IN THE UNITED STATES OF AMERICA**

PART A: INTRODUCTION

1. Nature and Purpose

(1) “The Consecrated Life, deeply rooted in the example and teaching of Christ the Lord, is a gift of God the Father to his Church through the Holy Spirit. By the profession of the evangelical counsels the characteristic features of Jesus – the chaste, poor and obedient one – are made constantly “visible” in the midst of the world and the eyes of the faithful are directed towards the mystery of the Kingdom of God already at work in history, even as it awaits its full realization in heaven.” (*Vita Consecrata*, no. 1)

(2) Throughout the history of the Church and now in our own time, religious life offers a prophetic witness, contributes significantly to the mission of the Church and has flourished through many changes and transitions. Religious life expresses the personal and communal witness of countless persons who are truly consecrated to God in service of others.

Aware of the many significant transitions evident in religious institutes of women in the United States since Vatican Council II, Cardinal Franc Rodé, the Cardinal Prefect of the Congregation for Institutes of Consecrated Life and Societies of Apostolic Life, proposed to conduct an Apostolic Visitation of the principal religious institutes of women in that country. His plan received the approval of Pope Benedict XVI in an audience held on November 17, 2008. On December 22, 2008, with faculties granted by Pope Benedict XVI, Cardinal Rodé named Mother Mary Clare Millea, A.S.C.J., as “Apostolic Visitor *ad inquirendum et referendum* of the General Houses, Provincial Houses and Centers of Initial Formation of the principal Religious Institutes of Women in the United States of America.” The specific task of the Visitation is to look into the quality of the life of women religious in the United States who are members of apostolic religious institutes. (See Appendix A)

Cardinal Rodé's Decree (Prot. N. 16805/2008) specifies that Mother Mary Clare Millea would be responsible for transmitting a detailed and confidential report to the Congregation for Institutes of Consecrated Life and Societies of Apostolic Life upon completion of the Visitation, based on information gathered and indicating suggestions deemed appropriate. The Decree also specified that information should be sought from Diocesan Bishops where the above-noted houses and formation centers are located.

(3) The Visitation encompasses the fundamentals of the religious vocation in the Church, namely, consecration by profession of the evangelical counsels through public vow within a particular religious institute wherein members exercise some external apostolic work(s). Particular attention will be given to the significant witness of the vowed commitment given by women religious within the heritage of each institute's charism and in fidelity to the Church's teachings and to the renewal indicated by Vatican Council II and post-conciliar documents. It will examine, for example, promotion and retention of vocations; initial and ongoing formation; the concrete living out of the evangelical counsels; common life and religious houses; the structures and practical application of internal governance; the soundness of doctrine held and taught by the religious; the nature and variety of apostolic works; and the overall administration of temporal goods. (See Appendix B for a brief glossary of terms relative to religious life.)

(4) The Visitation is intended as a constructive assessment and an expression of genuine concern for the quality of the life of all members of apostolic institutes of women religious in the United States whether or not these institutes are manifesting signs of new growth or may have experienced decline during the last several decades.

(5) The Visitation hopes to identify the challenges women religious face and to promote and encourage fidelity, integrity and growth within religious life.

2. Procedure

(1) The Decree of Cardinal Rodé does not specify details of how to proceed with the Visitation. After careful consideration of the responsibility entrusted to her and with the approbation of the Congregation for Institutes of Consecrated Life and Societies of Apostolic Life, Mother Mary Clare chose to conduct the Visitation in four phases.

Phase 1: All superiors general of institutes of women religious which have active apostolic ministries and which have houses as indicated in the Decree were invited to meet with the Visitor or communicate by letter to share their hopes and concerns regarding their own congregation. That phase began on March 30, 2009 and will be completed by July 31, 2009.

Phase 2: All major superiors who are responsible for an institute, province or house of initial formation of women religious in the United States will be asked to provide written information in response to a *Questionnaire of Religious Institutes* prepared for this Apostolic Visitation. Major superiors will receive this *Questionnaire* in September 2009 and will be asked to return the completed *Questionnaire* by November 1, 2009, together with a copy of fundamental congregational documents.

Also in Phase 2, every member of each religious institute is asked to reflect on the questions contained in Part B of this *Instrumentum Laboris*. These questions cover the same basic material that will be in the *Questionnaire* to be completed by major superiors. Because the mandate for this Apostolic Visitation directly concerns “*the quality of the life*” of the sisters themselves, major superiors are to provide a copy of this entire *Instrumentum Laboris* for each of their sisters in the United States and are to invite all the sisters to reflect, personally and/or communally, on the topics included here in Part B.

Phase 3: After careful analysis of the data received, a representative sample of religious institutes will be chosen for an on-site Visit. Such Visits will begin in the spring of 2010.

Phase 4: The Visitor will present a detailed and confidential report with recommendations to the Congregation for Institutes of Consecrated Life and Societies of Apostolic Life.

(2) If any sister wishes to express her opinion about some aspect of her religious institute, she may do so freely and briefly, in writing and with signature, specifically identifying her institute by title and location. In order to respect each sister’s freedom of conscience, any sister may send her written comments directly and confidentially to Mother Mary Clare Millea at the Apostolic Visitation Office (PO Box 4328, Hamden, CT, 06514; or by fax: 203-287-5467) by November 1, 2009.

(3) The on-site Visits to selected institutes will be conducted by a Team consisting of vowed religious who have been officially appointed by the Visitor, with the approval of the Congregation for Institutes of Consecrated Life and Societies of Apostolic Life. All superiors general have been invited to suggest names for possible Visitors in accord with criteria communicated directly to them (See Appendix C). Mother Mary Clare Millea, as Apostolic Visitor, will select the Visitors and will determine who will be appointed to each Visitation Team.

(4) The length of each Visit will vary depending on the number of sisters in the religious institute being visited. Arrangements for each Visit will be made with the major superior through the Apostolic Visitation office. Major superiors are to communicate the names of Visitors and the schedule of the Visit to all members of the entity being visited.

(5) The Visitors will speak individually with the members of the religious community at the site visited as arranged through the Apostolic Visitation Office after consultation with the major superior. In so far as possible, every member of the community at a site visited will at least meet and greet one of the Visitors during the on-site Visit. Sisters who do not reside at the site who request to speak with a Visitor shall be permitted and welcomed to do so at the site visited. The Visit may also include sisters who do not reside at the Visitation site.

(6) All Visitors will be bound by *strict confidentiality*. No Visitor will express any judgment either in writing or orally to the major superior or any other member of the religious institute visited either prior to or during or after the Visit. The Visitation Team will together prepare a specific and detailed report to be given directly to Mother Mary Clare Millea.

(7) Some Visitation Teams may be assisted by administrative assistants appointed by the Apostolic Visitor to aid in preparing written reports of on-site Visits. Those appointed as assistants are also bound by *strict confidentiality* regarding the content of reports prepared.

(8) Each religious institute or center of formation chosen for an on-site Visit will be asked to provide hospitality for the Visitors and Assistants and, if at all possible, transportation costs related to the Visit.

(9) Mother Mary Clare Millea will prepare the final report of the Apostolic Visitation for submission to Cardinal Rodé based on all the information received from all phases of the Visitation.

3. Reference Documents

All phases of this Apostolic Visitation will be guided by the documents of the Holy See which deal with religious life, particularly those of Vatican Council II and pertinent post-Conciliar documents. These include the Vatican II Decree, *Perfectae Caritatis*, and the Post-Synodal Apostolic Exhortation *Vita Consecrata*, other papal documents and various documents of the Congregation for Institutes of Consecrated Life and Societies of Apostolic life which treat identity of religious institutes, governance, vocation promotion and religious formation, spiritual and community life, mission and ministry and financial administration. The principal relevant documents are listed in Appendix D.

PART B: REFLECTION TOPICS FOR THE APOSTOLIC VISITATION

During the Apostolic Visitation, women religious are encouraged to reflect personally and communally on the following topics in the light of *Vita Consecrata*, *Starting Afresh from Christ*, and other documents as well as their own Constitutions and Chapter decisions. *No written response is required to these questions.*

During **Phase 2**, a more detailed questionnaire addressing these same topics will be sent to all Major Superiors and *will require written responses*. The **Phase 3** on-site Visits will address these and additional topics as judged necessary.

- 1. Identity of your religious institute** (*Vita Consecrata*, 1-5; 14-40; 87-91; *Starting Afresh from Christ*, 5-13; *The Service of Authority and Obedience*, 4-11; *The Code of Canon Law*, cann. 573-606)
 - A. What is the understanding of religious life in your institute in light of its charism within the Church?
 - B. What understanding of religious life is taught to prospective and current members of your institute?
 - C. How are ecclesial documents integrated into your theological understanding of religious life?
 - D. What are your concerns about the future of your religious institute in living its charism in the Church?
 - E. How do sisters in your institute understand and express the vow and virtue of poverty? To whom are they accountable for the observance of the vow?
 - F. How do they understand and observe the vow and virtue of chastity? How is their consecration positively expressed?
 - G. How do they understand and express the vow and virtue of obedience? To whom are the sisters accountable for the observance of the vow?
 - H. Do the sisters take other/additional vows? If so, how do they live this/these out?
 - I. Has your institute been involved in, is it now involved in or are you now planning a reconfiguration, federation, merger or union with another congregation or other congregations? If so, how has this integration affected the quality of the life of the institute and of the sisters themselves?
 - J. Is your institute moving toward a new form of religious life? If so, how is this new form specifically related to the Church's understanding of religious life?

- 2. The governance of your religious institute** (*Vita Consecrata*, 46, 49, 56; *Starting Afresh from Christ*, 14; *The Service of Authority and Obedience*, 12-15, 27-30; *The Code of Canon Law*, cann. 587; 617-633; 589-595)
 - A. Is the form of Government in your institute in accord with requirements of the Church regarding superiors, chapters, elections, religious houses etc.?

- B. How is the form of government as stated in your Constitutions effectively operative in your institute?
- C. To what extent is this form of governance evident in the daily, ongoing life of sisters in your institute?
- D. In what way are non-members, including “associates,” involved in the governance of the institute?
- E. What is the process of consultation employed for gathering input and opinions from sisters prior to decision making on significant matters?
- F. Do superiors treat all sisters with fairness and genuine concern and deal compassionately with those who experience difficulties or hold divergent opinions?
- G. What is the process for responding to sisters who dissent publicly or privately from the authoritative teaching of the Church?
- H. What is the process for responding to sisters who disagree publicly or privately with congregational decisions, especially regarding matters of Church authority?

3. Vocation promotion, admission and formation policies (*Vita Consecrata*, 64-71; *Starting Afresh from Christ*, 15-19; *The Service of Authority and Obedience*, 13, 25; *The Code of Canon Law*, cann. 641-661)

- A. Are specific policies, procedures and criteria for admission to the institute clearly specified and followed by those responsible for guiding candidates and admitting new members?
- B. Does your formation program offer your members the foundations of Catholic faith and doctrine through the study of Vatican II documents, the Catechism of the Catholic Church and post-Conciliar documents?
- C. How do your initial and on-going formation programs integrate the most recent documents of the Church concerning religious life?
- D. Do you find your ongoing formation programs adequate and helpful for living your charism effectively in the Church today?
- E. Are there reasons to be concerned about vocations or formation in your institute?

4. Spiritual life and common life (*Vita Consecrata*, 41-45, 47, 93-95, 103; *Starting Afresh from Christ*, 20-32; *The Service of Authority and Obedience*, 16-22; *The Code of Canon Law*, cann. 602; 607-616; 662-665)

- A. How do you express the reality that the Eucharist is the source of the spiritual, communal and ministerial life of the individual sisters and your institute as a whole?
- B. How does your institute express its commitment to strengthening common life through the common celebration of the Eucharist, common prayer, and the sharing of gifts and resources in common?
- C. Are daily Mass and frequent reception of the Sacrament of Penance a priority for your sisters?
- D. Do the sisters of your institute participate in the Eucharistic Liturgy according to approved liturgical norms?
- E. Do the sisters pray the Liturgy of the Hours according to your Constitutions using books approved by the Church?

- F. Do sisters of your institute study and put into practice the approved religious and spiritual exercises which are indicative of your specific charism in the Church?
- G. How does the manner of dress of your sisters, as specified in the proper law of your religious institute, bear witness to the dignity and simplicity of your vocation?
- H. What are the current provisions for care of aging and ill sisters and what is your institute's future plan for their care?

5. Mission and ministry (*Vita Consecrata*, 55, 63, 72-83, 96-109; *Starting Afresh from Christ*, 33-45; *The Service of Authority and Obedience*, 23-26; *The Code of Canon Law*, cann. 669; 671; 673-683)

- A. What is the specific apostolic purpose of your institute as stated in your Constitutions?
- B. Do you see the present apostolic endeavors of your religious institute as viable and effective expressions of your charism and mission?
- C. Which current apostolic projects best represent the focus and purpose of your charism?
- D. What means are being taken to ensure that the charism of the congregation will continue in the case of diminishing presence of your sisters in congregation owned or sponsored institutions?
- E. What are your institute's expectations for ministry in the future?

6. Financial administration (*Vita Consecrata*, 63; *Starting Afresh from Christ*, 19; *The Code of Canon Law*, cann. 586; 634-640; 668; 670)

- A. What is your institute's approach to stewardship of resources and financial administration?
- B. How are individual sisters, including those in positions of authority, accountable for good stewardship of resources?
- C. What are your financial concerns for your institute?
- D. Has the institute transferred ownership or control of any property in the past ten years? Does it anticipate any further transfer of ownership or control of ecclesiastical goods? If so, has it been done according to Church norms? Have the members in the institute been a part of the process?

Appendix A: Decree of Cardinal Rodé (Prot. N. 16805/2008)



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DECREE

The Congregation for Institutes of Consecrated Life and Societies of Apostolic Life has the task of intervening in all that is reserved to the Holy See regarding consecrated life (cf. *Pastor Bonus* n. 108, §1). In order to look into the quality of the life of religious women in the United States, the Prefect of this Dicastery, with the faculties granted to him by His Holiness Pope Benedict XVI, in an audience on November 17, 2008, has decided to nominate, and with the present decree nominates,

Reverend Mother Mary Clare MILLEA
Superior General of the Apostles of the Sacred Heart of Jesus

Apostolic Visitor ad inquirendum et referendum

of the General Houses, Provincial Houses and Centers of Initial Formation
of the principal Religious Institutes of Women in the
United States of America.

Upon completion of this Apostolic Visitation, Mother Mary Clare Millea will have the responsibility of transmitting to this Congregation for Institutes of Consecrated Life and Societies of Apostolic Life a detailed report, based on the information gathered, indicating in its conclusion those suggestions which she deems appropriate.

During her Visitation, the Apostolic Visitor will also seek information from those Diocesan Bishops in whose Dioceses the abovementioned General Houses, Provincial Houses and Centers of Initial Formation are located.

Al things to the contrary notwithstanding.

Vatican City, 22 December 2008

Franc Card. Rodé

Franc Card. Rodé, C.M.
Prefect

+ *Gianfranco A. Gardin, of con.*
Gianfranco A. Gardin, OFM Conv.
Archbishop Secretary

Appendix B: Brief Glossary of Terms

Apostolate (or apostolic work or apostolic action) [can. 675] refers to those works or activities of a religious institute which are carried out in the name of the Church and by the mandate of the Church. They are exercised by members of the institute in accord with requirements of ecclesial communion and in relation to the vow of obedience. The first “apostolate” of religious is considered the witness of their consecrated lives (can. 673).

Charism [can. 578 and can. 631,§1] is a gift of grace freely given by God for strengthening and building up the Church. Charisms are frequently manifest by the emergence of new religious institutes or other forms of consecrated life in any era. A charism is described in can. 578 as the intention of founders/foundresses concerning the nature, purpose, spirit, character and sound traditions of a religious institute as approved by competent ecclesiastical authority. A charism comprises the institute’s entire patrimony or collective heritage which is to be faithfully observed by all. In 1971, Pope Paul VI dedicated a section of the apostolic exhortation *Evangelica Testificatio* to “the charism of founders” (n. 11).

Common life [can. 608] refers to the requirement that members live in a legitimately established religious house where they regularly pray together and have relatively equal access to the same goods and services, etc., which they share in common in contrast to private ownership and use.

Formation [cann. 659-661] refers to the ongoing spiritual, doctrinal, practical and human aspects of personal growth of each member which begins when someone first enters a religious institute and is to continue throughout one’s life as a religious.

General chapter [cann. 631-633] is a collegial body in which the members have equal voice in making decisions which are binding for the entire institute. It is composed of *ex officio* members and other members chosen as delegates by professed members according to the Constitutions. It is to represent the entire institute insofar as possible. A general chapter meets at determined intervals and exercises supreme authority in the institute when in session. Its primary obligations are protecting the institute’s patrimony and promoting suitable renewal in accord with that patrimony (can. 578), electing the supreme moderator (can.620, see **major superior**), approving changes in primary documents and addressing any other matters of major import.

Habit (of the religious institute) [can. 669] refers to the attire worn by members of an institute as particular to that institute as such and which serves as a sign of consecration as well as witness to the poverty which members profess. It is to be described in the institute’s own legislation and is to be simple, poor, modest, and becoming as well as adapted to circumstances of time and place.

Internal governance [cann. 617-630] refers to all aspects of the exercise of authority within a religious institute. It includes, for example: establishing religious houses; assigning members to live in houses; assigning members to specific apostolates; meeting financial obligations for ongoing support; addressing the daily needs of members regarding health, spiritual growth, study, fruitful human development and the like.

Magisterium is described in the Vatican II constitution *Dei Verbum* (n.10) as the teaching office of the Church exercised in the name of Christ by the Pope and Bishops in communion with him as they authentically interpret the word of God, written or handed on, in the deposit of faith which is entrusted to the Church.

A **major superior** [can. 620] is a religious who governs an entire religious institute, a province of an institute, that part of an institute equivalent to a province or an autonomous, self-governing house (such as a monastery). Those who take the place of a major superior according to law, i.e., their vicars, are also major superiors. Their responsibilities are described in general in Canons 617-619 as well as in the proper law of their own institute.

Proper law of a religious institute [can. 587] consists of the fundamental code (often called a *Constitution* and/or *Rule*) which is approved by a competent ecclesiastical authority of the Church, as well as those complementary norms and policies (by whatever name they are called) which are legitimately established by some competent internal authority of the institute itself

A **province** [can. 621] is a canonically established sub-division of a religious institute which consists of a group of religious houses (see **religious house**) of that particular religious institute.

A **provincial** [cann. 620-621] is the major superior in charge of a province of a religious institute.

A **religious house** [can. 608] is a place of residence for members of a religious institute which is formally established by the competent internal authority with prior written consent of the diocesan bishop (cann. 609-610). A religious house is to provide for members to live the religious life of a particular institute according to the purpose and spirit of that religious institute.

A **religious institute** [cann. 576 and 607, §2] is a society in which members, according to proper law pronounce public vows and lead a life in common with other members. Once established, it is a legal entity in the Church with perpetual legal existence and possesses rights and obligations independent from its members. For example, a religious institute as such can own property and engage in financial transactions, etc. A religious institute can be established by the Apostolic See or by a Diocesan Bishop, after he has consulted the Apostolic See (cann. 576, 579). The former is known as a pontifical institute, and the latter, as a diocesan institute (cann. 593-594).

A **superior general** (or supreme moderator) [can. 620] is a member legitimately chosen to be in charge of the entire institute. A superior general is known by various titles in keeping with the charism of different institutes, e.g., Benedictines refer to the superior general as an Abbot or Abbess, while Dominicans use the title Prior or Prioress, etc. Church law uses “supreme moderator” to include all those in charge of an entire institute whatever the specific title may be.

Temporal goods [cann. 634-640 and 1254-1257 (ff)] are all those assets – whether moveable (land or buildings, etc.) or immovable (investments or savings, etc.) – which belong to the religious institute as such and which must be administered according to norms for all ecclesiastical goods.

A **vow** [can. 1192] is a deliberate and free promise made to God of a possible and better good. In religious institutes members profess public vows of chastity (can. 599), poverty (can. 600), and obedience (can. 601) to be observed according to the canons of the Code and their own proper law.

Appendix C: Criteria for Selection of Visitation Team Members

- Willingness to make a public profession of faith and take an oath of fidelity to the Apostolic See
- At least twenty years of religious profession in an institute of Pontifical or Diocesan right
- Current membership in good standing in her/his own religious institute, with active and passive voice therein
- Clear and consistent witness to faithful religious living, in accord with congregational and ecclesial norms
- Spiritual, human and practical wisdom drawn from extensive experience in interpersonal relationships, both within the community and in ministry
- Ability to respect confidentiality, listen attentively, and dialogue honestly
- Capacity for working collaboratively with a team in drawing clear and fair conclusions
- Ability to perceive, verify and clarify essential ideas and data
- Ability to prepare a written report in a timely manner which is objective, unbiased, accurate and succinct
- Ability to identify strengths and areas of concern based on data gathered

Appendix D: Documents of the Holy See for use in the Apostolic Visitation

Second Vatican Council Documents

Dogmatic Constitution, *Lumen Gentium*, especially nn. 43-47 (1964).

Decree, *Christus Dominus*, especially nn. 33-35 (1965).

Decree, *Perfectae Caritatis* (1965).

Papal Documents

Pope Paul VI, Motu Proprio, *Ecclesiae Sanctae*, nn. 10-12, 15-17, 21-22 (1966).

Pope Paul VI, Instruction, *Renovationis Causam* (1969).

Pope Paul VI, Apostolic Exhortation, *Evangelica Testificatio* (1971).

Pope John Paul II, Encyclical Letter, *Veritatis Splendor* (1993)

Pope John Paul II, Apostolic Exhortation, *Redemptionis Donum* (1984).

Pope John Paul II, Post-synodal Apostolic Exhortation, *Vita Consecrata* (1996).

Pope John Paul II, Encyclical Letter, *Fides et Ratio* (1998).

Canonical Documents

The Code of Canon Law, especially cann. 573-709 and 731-746 (1983).

Sacred Congregation for Religious and Secular Institutes, Decree *Iuris Canonici Codice*,
transitional norms for adjusting Constitutions to the revised *Code of Canon Law* (1984).

Other Documents of the Apostolic See

Sacred Congregation for Religious and Secular Institutes [**hereafter abbreviated as SCRIS**],
Decree, *Ad Instituenda Experimenta* (1970).

SCRIS, Decree, *Experimenta circa* (1972).

SCRIS and Congregation for Bishops, Joint Directives, *Mutual Relationships between Bishops
and Religious* (1978).

SCRIS, Document of Plenary Session, *Religious and Human Promotion* (1978).

SCRIS, Document of Plenary Session, *Contemplative Dimension of Religious Life* (1980).

SCRIS, *Essential Elements in the Church's Teaching on Religious Life* (1983).

Congregation for Institutes of Consecrated Life and Societies of Apostolic Life [**hereafter abbreviated as
CICLSAL**], *Directives on Formation in Religious Institutes* (1990).

CICLSAL, *Fraternal Life in Community* (1994).

CICLSAL, Instruction, *Inter-institute Collaboration on Formation* (1999).

CICLSAL, Instruction, *Starting Afresh from Christ* (2002).

CICLSAL, Instruction, *The Service of Authority and Obedience* (2008).

From the Vatican, July 14, 2009