

Restoring and Nurturing Right Relationships

A Resource to Guide the Formation
of Religious for Ministry

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Restoring and Nurturing Right Relationships

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Foreword

Restoring and Nurturing Right Relationships has been developed by Catholic Religious Australia as a national resource to support Religious Institutes in their continual development and evaluation to improve approaches and processes for initial and ongoing formation. Religious Institutes are taking an increasingly multi-faceted approach to formation to honour, form and stretch the whole person entering religious life and living as Religious.

Building on the first edition (2016) publication, this second edition recognises that the Australian Church has entered a new stage in the formation for religious life, following the realities made transparent by the Royal Commission, but also encouraged by new emphases of Pope Francis, who has highlighted the formative process as having “an eminently communitarian character from its very origin... not undertaken individually, but always with reference to a solid portion of the People of God” (Francis, 2022). <https://www.vatican.va/content/francesco/en/speeches/2022/november/documents/20221110-corso-seminari-americalatina.html>

Inspired by Pope Francis’ vision, and led by the movement of the Spirit, this document has grounded formation in the task of restoring and nurturing right relationships amongst all God’s children, integral to the vocation of Religious in the establishment of the Kingdom of God.

Images in the publication have been chosen to reflect the life-giving energy that the Spirit breathes into all, especially into the formation of Religious – a vibrancy which transforms us and leads us on a path that is continually evolving, as we seek Christ’s will for our lives.

We acknowledge the authors of the first edition, *Nurturing Right Relationships* (2016), Tom McDonough CP, Rosie Joyce CSB, Frank Dineen MSC and Kevin Dance CP for their wisdom and expertise in creating a national resource for formation for religious life.

We thank those who wrote and edited the second edition, *Restoring and Nurturing Right Relationships*, David Leary OFM (Lead Author), Anne Walker, Emma Carolan and Ambrose Payne FSC. The National Council of Catholic Religious Australia reviewed, and approved the document in July 2023.

We also offer our sincere thanks to the Passionist Fathers who funded the design and production of both editions.

We invite you to live religious life to the fullest.

Yours in Christ,

Peter Jones OSA
President

Anne Walker
National Executive Director

Introduction and Context

The paramount norm for religious life is following Christ as set forth in the Gospels:

“Faithful to their profession then, and leaving all things for the sake of Christ (cf. Mark 10:28), Religious are to follow Him (cf. Matt. 19:21) as the one thing necessary (cf. Luke 10:42), listening to His words (cf. Luke 10:39) and solicitous for the things that are His (cf. 1 Cor. 7:32) (*Perfectae Caritatis*, 5, 1965).”

In this context, Religious are asked to look to the past with truthfulness, to live in the present with passion and honesty, and to embrace the future with faith, courage, hope, and joy.

The vocation of Religious is to proclaim the Word of God and give witness to the world in accord with Gospel principles with full respect and love for all human beings (Pontifical Council for Interreligious Dialogue, et. al., 2016). The call to be and to build the Kingdom announced by Christ is an invitation to:

“Wake up the World... rather than living in some utopia... find ways to create alternate spaces where the Gospel approach of self-giving, communion, embracing differences, and love of one another can thrive (Pope Francis, 2014).”

Restoring and Nurturing Right Relationships: A Resource to Guide the Formation of Religious for Ministry therefore seeks to identify key concepts for healthy and ongoing formation, and to promote safeguarding, which are integral to the task of Kingdom-building. The focus of this document is on the values, attitudes and behaviours that are congruent with professional standards, safeguarding and mature human sexuality. It is in keeping with the professional, moral, and ethical expectations of Religious Institutes and the wider Australian community.

We are committed to life-long formation for we are committed to discovering the footprint of the Divine across the length and breadth of our lives and deepening our sense of mission and purpose as individuals, and within a community.

The material is offered to Leaders and members of Religious Institutes to support policy and programme development, and the implementation of regulatory and procedural practices, particularly with respect to the recruitment, screening, and continuous formation of Institute aspirants and members.

A document that focuses on restoring and nurturing right relationships, on the formational experience of Religious, focuses on members at all stages of their religious life. We are committed to life-long formation for we are committed to discovering the footprint of the Divine across the length and breadth of our lives and deepening our sense of mission and purpose as individuals, and within a community. This experience is not always easy or smooth, and will include detours and interruptions, but we recognise that those times are key opportunities for growth. This document can only be read with this principle in mind. And so, the document’s subject language will sometimes refer specifically to ‘candidates.’ At other times, it refers to ‘members’ or ‘members of the Religious Institute,’ a term that applies to novices through to finally professed members. The ‘candidate’ references guide the reader to the specific demands and supports required of and for members before their final profession. This document focuses on formation being for everyone and for all time.

In the Shadow of Abuse

This document is premised on the ancient and yet perennial theological and psychological truth: Grace (theology) and Growth (psychology) happen as we set ourselves on the path of restoring and nurturing right relationships.

In that spirit, we begin by acknowledging seminal shadow moments. They are a part of the fabric of our Church and our national psyche, and hence our life as Religious. We are authentic as Religious to the degree that we acknowledge and face our past and our present, with lessons to be learned and work still to be done.

The first to be named is the sexual abuse crisis, perpetrated in and by the Church. The initial iteration of this document was produced in 2016, which locates it during the life of the Australian *Royal Commission into Institutional Responses to Child Sexual Abuse* (Royal Commission) (2013-2017). The Final Report of the Royal Commission was tabled in the Australian Parliament on 15 December 2017. At that time, while we had clear indications of the changes that would be required of us, the enormity of that change was yet to be fully contemplated or realised.

It has always been, and continues to be, in Jesus that “we live and move and have our being” (Acts 17:28), but now we also, and indisputably, live and move and have our being in the shadow of the abuse crisis that has beset the Church and many institutions in Australia and across the world.

The Final Report of the Royal Commission is a constant reminder to us of the brokenness of our humanity and of the ecclesial community. It calls us to know, understand, and learn from the failure of Religious Institutes and Dioceses to protect children and vulnerable adults.

In his *Letter to the People of God* (2018), Pope Francis reminds us of the communitarian nature of abuse; the suffering it creates for victims of abuse, and the profound impact on the entire ecclesial community. If we are to regain credibility as a gospel people, and as Religious, we must “listen from the heart and with humility” to

It has always been, and continues to be, in Jesus that “we live and move and have our being” (Acts 17:28), but now we also, and indisputably, live and move and have our being in the shadow of the abuse crisis

those who suffer because of our failures, and to “beg forgiveness of all those” who have been offended through our words and actions (Francis, 2018).

In revising the 2016 document, *Restoring and Nurturing Right Relationships* seeks to create a renewed understanding of formation of Religious for life and ministry, grounded in our history, set on our Catholic tradition, and reformed by the tragic reality of abuse we have squarely faced.

We also continue to face our unfolding understanding of the violence and massacres committed against First Nations peoples—and the fundamental denial of their dignity as persons—which leaves an indelible mark on our national story. The truths told by our First Nations people has sharpened our focus on atrocities committed against them in this country. A sobering picture is painted of abuse of power in the missions and elsewhere, violence, and the destruction of human life, kinship and family relationships and ancient cultures.

We recognise and live these tragic realities, and as Pope Francis has said,

“We are challenged as the People of God to take on the pain of our brothers and sisters wounded in their flesh and in their spirit. If, in the past, the response was one of omission, today we want solidarity, in the deepest and most challenging sense, to become our way of forging present and future history (Francis, 2018).”

Both of these tragic realities within Australian Church history form an integral part of our thinking on formation, and the programmes we provide to those who enter our Religious Institutes.

Formation as Restoring Right Relationships

We cannot explore our charism, our theology, or our psychology, without transparently facing the reality of who we are in this country. We cannot create a future—for our Religious Institutes as for our nation—without acknowledging and living, with courage and honesty, the history that is us. We cannot nurture right relationships without restoring relationships, without repair after rupture.

Jesus often demanded of us that we face the reality of our relationships where fear often abides, but where Jesus knew the Divine is to be found. This is what formation is also called to achieve: a focus on our reality, searching for a voice, with hope and faith that this is where the Divine will be discovered. These guidelines outline a framework focused on that lifelong journey of discovery.

It was Francis of Assisi (1182-1226) who developed the simple and yet profound theological and psychological notion that bringing the Kingdom to life, here and now, requires repentance and renewal, to restore right relationships. We know from history that he lived this dictum, most poignantly through his movement towards and commitment to the marginalised of his time.

Modern psychology picks up on this theme when it proffers that repair after rupture must be our relational norm, where significant growth—as individuals and as community—is achieved through gentle and yet deliberate processes of reconciliation and healing.

Jesus often demanded of us that we face the reality of our relationships where fear often abides, but where Jesus knew the Divine is to be found.

Formation as Nurturing Right Relationships

Formation for religious life and ministry is a life-long journey where I seek to live authentically, as a person and a Religious, and to proclaim the Gospel message arising out of my authentic life, within the life and Tradition of the ecclesial community and our Religious Institutes. The goal of formation for life and ministry is that we engender, within ourselves and within each other, an openness to the Spirit that changes us as individuals and as a community.

The hope of formation for life and ministry is that we live life each day as loving towards all creation, compassionate and humble, reflective and thoughtful, prayerful and courageous.

Life-long formation requires of us that we embrace and manage our personal and community limitations, and that we seek to understand our human weakness as a God-given moment of Grace (1 Cor 12:10; Luke 15:11-32; John 4:4-42).

The hope of formation for life and ministry is that we live life each day as loving towards all creation, compassionate and humble, reflective and thoughtful, prayerful and courageous.

A New Way of Being

The call of Christ within the Gospel is an invitation to seek life, “to live it to the full” (John 10:10) and to live with God at the centre of our being and of our ministry. It is a challenge to stand in right relationship with all of God’s creation, to recognise the inherent dignity of all and to relate in ways that witness to connection, understanding, compassion, justice, and liberation. A choice to live in this way enables mutual transformation through a genuine human engagement that honours and ensures practical dignity for all, and the protection of those who are vulnerable. Proactive and protective behaviour living up to the message and model of Christ is one of acting and standing in right relationship with all of creation, making real the Kingdom of God, especially for those whose lives have been marked by the loss of dignity through abuse, poverty, homelessness, and a loss of purpose.

Mutual transformation through a genuine human engagement that honours and ensures practical dignity for all

A Time for Commitment and Action

We, Catholic Religious Australia - representing men and women, monastic and apostolic, sisters, brothers, priests of Religious Institutes and Societies of Apostolic Life - offer these guidelines for our Institutes' formation documents and processes.

In the shadow of the tragic realities within Australian Church history, and with our eyes fixed on the many, varied, and rapid social changes occurring in our world, we recommit ourselves to the provision of rigorous formation guidelines, which focus on every facet of our humanity.

Moreover, we recognise and commit to the challenge to listen with open hearts to the cries of the poor and to respond in ways that develop mutual transformation graced by love, mercy, and compassion.

We acknowledge and endorse the vision and norms laid down by the Holy See in the Decree *Perfectae Caritatis* (1965) and the various Exhortations and Instructions given to us since Vatican II.

We acknowledge and endorse those requirements established by the Church concerning the protection of children and vulnerable adults.

We are committed to upholding and implementing the professional and safeguarding standards as established by Catholic Religious Australia and the Australian Catholic Bishops Conference, and by our own Religious Institutes, as central in our response to the findings of the Royal Commission.

We encourage each Religious Institute, and every Religious, to commit to a renewed level of accountability

We recognise and commit to the challenge to listen with open hearts to the cries of the poor and to respond in ways that develop mutual transformation graced by love, mercy, and compassion.

in life and ministry, through the renewal of formation processes, through individual and corporate behaviour, and through the ministries under their care.

For those Religious called to minister as priests, we align the relevant aspects of Religious Institute formation to the Australian norms as developed and revised by the Australian Catholic Bishops Conference in the *Ratio Nationalis Institutionis Sacerdotalis* (2007, Revised 2014, 2015, as updated from time to time).

We acknowledge with shame and sorrow the crimes and abuse committed by individual Religious against children and vulnerable adults. With sorrow and shame, we also acknowledge the neglect, denial, abuse of power by and past inaction by, and silence of, our Religious Institutes and their leadership.

We are committed to learning from these flaws and failures of the past and to renewing our Religious Institutes in the light of the crises we have faced. We are likewise committed to maintaining and enhancing a culture that safeguards and protects the dignity and rights of all.

PART ONE

A Culture of Continuous Formation



A Culture of Continuous Formation

Religious formation is a continuous, dynamic, and complex process of personal and communal transformation.

Religious formation guides, shapes, and nurtures the thinking, heart, choices, and actions of the individual Religious and the Religious Institute.

At its best, religious formation helps the individual Religious to create a deeper appreciation and understanding of our true self, and of our relationships, with all of creation.

Religious formation:

- Challenges us continually to develop self-understanding so we may live authentically and make a difference in the world
- Occurs in a variety of settings connected to life and ministry. It is most often viewed as an individual exercise, but it is also communal. Where formation is focused on the individual, the longed-for outcome is personal change. Where the focus is on the entire Religious Institute, the sought-after outcome is community renewal and development
- Connects us to an Institute's sources, charism and its history. As Pope Francis has indicated, "Whenever we make the effort to return to the source and to recover the original freshness of the Gospel, new avenues arise, new paths of creativity open up, with different forms of expression, more eloquent signs and words with new meaning for today's world" (*Evangelii Gaudium*, 11).

Authentic religious formation necessarily connects us to the world in which we are located, to "the joys and the hopes, the griefs and the anxieties" of the people to whom we are called to minister (*Gaudium et Spes*, 1).

Authentic formation—be it initial or ongoing—begins with an assessment of individual and community needs, a focus on the humanity of each person and the psychological tools required for growth, a clear understanding of charism, history, and theology, an emphasis on formation in dialogue with cultures, and a commitment to transparent formation processes with clear expectations on all parties, and delivered in a professional manner by formators trained specifically for the task.

The three sections that follow - Foundations of Formation, Responsibilities of the Institute, and Expectations of and on the Formator and Candidate - constitute a practical perspective to the development and provision of a culture of continuous formation. While each focus area and accompanying descriptors possess a unique focus, each contributes to a view of formation which is characterised as dynamic in its application, comprehensively systemic in its nature and scope, and holistic in the outcomes it seeks for all involved.

Foundations of Formation

FOLLOWING JESUS CHRIST

Formation aims to welcome those who seek to know and follow Christ, and assist them to:

- Commit to personal growth and development of maturity
- Develop self-awareness, self-understanding, an appreciation of strengths and weaknesses, a capacity for repair after rupture in relationships and an appreciation and acceptance of intrinsic goodness and the presence of the Divine within
- Develop, grow, sustain, and repair socially appropriate and mature relationships
- Support a personal relationship with God and commitment to discerning God's will within a communitarian framework
- Support a deep love and personal conversion to Jesus Christ
- Develop and sustain a grounded, authentic, and mature moral life based on guidance, reflection and the development of an informed conscience
- Create and sustain a sensitivity to justice, right relationships, and the care of all creation
- Serve and witness to God's Kingdom announced by Christ
- Develop the skills to live and work effectively with others in community

ENGAGING THE CHARISM

Formation should provide opportunities to:

- Engage with the Institute's sources through a thorough and sustained exploration of the Religious Institute's origins, Founder, traditions, oral and written history, the original charism, and understanding of the Religious Institute
- Articulate and deepen a contemporary understanding of the Religious Institute's charism
- Be reflective and communicative regarding their personal history and the connection of that personal narrative with the story of the Religious Institute
- Experience communion and community with members of the Religious Institute
- Make and sustain a public commitment to discipleship of Christ, the evangelical vows, and integrity of ministerial practice, within and through the Religious Institute

Foundations of Formation

ACCOMPANYING THE JOURNEY

To support the formation journey with:

- Compassionate, reliable, stable, transparent and honest accompaniment
- The necessary resources and time for formation at every stage of the person's life and ministry
- Culturally diverse and culturally sensitive input, tasks, processes, expectations, and outcomes
- The availability of professional and experienced formators, including Religious, lay and independent persons, specifically trained for formation tasks
- Independent, professional, appropriate, transparent, and respectful psychological assessments at various stages within the formation process
- Post-assessment support aimed at assisting the Candidate or member of the Religious Institute to comprehend any assessment reports or appraisals, and the best use of the assessment and suggestions for personal change and growth and future formation direction
- Professional help with clearly negotiated rules and boundaries relating to privacy and confidentiality, and the protection of personal information and data
- A formation programme appropriate to the learning stage and needs of the individual and the needs of the Religious Institute

PREPARING FOR MISSION

To support collaborative preparation for mission, focused always on the needs of the Religious, the Religious Institute, and the broader ecclesial community, through assessment and dialogue on:

- Opportunities and invitations for prophetic witness in lifestyle and ministry
- The needs and aspirations of the community seeking to engage an individual Religious, or Religious Institute for mission
- Questions of sustainability of any proposed or planned mission
- Identifying the personal and communal, educational and other, resources needed for mission
- Discerning, defining, planning, and implementing professional or pastoral supervision and other reflective processes
- Defining, planning, and implementing appropriate systems and processes to ensure pastoral practice accountability

Responsibilities of the Institute

BUILDING A HEALTHY CULTURE

To develop and authorise formation policies that:

- Have transparent processes and stages, with clear and definite markers and transitions
- Have an unambiguous statement that candidates cannot be accepted for formation, who have a history of perpetrating abuse and violence against any person. Candidates cannot be accepted for continuing formation, if after an investigation, have substantiated and/or confirmed allegations of perpetrating abuse or violence
- Have clear and accessible expectations generally, but in particular, regarding the normative engagement of the candidate or member in professional/pastoral supervision throughout the formation journey and in religious life
- Proceed on the principle of 'gradualism,' that is, increasing responsibility and accountability at each new level of formation
- Consider the particular needs, unique experiences and gifts of the individual
- Provide for a mixture of ages, cultures, backgrounds and adapt formation based on age, culture and background of the individual
- Commit the appropriate number of formators for the number of candidates
- Recognise language proficiency challenges for formators and/or candidates
- Provide clear lines of authority and processes for appeal by the candidates
- Reflect the policies of the Institute in dealing with bullying, harassment, discrimination, and the use of digital technology and social media
- Reflect the Institute's culture and commitment to, and policies for, the safeguarding and protection of children and vulnerable adults
- Focus particular attention on experiences and behaviours that are antagonistic to religious life and ministry
- Are regularly evaluated, approved, and assessed under the authority of the Major Superior
- Require the provision of suitable and regular safeguarding training to formators as well as those in formation
- Comply with National Catholic Safeguarding Standards
- Provide that those from different cultural backgrounds, will be made aware of cultural expectations of Australia
- Are consistent with the Institute's policies, including complaint handling policies and safeguarding policies

Responsibilities of the Institute

PROVIDE A FORMATOR

Religious Institutes ensure that the Religious engaged as a formator lives meaningfully within the Institute, is imbued with its charism, is appropriately trained for the task of formation, and can be entrusted with its ministries. From this wellspring of training, reflection and experience, the formator must exhibit the following professional qualities and processes:

Qualities

- Commitment to the formation experience
- Able, mature, and experienced Religious
- Professionally prepared for the Ministry of Formation
- Appropriately resourced, both personally and professionally
- Committed to their own psychological health, maintenance of personal relational supports, personal supervision, and spiritual direction
- Able to give the appropriate priority to the Ministry of Formation
- Be accountable for their ministry and provide regular reporting to the appropriate formation boards and to the Major Superior
- Treat candidates with equality, justice, respect, fairness and honesty and without prejudice or partiality

Processes

- Ensure the candidate is in a safe physical and psychological environment, where professional and personal boundaries are identified, respected, and practiced
- Have regular individual conferences with the candidate
- Provide appropriate feedback and assistance so the candidate may respond more knowledgeably and authentically to what may be asked of them
- Aid the attainment of good physical, psychological, and general health for those in formation
- Put in place regular assessment procedures, with appropriate and timely dialogue and feedback to the candidate and to the Major Superior
- Assemble and provide required assessments and reports to the Major Superior that are true and complete, not withholding information required by leadership to support their definitive decisions concerning the candidate in formation
- Maintain the confidentiality of all documentation and reports on the candidate
- Communicate all canonical and congregational requirements, on the candidate and by the formator, at every stage of formation
- Report immediately to the appropriate authority any allegations of abuse of a child or vulnerable person in accord with relevant civil society laws, and the protocols laid down by the Institute, Catholic Religious Australia and the Australian Catholic Bishops Conference, as applicable

Responsibilities of the Institute

SUPPORTING FORMATION IN THE COMMUNITY

The Religious Institute is to encourage the community of members to be:

- Open to and supportive of the diversity and uniqueness of each individual
- Adaptive to the diverse generations and lifestyles of members of the community
- Prayerful and balanced in its life and ministry
- Exercising informed judgement regarding the presence and consequences in the community of Religious who are not able to contribute to the life of the formation community in a positive and respectful manner
- Recognise, assess and attend to indicators of dysfunctionality in community
- Prepared to assist the candidate, the formator and support the Ministry of Formation
- An authentic witness to the Charism of the Institute in action
- Respectful and keeping appropriate boundaries in their relationship to the candidate and the formator, and collaborating in accord with the formation process

Expectations: the Formator and the Candidate

THE FORMATOR

Religious Institutes seek and appoint formators who are competent and committed to oversee and/or provide the following for candidates for religious life:

- Professional formation processes and the maintenance of systems and documentation required by Church and Institute
- A professional and comprehensive assessment of the candidate – this will usually involve professional, independent psychological assessment and reference checks. When a candidate has already been in a formation programme for religious life or priesthood, references must be sought from those responsible for their previous formation
- Dialogue in a patient, sensitive, and respectful manner, generally and on the outcome of the comprehensive assessment
- Review of the candidate's outcome from the National Criminal History Check and relevant State-based compliance check (commonly referred to as Working With Children Check), and arrangement for such to be verified or validated if required, for candidates in Australia
- Review of information contained within the candidate's police check or equivalent from the country where they are residing, for candidates from overseas
- Assessment of and sensitive response to the personal and sexual history of the candidate, appropriately respecting the privacy of the candidate and confidentiality requirements
- Assessment of family history before entry or during formation to assist in personal integration
- Education to inform, explain, and ensure that all candidates understand the importance of professional standards and safeguarding protocols concerning the protection of children and vulnerable adults
- Education on working in ministry with children, including on childhood development
- Education on working in ministry with vulnerable adults
- Refusal of candidates for formation who have a history of perpetrating abuse and/or violence against children and/or vulnerable adults
- Refusal of candidates for continuing formation, who after an investigation, have substantiated and/or confirmed allegations of perpetrating abuse or violence

THE CANDIDATE

Religious Institutes seek candidates who demonstrate a commitment to and/or experience of:

- A genuine response to the Gospel call and message, and a personal relationship with Christ
- A desire to seek God wholeheartedly
- A level of maturational development appropriate to living a communal life and collaborative ministry
- A history of constructive and life-giving relationships, unburdened by significant and ongoing responsibilities for family and personal possessions
- Sufficient and appropriate educational qualifications
- A life of faith, prayer, involvement with Church, and engagement in ministry
- Appropriate life experience, affective maturity, and psychosocial health
- No criminal record together with a capacity and commitment to meet statutory requirements for working with children and other vulnerable people
- Experience with and sufficient knowledge of the Institute
- A willingness to consider and embrace change and development in faith and religious practice as might be relevant and necessary
- An openness to psychological assessment and independent commentary as to one's suitability for religious life
- A willingness to engage in regular professional and/or pastoral supervision, with an understanding that such supervision characterises the on-going maturation in religious life

PART TWO

Formation Dimensions



Formation Dimensions

Formation is a life-long process. Good and healthy formation will capture the diversity and complexity of the Church, her thinking, and the experience of our modern world.

There are however, set periods of initial formation to which the Religious Institute gives particular attention: Pre-Novitiate, Novitiate, Temporary Profession, and the first years after the candidate professes final vows. On-going formation is then facilitated and supported for the rest of the life of the member of the Religious Institute. Formation will focus on specific domains within the formation experience: Human, Intellectual, Pastoral, and the Spiritual dimensions of the person.

What follows is an elaboration of these four specific domains on which initial, continuing and integrated formation is based. While identified separately, each of the dimensions, and the nominated characteristics which define them, come together to become fully integrated with the processes supported by the formator and those engaged in the formation process.

Human Dimension

DEVELOPMENTAL CHARACTERISTICS

Formation in human attributes will include:

- A recognition of the damage caused, to self and others, by clericalism (see Appendix 1)
- Personal care and social integration
- Balanced and supportive interpersonal relationships internal and external to the Institute, within and between genders, and across cultural and religious norms
- Experience of positive and collaborative relationships, both within and outside the work-related environment
- The ability to live simply, to respect the practices and processes of those in authority, and to exercise personal leadership within a communal context
- The capacity to be self-motivated
- The capacity to look towards long-term personal and ministry goals in the process of formation
- The ability to nurture a culture of reflection, and a capacity for reflexivity and the development of self-insight with others, both within and outside the formation experience
- A capacity to make decisions that lead to a sense of unity, belonging, and growth
- A capacity for personal responsibility and ownership of faults and failings, and a growing ability to engage in repair after rupture both in life and ministry
- Affective maturity and personal integration, appropriate to age and stage of life (see Appendix 2)

PROCESS ELEMENTS

Accompaniment in formation is assisted by:

- Regular and consistent individual meetings with the formator
- Regular and consistent spiritual direction
- Regular and consistent professional/pastoral supervision
- Professional and psychological assistance where needed
- Education, reflection, and discernment on psychosexual development
- Formation and training in communication, conflict resolution, and reparative action
- Assistance in developing a nuanced understanding of the theology and practice of the vows, with particular reference to chastity
- Support of an understanding of and attentiveness to the importance of:
 - › Self-care
 - › A balanced lifestyle
 - › Provision of opportunities to establish healthy mutual relationships across genders
 - › Maintaining physical and emotional boundaries
- Education and support in relation to addictive behaviours and appropriate and inappropriate use of digital technology, including social media

Intellectual Dimension

DEVELOPMENTAL CHARACTERISTICS

Formation of intellectual attributes is supported by:

- Education and training in biblical, systematic, and pastoral theology and spirituality
- Processes that facilitate an in-depth understanding of the meaning and practice of consecrated life and of the charism of the Institute
- Participation in academic, professional, and vocational education in accord with ministry needs with particular relevance to the vocational works of the Institute
- Developing skills in identifying justice and social issues, social analysis, theological and pastoral reflection, and praxis
- A commitment to ongoing personal growth and development within ministry as it unfolds
- The ability to reflect on and share openly with others their practical experience of pastoral activities
- Participation in regular and ongoing education and training focused on professional standards, safeguarding, and the candidates' and members' obligations and responsibilities under civil and canon law

PROCESS ELEMENTS

Support for education and professional development will entail:

- Ensuring academic and pastoral programmes are faithful to the requirements of the Church, the particular norms of the Religious Institute, and the civil law of the jurisdictions where the Religious Institute exists and where ministry occurs
- Identification and preparation for work with the poor, children and vulnerable persons, or otherwise marginalised people, in keeping with the charism of the Institute
- Participation in programmes that focus on understanding and reflecting on the broad social, cultural, and religious experience of the ministry context
- Monitored and guided supervision in ministry
- Education and training on collaborative processes for discernment and pastoral activities in ministry

Pastoral Dimensions

DEVELOPMENTAL CHARACTERISTICS

The basis for Christian mission and witness entails:

- Acceptance of Jesus Christ as the supreme witness (John 18:37)
- Sharing in the witness of Christ through the proclamation of the Kingdom, service to neighbour and the wholehearted gift of self
- Demonstration of the joy, hope, mercy and compassion that are integral to Gospel service
- Recognising Christian witness occurs in a pluralistic world and means engaging in dialogue with people of different denominations, religions and cultures
- Acting in solidarity with one another in community and ministry activity through witness to Christ
- Commitment to a Gospel life and mission characterised by awareness, understanding and protection of children and other vulnerable persons
- Recognising that while personal transformation in Christ is ultimately the gift of the Holy Spirit, we are called to purposefully reflect and act for good

PROCESS ELEMENTS

Preparation for pastoral works will entail:

- Reflecting on experiences and developing awareness of the revelation of God in day-to-day activities
- Provision and/or facilitation of education and training in justice and social issues, skills in social analysis, theological reflection and pastoral reflection
- Facilitation of experiences where candidates and members can work with and learn from people who are poor, vulnerable, or otherwise marginalised
- Securing from candidates and members an acceptance of and commitment to pastoral supervision and ongoing professional training and development

Spiritual Dimension

DEVELOPMENTAL CHARACTERISTICS

Awaken and nurture the interior life and its connection to authentic love and service to others (John 15: 12-13; Jam. 1:22):

“It is necessary therefore that the members of every community, seeking God solely and before everything else, (the members of every community) should join contemplation, by which they fix their minds and hearts on Him, with apostolic love, by which they strive to be associated with the work of redemption and to spread the Kingdom of God.

Let those who make profession of the evangelical counsels seek and love above all else God who has first loved us...strive to foster in all circumstances a life hidden with Christ in God. This love of God both excites and energises that love of one's neighbour which contributes to the salvation of the world and the building up of the Church. This love, in addition, quickens and directs the actual practice of the evangelical counsels (*Perfectae Caritatis* 5-6).”

PROCESS ELEMENTS

Supporting a healthy and life-giving spirituality through modalities such as:

- Finding life in prayer, engaging in a rich Eucharistic and sacramental life, reading the Scriptures, attentiveness to personal and communal prayer, meditation, spiritual reading, engagement with solitude, regular retreats, spiritual direction, practical charity, and a devotion to Mary
- Encouraging prayer within the community, the Local Church and within the ministries of the Institute

PART THREE

Wellbeing, Professional Standards and Safeguarding and Culture



Wellbeing, Professional Standards and Safeguarding and Culture

Nurturing the ongoing development of the human, intellectual, pastoral, and spiritual dimensions of religious life unfolds when formation recognises and explores every aspect of the person.

That exploration, and the development of understanding, must include helping and supporting the person to explore and understand their psychosexual wellbeing.

If we ignore any aspect of the person in the formation process, we undermine a capacity for an informed and authentic commitment, and we risk truncating their healthy living and expression of religious life and ministry. We also undermine the person's capacity for continual learning about and reflection on personal power, its use and abuse.

Psychosexual Wellbeing

DEVELOPMENTAL CHARACTERISTICS

Psychosexual wellbeing (see Appendix 3) is evidenced in:

- A developing capacity for self-knowledge, personal insight and understanding, and an appropriate and non-pathologised use of discipline
- A growing and balanced appreciation by the person of their physical, psychological, intellectual, and spiritual attributes
- A balanced understanding of personal flaws and weaknesses
- A capacity to maintain and sustain relationships, and to practice repair after rupture in relationships
- An appreciation that healthy, mature fraternal/sororal relationships with others is an opportunity for positive personal regard, and the experience of joy and contentment
- An acute appreciation that personal power and expressions of celibate intimacy are always tempered, guided, and bounded by sensitivity to the other
- An understanding of the social contracts that underpin that fabric of our civil and ecclesial communities
- A spirituality that embraces and does not reject any aspect of the person, and appreciates the need for loving relationships
- Avoidance of behaviours that compromise the integrity of the person as loved and loving, such as pornography, abuse of alcohol or food, or the use of illicit substances or abuse of legal drugs

PROCESS ELEMENTS

The formator will possess, model and promote:

- A positive understanding of the physiological, emotional, and psychological elements of human sexuality
- The meaning and value of the vow of chastity and the loving and generous expression of that vow
- Guidance towards a lifelong growing to sexual maturity
- A lived experience of the self-sacrifice involved in a life of chastity
- Guidance in setting and respecting appropriate boundaries in relationships
- Education and training in being aware of the warning signs of a personal life which is out of balance
- Education of the ethical, abusive and addictive realities in pornography
- Awareness that problematic personal behaviours may be symptomatic of deeper personal issues and a loss of personal balance

Professional Standards in Safeguarding of Children and Vulnerable Adults

DEVELOPMENTAL CHARACTERISTICS

Candidates and members will commit to:

- Obtaining a National Criminal History Police Check
- Obtaining a child compliance check (most commonly referred to as a “Working with Children Check”) or its equivalent, for the jurisdictions where ministry will occur
- Understanding and maintaining the legal requirements of Commonwealth and State government legislation regarding the safeguarding and protection of children
- Abiding by the requirements of the Religious Institute’s Code of Conduct and other policies, procedures, and protocols focused on the safeguarding and protection of children and vulnerable adults
- Abiding by the requirements of any relevant safeguarding documents as developed and agreed to by Catholic Religious Australia and the Australian Catholic Bishops Conference
- Acknowledging their legal obligations for responding to, recording, and reporting any form of harm or abuse to children and vulnerable adults
- Engaging in professional/pastoral supervision

PROCESS ELEMENTS

The formator, in conjunction with the Institute’s safeguarding personnel, works to ensure candidates and members are informed of:

- Civil laws on abuse, bullying, harassment, and discrimination
- Civil reporting guidelines and responsibilities as they relate to allegations of abuse of children and vulnerable adults
- Policies of the Institute concerning the above areas, and in particular, to those related to safeguarding of children and vulnerable persons
- Safeguarding policies and norms of the dioceses where ministries of the Religious Institute are located, as relevant
- Expectations of compulsory and regular safeguarding training and in-services on professional standards and safeguarding
- Appropriate and inappropriate use of digital technology, including social media

Cultural Issues – Formation Within and Outside Australia

FORMATION AWARENESS

Those arriving in Australia for formation and ministry will be introduced to:

- The multicultural nature of Australia and the nature and scope of religious life within the Australian context
- The many and varied expressions of multiculturalism
- Normative culture in regard to attitudes towards and treatment of women, and expectations and values regarding non-clerical attitudes and behaviours
- The safeguarding and professional standards normative culture, practices and expectations within Australia
- The variety of pastoral situations within which mission and ministry find expression

Formation expectations for Australian residents ministering overseas will include:

- Accepting the civil legal and Church requirements of professional standards and the safeguarding and protection of children and vulnerable adults in the country where formation occurs
- Where such legislation and requirements are lacking, upholding Australian civil requirements and the policies of the Australian province, which they are obliged to follow wherever their formation occurs

FORMATION SUPPORT

Those from other countries and/or cultures will be assessed as to their adaptive capacity for:

- Use of the English language and its many nuances (idiom, accent, and comprehension)
- Understanding power, authority, sexuality, relationships, faith and its expression, ministry, Church, religious life, and the variety of lifestyles that are evident within Australian society
- Accepting cultural demands including the dignity of every person, respect for women and children, setting respectful boundaries and appreciating and accepting appropriate behaviour
- Engaging in spiritual direction and accompaniment, and pastoral supervision on a regular basis, with the inclusion of a focus on safeguarding responsibilities as required by the National Catholic Safeguarding Standards
- Accepting the cultural values and practices in relation to the safeguarding of children and vulnerable adults, within Australia

Formation support for Australian residents ministering overseas will involve:

- Proper preparation and education in the language, customs, and culture of the country
- Education in local requirements with respect to ministry, civil law, canon law and diocesan requirements where ministry occurs
- Accompaniment and support to ensure the candidates in formation are sensitive to the culture in which they are living and ministering

PART FOUR

Assessment and Evaluation

Assessment and Evaluation

Assessment and evaluation occurs at two levels:

- The assessment and support of the individual candidate, the associated discernment as to Institute membership, and the candidate's capacity for ministry
- The appropriateness and effectiveness of the Institute's formation programme and its efficacy with each candidate

The assessment of candidate suitability will be transparent in its operation and confidential in its application. Consideration will be given to the appropriate assessment tools and methods to be applied. This is particularly relevant where candidates are from non-western backgrounds and cultures.

The effectiveness of the assessment process will be contingent on the degree to which transparency, trust and confidence are established.

The test of a healthy and respectful assessment is its capacity to, and effectiveness in, supporting candidates on their personal journey in response to the call of the Gospel as it finds expression within the life of the Institute.

As a part of ongoing formation, members will also undergo yearly appraisals or performance reviews, which provide an opportunity for accompanied reflection

The effectiveness of the assessment process will be contingent on the degree to which transparency, trust and confidence are established.

on the health of one's religious life and ministry, and identification of areas for growth, as detailed in the Institute's safeguarding or relevant policies.

The Institute's capacity to provide effective, relevant and respectful formation will be reflected in the Religious Institute's appointment and training of formators, the development of a formation programme relevant to the candidate, and the implementation of formation policy. This systemic responsibility will entail regular and substantial assessment and evaluation, and it will inform on-going formation goals and processes arising from the Institute's commitment to continuous openness to the changing ecclesial and societal demands in the living of the charism.

The sections that follow highlight the elements that comprise the assessment and evaluation of candidates, and the overall assessment and evaluation of the Institute's performance in the provision of formation processes.

Assessment and Evaluation of Candidates

DEVELOPMENTAL CHARACTERISTICS

Growth in a capacity for living religious life, in a healthy and loving manner, is dependent on the experience of gradual and adaptive growth, and discernment processes that accompany that adaptive growth. This growth occurs across several important domains: the relational, intellectual, affective, pastoral and spiritual. Each person's adaptive growth, with its own rhythm, is characterised by:

- Continuing and transparent reflection, discernment and assessment by the candidate
- Reflection and discernment by the candidate with the formators and the formation community on the formation experience
- Acknowledging that evaluations can deepen the self-knowledge of the candidate and assist the Institute in discerning the candidate's readiness to move to the next stage of their formation
- Understanding that continuing reflection, appraisals and guidance characterise on-going maturation in religious life
- The setting of goals, reviewing of progress and discernment of new goals that assist development, and support evaluation

PROCESS SUPPORT

Formation programmes will provide clear expectations and markers for movement and transition within the formation programme. Where appropriate, these movements and transitions may be ritualised and celebrated with due regard to the following:

- Regular individual conferences with the formation team
- Regular consultation with external resource people, such as health professionals, counsellors, and psychologists
- Assessment by a psychologist prior to major points of commitment (e.g., final vows, diaconate, priesthood)
- Regular assessments by the formator, appointed boards (including lay people), and the Religious community, with appropriate feedback given to the candidate
- Self-assessments, peer review, assistance in achieving personal goals

Assessment and Evaluation of Candidates

DEPARTING THE RELIGIOUS INSTITUTE

Although we hope for a flourishing of religious life in Australia, not everyone who seeks to live a religious life is called to such a life. Upon discernment and/or assessment, candidates depart, or are asked to leave, and this facet of religious life needs careful consideration. The focus of that consideration must be on how candidates leave, and what support is offered to former candidates as they transition into a new role within civil society and the ecclesial community.

Key considerations in transitions out of religious life include:

- The mental health of the person
- The psychological needs of the person before and during the transition out of religious life
- The capacity of the person to access any required transitional support
- The financial capacity of the person to gain housing and social support benefits
- The training needs of the person in transition
- The general social support needs that may be required during the transition

Departure from a Religious Institute should be seen as a normal part of the formation process. As it invariably involves an experience of loss and grief, departure must be dealt with in a sensitive manner.

Departing religious life is not the same as, or even like, leaving employment in a particular company. Regardless of capacity and appropriateness, a departure from a chosen way of life can trigger an existential crisis. Great care must be taken with those who depart religious life. In concert with the transitioning person, individual transition plans should be developed prior to departure from the Religious Institute. Appropriate levels of pastoral support must be provided to the former candidate after the person has formally exited from the Religious Institute.

Assessment and Evaluation of Institute Processes

INSTITUTE LEADERSHIP

The Provincial (or equivalent) and Council of the Religious Institute has governance oversight of the formation programme, appointing formators, who act on behalf of the Provincial and Council, and implement policy and procedure. These leadership responsibilities entail:

- Development and implementation of a formation policy, programmes, protocols, and procedures to:
 - › comply with canon law and the Institute's Constitutions and Statutes
 - › comply with civil legislation
- Development and implementation of a formation policy, programmes, protocols, and procedures informed by:
 - › best practice advice from social science research and experience
 - › best practice advice on safeguarding of children and vulnerable adults
- Periodic review of the formation policy, programmes, protocols, and procedures to ensure compliance with the requirements of the Religious Institute, candidates, changing Commonwealth and State legislation and the learnings from the Royal Commission
- Meeting a duty of care to ensure that formation is meeting the highest standards, is in accord with personal and communal expectations and utilises independent appropriate expertise and support, including lay people as necessary
- Care needs to be taken to ensure that matters which belong to the internal forum, that is, to the level of conscience, remain in the internal forum. Only those matters that are public and open, that is, in the external forum, can be used in the discernment of the suitability of candidates for profession or ordination. Because of this, canon law makes it very clear that in the admission of students to Orders or their dismissal from the seminary, the vote of the candidate's spiritual director or confessor can never be sought (Canon 240 §2)

Conclusion

Relationships are central to all our endeavours, in life and in ministry. Any personal change or transformation likewise has its origins in formative and transformative relationships.

Our relationships manifest deeply held beliefs about human dignity and growth and serve as the principal means for knowing self and contributing meaningfully to a society. They reflect the importance of all creation and call into being the foundational Gospel principle of love.

Restoring and Nurturing Right Relationships: A Resource to Guide the Formation of Religious for Ministry is offered to Religious Institutes at a time of intense community assessment and commentary. In this light it is generated as not only a resource arising from Gospel, Church, and Institute traditions, but also as a sign of the priority of learning from ministry practice, where failures in people and processes warrant practical and immediate attention.

Leaders and members of Religious Institutes are encouraged to review and apply the concepts and ideas shared in this document. It is a statement for, about and by us at a time of movement into new awareness and new processes. It is both timely and important.



Appendices



Entitlement, Superiority and Clericalism in Religious Men and Women

Religious aspire to be servant leaders, those who ‘smell of the sheep,’ who live a lifestyle that identifies them with those they serve rather than differentiates them.

The notion that Religious and priests are a privileged group, whose special status sets them apart, and exempts them from the norms, rules and consequences that apply to everyone else in society is to be challenged. To the Community of the Pontifical Pius XI Regional Seminary of Ancona, Pope Francis (2021) said:

“Clericalism is a perversion of the priesthood: it is a perversion. And rigidity is one of the manifestations. When I find a rigid seminarian or young priest, I say ‘something bad is happening to this one on the inside.’ Behind every rigidity, there is a serious problem, because rigidity lacks humanity.”

This sense of clericalism has its roots in narcissism. It sees some people as more important than others and is founded on the belief that one is inherently, or because of their perceived status, deserving of privileges or special treatment.

PREFERRED

- An orientation towards reaching out to others, being approachable and available, and being of service
- A healthy balance of availability and work, with relaxation, hobbies and personal interests, so as to not always be identifying as a cleric/Religious
- An understanding that emotional, behavioural, spiritual, and relational struggles throughout life are normal, and that one should promptly seek appropriate assistance in facing these
- Humility, a capacity for “not knowing,” and an ability to listen deeply
- A capacity for joyful self-sacrifice and acting beyond the call of duty
- Behaving in ways that humbly and reverently nurture the growth and vocation of all
- Respecting and appreciating the gift of different charisms, spiritualities, qualifications and ministries
- The ability to work collaboratively with a variety of people, including across genders and with laity, being respectful of the role and function of all
- The ability to accept constructive criticism, creating an environment where others feel comfortable to offer such advice
- Consulting widely and appropriately (including with lay people), seeking consensus, provision of feedback, and appropriate shared decision-making responsibilities, prior to making important decisions
- Exercising prudence in the use of one’s status or institutional power, never using these for personal gain
- Upon joining a community, respecting the pre-existing life, customs, history and vision of the persons in that community
- Discouraging the development of a lay-driven clericalism centred on oneself
- A capacity for rest and relaxation, combined with strategies to address stress and negative emotions
- An ability to laugh long and generously at life, its challenges and its failures

Entitlement, Superiority and Clericalism in Religious Men and Women

PROBLEMATIC

- Arrogance or superiority, including towards or over other genders, cultures, ages or laity
- Always knowing and always explaining rather than being open to not knowing with an openness to learn, accepting the invitation from others to gradually understand
- Establishing relationships through an abuse of institutional status or power
- Encouraging the development of personality cults centred on oneself
- Over-spiritualising behaviours, one's own or that of others
- Lacking empathy in interacting with others
- Being judgemental and critical of others
- Failing to collaborate with or consult widely with others during ministry or before making important decisions
- Failing to recognise, respect or appropriately draw upon the expertise and experiences of other Church members, or relevant persons beyond the Church, including those who are not Religious
- Isolation or relating only with those served pastorally or during the course of ministry
- A lack of hobbies or personal interests beyond the responsibilities of religious life
- Failing to recognise a need for assistance, and seek appropriate and timely help

Practical Indicators: Personal and Emotional Health

Formation supports the growth of the human person to achieve effective functioning, strength of character, maturity, positive social and emotional balance, social, emotional and spiritual intelligence, and with life satisfaction, joyful and hopeful service, resilience and self-transcendence as outcomes of the immediate and the longer-term commitment.

POSITIVE

- Have a healthy sense of self with appropriate self-insight
- Able to accept authority
- Non-defensive in recognising one's gifts and also one's limitations
- Have a capacity to let go of hurts and resentments
- Able to exercise self-discipline
- In touch with one's emotions and one's motives for action and non-action
- Growth in the ability to express and share one's emotions appropriately
- Possess a clear sense of one's life goals and purpose
- Able to measure decisions against one's values and principle
- Show evidence of integration of their needs with their vocational values and attitudes
- Openness to difference in the 'other'
- Able to live with difference and to analyse and negotiate these differences
- Able to experience and express appropriate levels of intimacy with others
- Able to forgive and integrate the experience of conflict and failure into one's life experience
- Able to work towards long-term goals
- Able to cope with the stresses of taking and implementing decisions
- Able to live with the inevitable isolation inherent in leadership

PROBLEMATIC

- Constant levels of anxiety
- Constant feelings of depression or incompetence
- Inability to express strong negative or positive emotions in a healthy way
- Regular experience of having feelings of inadequacy, guilt or anger, or repression of anger
- Tendency to withdrawal and/or avoidance of contact
- Unable to be challenged and the need to always be right
- Regular difficulties with sleeping, with eating, alcohol, or other substances
- Regular rather than occasional emotional outbursts
- General disinterest in life and unwillingness to be included in group activities
- Poorly controlled aggression and competitiveness in relationships

Psychosexual Health Indicators

We are sexual beings. Sexuality is complex. Sexual expression is likewise complex and at times challenging and confusing. Psychosexual health is a state of physical, emotional, mental, and social wellbeing, and not merely the absence of dysfunction.

POSITIVE

- A growing comfort with and acceptance of one's own sexuality and identity
- Honesty in acknowledging one's personal sexual history
- Able to discuss concerns in these areas with trusted formators or spiritual guides
- Able to both give and receive affection in appropriate ways that respect necessary boundaries
- Able to respect and be comfortable with people who appear to have a different sexual orientation or life experience
- Sufficiently at-home in one's own sexuality to be able to relate comfortably to other genders
- Having age-appropriate friendships and relationships
- Able to be alone and to enjoy one's own company as well as able to relate to others
- Having a healthy balance of work and relaxation, of hobbies or personal interest
- Regularly monitors oneself and submit one's functioning and behaviour to the evaluation of respected others
- Able to find appropriate ways to relax, and address stress and negative emotions
- Able to laugh long and generously at life, its challenges, and its failures

PROBLEMATIC

- Appearing to be a 'loner' and incapable of establishing sound, mature relationships, both professional and personal
- Unable or unwilling to work and to live within appropriate relational boundaries
- Abusing authority and power
- Putting down "others," effectively diminishing their worth
- Unable to accept and understand people of different cultures
- Use of pornography or alcohol and substance use, or other inappropriate dependency
- Engaging in sexist, homophobic, racist, ageist, clericalist, supremacist or any other derogatory language or behaviours
- A dominant desire to relate only to persons who are younger, or of the same gender

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