Overview

- Introductory Remarks
- Historical Overview
- Church Norms
- Current Issues
- Associate Handbooks
- Charism
- Concluding Remarks
Historical Background

- 3rd Century – Hermits relate to individuals
- 4th – 11th Century Benedictines - Oblates
- 12th Century Mendicants – Third Orders
- 17th Century Religious Congregations
- 20th Century Associate Programs

1917 Code of Canon Law

- Codified earlier Church law restricting right of Institutes to create associations
- Required an apostolic privilege for creation of Third Orders
- Used the following terms to classify different types of lay associations
  - Secular third order
  - Confraternity
  - Pious Union
1983 Code of Canon Law

- Reflects theology of Vatican II
- Expanded the nature and formation of associations of laity and/or religious
- Book II – The People of God
  - Associations of the Faithful
  - Hierarchy
  - Consecrated Life

Associations Of The Faithful

- Purpose – to strive by common effort
  - to promote a more holy life
  - to foster public worship or Christian doctrine
  - to exercise other apostolic works, namely
    - evangelization
    - to exercise works of piety or charity
    - to animate the temporal order with the Christian spirit

Canon 298 §1
**Associations of the Faithful**

- Associations whose members share in the spirit of some religious institute while in secular life, lead an apostolic life, and strive for Christian holiness under the higher direction of the same institute are called third orders or some other appropriate name.

  Canon 303

**Innovation of Associate Programs**

- Call for a relationship of equality, where associates “live the charism in the first person and share the gifts of the Spirit in full co-responsibility.”

- Most contemporary associations have chosen to remain informal, that is, not seeking formal recognition.
Religious Institute

- To provide a stable form of life where members can join together
  - for the building up of the Church (the Body of Christ)
  - by total dedication to God
  - through the profession of the evangelical counsels and
  - the striving for perfect charity (love)
  - in the service of the world,
  - thereby making the professed a sign in the body of believers of the next life. (c. 573.1)
- and to carry out the particular purpose(s) of the Religious Institute according to its Constitutions, Directory and other proper law.

Canonical membership

- Provides an identity
- Establishes rights and obligations
  - Right to all things necessary for the vocation
  - Right to community life
  - Right to be governed only by other members
  - Obligation of participation in governance
  - Obligation to observe the mind and design of founders regarding the nature, purpose, spirit, character and sound traditions of the institute
Canon 677 §2

- Church raises only one expectation for a religious institute which has associates: “…institutes are to assist them with special care so that they are imbued with the genuine spirit of their founder (the institute’s.)

- All other expectations flow out of the relationship that is developed between the two groups according to the proper law of the institute and the descriptive document of the associate program.

Lynn Jarrell, Associates…
Contrasting Perspectives

Full Inclusion
- Associate groups have become so integrated within the community that associates are considered co-members of the institute.
- This concept of associate/co-membership has been called the beginning of a marked transformation in the very identity and understanding of religious life.

Necessary Boundaries
- Concerns are being raised as to the effect such programs have on the existing Institute and its sense of identity.
- Those who advocate co-membership have been charged with mixing the two distinct lifestyles and losing sight of the true core connections between associates and professed.

Contrasting Perspectives

Full Inclusion
- Religious communities are called upon to extend membership to the laity in that the future of religious life lies in a vital amalgamation of the fully vowed religious membership and association of lay people who would in actual fact be members of the religious institute.

Necessary Boundaries
- The question is raised as to why the two are being so closely mixed together and still claiming two levels of commitment and two different rules of life.
- Viewing associates as members blurs the boundaries that create the identity of the institute and that in that very process contributes to its own demise.
Support for Full Inclusion

- New forms of Religious Life have arisen at several points in the history of the Church and what is now being proposed would be such a new form.
- Law follows life. We must move outside the canonical boundaries as was done in the past.
- Such a change would not destroy Religious Life but could integrate it more fully … by fostering the breakdown of artificial boundaries and promoting the common commitment of like-minded people to a transformed future.

Non support for full inclusion

- A conviction that there is some intrinsic contradiction involved in the attempt to combine full membership with a membership that does not espouse certain basic coordinates and dimension that have been a recognizable part of Religious Life over the centuries.
Essential Coordinates

1. Catholic Christian faith
   - Monotheistic, Trinitarian and Christocentric.
   - Visible and communal ecclesiology, including recognition of
     - the Petrine ministry
     - the normativity of Scripture in the revelation process and
     - sacramental life

Sandra Schneiders, Finding the Treasure …

Essential Coordinates

2. Consecrated Celibacy - religiously motivated, sexually abstinent, nonmarriage chosen in free response to a personal vocation individually discerned


Sandra Schneiders, Finding the Treasure …
Essential Coordinates

4. Community or common life – a lifelong commitment in a particular, selfsame and recognizable community
   - Economic interdependence of the members; that is a permanent and total commitment of all personal economic resources
   - Participation by the members in the community’s governmental structures or procedures according to the Rule or statutes of the Institute
   - The permanent acceptance of the community itself as the primary and determining relational context of one’s life.

Sandra Schneiders, Finding the Treasure …

Relational Context

- An individual’s choice to be member is one entered into freely and knowingly by an individual within the context of a group which is committed to a common spirituality & a common life (expressed in the group’s mission.)
- To be member is to become enfleshed to each other
- The enfleshment of your lives begins with the act of profession (just as to be a follower of Jesus begins with the desire for and the actual act of baptism.)

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Relational Context

- Profession is the gift of self in response to the movement of the Spirit within that has been recognized (validated) by other individuals living the consecrated life.
- A life commitment is established among the members by their act of profession to each other and the life of the whole.

Lynn Jarrell OSU, Associates...

General Principles

- The relationship between the Associates and the institute needs to be expressed clearly without trying to change the nature of each group or altering the obligations and rights of the individuals who belong to each group.
- The two commitments (profession and associate covenants) are distinctly different and are not two types of relationship in a given foundation.

Lynn Jarrell OSU, Associates...
General Principles

The professed acquire certain rights and obligations by this total commitment which cannot be shared justly with persons who are not professed, violating the essence of the act of profession.

This is more than government; it entails all that impacts the common good, common life and common mission of the professed.

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General Principles

The associates acquire rights and obligations with each other according to the way the program is established. However, these rights and obligations cannot be described primarily by being in the midst of the life of the institute and its members nor by unduly sharing the obligations or rights of the professed with them.

For this reason it is very important that the Associate Handbook speaks sufficiently about who the Associates are, separate and apart from their relationship with the Sisters.

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Practical Issues

- Members whose rights are violated could object
  - Invalidity of elections?
- Challenge of identifying and maintaining boundaries
  - What is governance and what is simply our life together?
  - Does presence of associates impact the freedom of members to participate?
- Changes the nature and purpose of the institute, with likely long term consequences.
- Civil law issues arise.

Civil Law

- Civil courts lack jurisdiction to determine the qualifications of members or their rights and obligations in a religious institute, however the civil law protects the right to voluntarily join with other like minded persons to pursue a common end.
- Civil courts will use neutral principles of law to determine rights and obligations.
Potential Issues

- Taxes - Religious order is a 501(c)(3) corporation
- IRS has indicia of membership which does not apply to associates.
- Tax exemptions
  - Care of the member is a charitable purpose; care of associates is not.
  - Any special benefits to associates could violate rules against private benefit or private inurement.

Potential Issues

- Retirement and Health Care – the charitable purpose, which is the basis for the tax-exemption, only applies to members.
- Housing – If an associate lives in a house of the institute, tenancy rights would likely apply.
- Standards for resolving conflicts in civil law are based on the nature of the relationship. The more clarity the better.
Governance

- Governance of the associate program is a voluntary organization separate from, though related to, the association that is made up of members of the religious institute.
- Rights and obligations of associates, as well as governance of the program should be set forth in the handbook or bylaws of the program.
- Finances – depending on how formal the structure, can keep finances totally separate.
Purpose of Associate Handbooks

- To define the ends and goals of any Associate program or relationship and
- To give associates increased clarity in the identity and stability of the program concerning
  - the spirit and nature of the program or relationship
  - the spiritual focus and practices
  - the admission process

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Purpose of Associate Handbooks

- the meaning and act of committing to the program or relationship
- the rights and responsibilities of each associate
- apostolic endeavors
- the relationship to the Unit or Congregation whose spirit is shared and
- the financial aspects
  - Is there an expectation that associates will pay something toward the operation of the program?
  - Clarity that the institute does not provide financial support to individual associates.
Evaluating An Associate Handbook

- Does the document take sections of your Constitutions, and inappropriately apply them to the Associates?
- Does the document adequately address the issue of baptism in a consistent manner?
- Is the Plan of Association clear about organizational structure?
- Is there clarity concerning what the expectations are concerning inclusion in the institute activity or is the language very broad and open to much disagreement and interpretation?

Evaluating an Associate Handbook

- Is there clarity concerning what the institute offers to the Associate and who in the institute is actually obligated to provide it.
- Are financial arrangements clear? Are there appropriate disclaimers or statements concerning what the financial expectations are? Is there information as to any support the Unit will give to the Program and what individual Associates will be expected to pay for
Evaluating an Associate Handbook

- Government – Is there clarity as to how the associate program will be governed, including criteria for leadership as well as termination criteria?
- Is there language that inappropriately gives associates the right to “participate” in unit deliberations?

SHARING THE CHARISM
Innovation of Associate Programs

- Call for a relationship of equality, where associates live the charism in the first person and share the gifts of the Spirit in full co-responsibility.

  Bruno, S., *Horizons*…

Vita Consecrata

- Today, often as a result of new situations, many Institutes have come to the conclusion that their charisms can be shared with the laity.
- The laity are therefore invited to share more intensely in the spirituality and mission of these Institutes.
- In the light of certain historical experiences such as those of the Secular or Third Orders, a new chapter, rich in hope, has begun in the history of relations between consecrated persons and the laity.
**Vita Consecrata**

- “...new experiences of communion and cooperation should be encouraged for various reasons. They can in fact give rise to the spread of a fruitful spirituality beyond the confines of the institute.”
- Care must be taken that the identity of the internal life of the institute is not harmed.

**Theology of Charism**

- Charism is not a property. It is not a possession; it is not transferable, and not controllable.
- Charism is a deeply historicized social phenomenon which cannot be duplicated in any other time or place.
- Whenever charism does recur in some historical tradition, it is reinvented in a new social and historical setting.

Bernard Lee, *A Socio-Historical Theology of Charism*
Deep-story

- A narrative structure
- Unique, incarnated spirit
- All the elements found in canon 578, purpose, nature, spirit, character and sound traditions or heritage.
- It is a necessary condition for charism, but it is not the charism.

  Bernard Lee, A Socio-Historical Theology of Charism

Charism

- Charism is the meeting of the deep-story with the needs of the age.
- In addition to being that founding grace or historical burst of energy that continues throughout the life of an institute, charism must also be renewed and re-articulated during any renewal phase of religious life so that it may meet the new needs of the age that is precipitating the renewal

  Bernard Lee, A Socio-Historical Theology of Charism
Cries of Our Age

- Every charismatic moment reflects the cry of the age and the cry of one age is never identical to the cry of any other age.
- In order to have an understanding of the cries of the age, religious communities must be deeply inserted into their own culture and must experience for themselves its essential passions.

Bernard Lee, *A Socio-Historical Theology of Charism*

Cries of Our Age

- Alienation and fragmentation that comes from relativism?
- Violence and reactionary domination or fundamentalism that comes as we try to embrace pluralism?
- Need to reclaim mystery, which is emerging from quantum physics and our views of the universe?
- Something else??
Sharing the Charism

- Renewal and rearticulating of charism is being joined by those who wish to engage this energy in service to themselves and others.
- Do not wish to do so out of the entire identity of membership in a religious institute, including the constant coordinates
- Rather out of a portion, that is, its spirit and perhaps some of its heritage and traditions

Bernard Lee, *A Socio-Historical Theology of Charism*

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Sharing the Charism

- Foster the emergence of the laity as full and equal partners without promoting dependence or “quasi-religious” status.
- A truly lay spirituality or expression of our charisms must
  - emerge from lay experience
  - be constructed on lay premises
  - develop lay leadership and
  - promote a kind of personal practice and ministerial involvement that is compatible with and truly transformative of lay life

Sandra Schneiders, *Finding the Treasure …*
Resources