

The Customary of the Companions of St. Luke – OSB

Guidance for the Community and Its Members



September 2020

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The Customary of the Companions of St. Luke – OSB

Guidance for the Community and Its Members

I. Our Customary and Charism

1. Our Customary. The Constitution of the Companions of St. Luke (CSL) identifies the authorization for and nature of our Christian community. This Customary, in turn, articulates expected practices of our dynamic and dispersed community and its members that reflect our intent to abide by the broader principles included in the Constitution and to be responsive to changing needs. Supplemental details related to implementation of these expected practices are provided in Appendices 1-3 of this Customary.
2. Benedictine Spirituality and Vows. The CSL was formed to exemplify Benedictine spirituality and practices in a manner consistent with our times under the Rule of St. Benedict. We are committed to the rule's core tenet of *preferring nothing whatever to Christ*.
 - A. *Monastic Vows*. We are also committed to fulfilling our vows of stability, obedience, and conversatio morum suorum (fidelity to the monastic life). These vows have been defined by many monastics over the ages and reflect the spiritual journeys of those individuals and communities who have gone before us. We are called to embrace these vows as our own as we listen to God and one another with open hearts and minds and pursue a way of life often viewed as countercultural.
 - B. *Spiritual Practices*. The CSL charism, our mission, is and always has been a life devoted to Christ in constant prayer, in lectio divina (sacred reading), and in service.
 - i. The Opus Dei. Nothing is to be preferred to the work of God (Opus Dei), which includes prayer and, when possible, participation at the Eucharist. Vowed members are bound to the recitation of a four-fold daily office and oblates to a two-fold daily office (prayer service). As a dispersed community, the CSL has established an electronic application of the Opus Dei (www.benedictineprayers.org) that contains a complete set of daily offices. These are also available, for example, in the *Contemporary Office Book* published by TEC.

- ii. The Oratory. St. Benedict tells us that the oratory is set apart for prayer and nothing else is to be done there. Each member should try to set aside some quiet place for prayer and meditation.
- iii. Lectio Divina. This special type of sacred reading is inseparable from our personal prayer and meditation. Each member is expected to set aside ample time for both.
- iv. Service. Our ministries will take various forms as we are called to service in our local communities, but, in the spirit of our patron, St. Luke, we all bring healing through contemplative prayer and associated responses to a wounded world.

II. Membership

1. Categories of Membership. The CSL community consists of vowed members, oblates, and companion associates. These categories relate to different expectations regarding church affiliation, formation requirements, recitation of the daily office, and annual pledges. Overlaying the basic eligibility requirements is the expectation that all members are seekers of God and are called to be part of the CSL's Christian community.
 - A. *Vowed membership* is available for those candidates who are baptized or received as Episcopalians or Anglicans in communion with the See of Canterbury and are active in their parishes. The superior shall confer with the bishop visitor if persons apply for membership and are members in good standing with a church in communion with TEC, but not with the See of Canterbury, before processing their applications. Candidates must be able to attend CSL convocations and read, write, and speak English. They also: must be 21 years of age or older; are not under vows in another religious order or community, and; have been interviewed and have completed an application for vowed membership.
 - i. Subsequent stages to becoming a life-professed member start with postulancy, a period of at least one year for individuals to discern, with the help of a formation guide, if God is truly calling them to live under the Rule of Benedict as a vowed religious. This and other vowed stages and full oblation (see below) are earmarked by rites of passage as identified in *The Rituale for the Companions of St. Luke, OSB*.

- ii. The novitiate is the stage following postulancy and includes the assumption of a monastic habit and name at the beginning of this period of time of at least two-years. Its purpose is to build and strengthen the member's recognition of the religious vocation and to engender love for the monastic lifestyle and community. Formation guides assist members with deeper exploration of the religious experience and their intentions. Novices may, with the approval of their formation guide, petition the superior to take annual vows — or pursue other options (see below, Section II.5, Change in Member Status).
 - iii. Annually-professed members are those who provisionally renew their vows each year and engage in intense discernment and completion of a related project and study, generally for a three-year period. This discernment phase is supported by mentors and is to result in a decision about whether the annually-professed are to live the rest of their lives dedicated to God and to fulfilling their CSL monastic vows — or to proceed otherwise (see Section II.5 of this Customary).
 - iv. Taking solemn (life-professed) vows is the final and most important step for a CSL member who has been praying, studying, providing service, and developing deeper relationships with both God and community members — generally for at least a six-year period of time (from postulancy through taking final vows). After completing the required CSL formation expectations, gaining approval by the superior, and being ratified by life-professed members, solemn vows (intended for life) are taken as an expression of commitment to both God and to the CSL community. Life-long formation is expected to continue (see paragraph II.2.D below). In addition, life-professed members are expected to reaffirm their vows every five years after making life profession, with special notice taken every ten years on their jubilee anniversary.
- B. *Oblate members* are important to the expression of Benedictine religious life. They have a vocation defined by their own tradition and history and contribute, together with vowed members and companion associates, to the diversity and vitality of the CSL. Oblate membership is available for those baptized candidates who are members of any Christian church; are able to attend convocations and read, write, and speak English; are 21 years of age or older; do not hold dual membership with another community without permission of the CSL superior; and have completed an application for oblate membership after an initial interview.

- i. Upon acceptance, the candidate is received as a novice oblate, enters into a formation process for a minimum of two years, and receives support and supervision from the director of oblates.
- ii. Upon completion of the formation process and approval of the superior, the novice oblate has a formal reading of promises and is clothed and named as a full oblate. As for life-professed members, full oblates are to engage in life-long formation. They also are expected to reaffirm their promises every five years after making first promises, with special notice taken every ten years on their jubilee anniversary.

C. *Companion associates* are individuals who have chosen to associate themselves with the CSL to enrich their way of life. Those received as members of the CSL on or before June 2013 are still considered active. Otherwise, this membership category is closed.

2. Formation. As a dispersed community, the CSL's formation programs for both vowed and oblate members (identified in Section II.1) are distance-learning opportunities with set curricula. The program requirements are defined in formation manuals created for each type of membership and are provided, as applicable, to members who are supported by an assigned formation guide or approved mentor.

A. *True formation* is not an intellectual exercise; it is a spiritual process of growth and transformation. The formation programs are designed to help each person discern if the CSL's form of Benedictine life is truly God's call, and to transform one's concept of faith and response to that faith by living into the Rule of St. Benedict. Each program is an expression of our Benedictine vows and is a balance of prayer, study, and work.

B. *Daily prayer* by members is to begin each day and each activity. Members also are to practice *lectio divina* (sacred reading), read to explore and expand their faith and their understanding of the Rule and Benedictine spirituality, and report on what they have discovered, faithfully and in a timely manner.

C. *Rigorous formation* programs are key to growth. However, it is understood that as a dispersed community, with members living and working in the world, unanticipated events or situations may develop that will affect the ability of members to maintain the study schedules as described in their formation syllabus or plan. In dealing with a special circumstance, as applicable, the dean of formation and formation guides or the annual-vows administrator and mentors are

to work with members to develop a formation schedule beneficial to the formation process of the members and to advise the superior of the adjusted schedules.

D. *A lifelong process* of formation is essential for member transformation and the superior, the CSL Council, and the dean of formation shall make suitable provisions both for continuing formation for the community as a whole and for all members to grow in knowledge, service, and love of their respective vocations and of the community.

3. Member Precedence and Use of Initials. One way of acknowledging the relationship among CSL brother and sister monastics is to make note of how long a person has been a member. For example, the precedence or order in which members are seated for group prayer is ordinarily determined by their date of entrance as a member of the CSL and not by their age, gender, or other identifier. Another way of facilitating introductions is by the use of post-nominal initials on name tags or written signatures that relate to vocation and stage of formation. For vowed members: postulants follow their names with p/OSB, novices with n/OSB, and the professed with OSB. For oblates: novice oblates follow their names with nOBL/OSB and full oblates with Obl/OSB.

4. Monastic Habit. The habit is an outward and visible sign of our consecration to Christ in the monastic life and represents the yoke of Christ we have accepted. It is one way that the CSL brothers and sisters have to serve as witnesses to the larger world and to promote stability and solidarity within the community. The basic Benedictine habit consists of a tunic and scapular and is traditionally black in color. It is blessed at the time a member first receives it and is to be cared for and worn appropriately.

A. *The basic habit* is modified in various ways depending on vocation, gender, and stage of formation. Vowed members, except women who choose to wear a veil, wear a hooded scapular. Black belts are short for novices and long for the professed. A cuculla is a unique outer garment worn, only by those who choose to, as part of the Ceremony of Making Life Vows.

B *The oblate habit* for both men and women in full oblation consists of the tunic, without any white at the neck, a short black belt, and the scapular without a hood. Women oblates do not wear the veil.

C. *Some restrictions* apply to when the habit may be worn. All members are to wear their habits at CSL meetings. Vowed members, with their local clergy's

permission, also may wear them at their local churches or when doing ministry work but not when engaged in secular activities. Oblates, with both the superior's and their local clergy's permission, also may wear them for worship and ministry but not for secular work. Vowed and full oblate members may be buried in their habits. It is important to confirm that the symbolism of the habit is useful and edifying in a given circumstance and does not become an occasion for unnecessary strife.

- D. *Consistent with the symbolism* of the black monastic habit and expected behavior while wearing it, shoes and clothes beneath the habit should be black. Accessories and other things that draw undue attention to the person should be avoided.
5. Change in Member Status. Sometimes either by a strong call of the Holy Spirit or because of changes in a member's situation, a member may request or be required to make a change in membership status. One example of changed circumstance is a vowed member who is no longer an Episcopalian but who has the option of becoming an oblate member.
- A. *Vowed Life to Oblation or Vice Versa.* After petitioning the superior, having discussions, and receiving approval of the superior, a member may move from the vowed-life track to the oblation track – or vice versa. Based on the formation stage exited, the member will transition to an appropriate new stage of formation as detailed in procedures administered by the dean of formation.
- B. *Transfers from Other Religious Communities.* The CSL shall consider persons who are living as a religious in another community for membership provided certain conditions are met.
- i. Eligibility requirements for vowed membership include those identified in Section II.1.A of this Customary, together with additional required information, documentation, and interviews.
 - ii. Formation, naming, and clothing of the transferred member are dependent on the stage of spiritual formation achieved in the transferring community. For example, if the religious is in annual vows in the first community, the transferred member shall be received as a postulant and begin the postulant formation program identified in the CSL's formation manual, with assistance of an assigned formation guide. However, the novitiate program and the annual-vows process may be restructured and shortened at the

discretion of the superior after consultation with the dean of formation. The superior and dean of formation should be consulted for more specific details related to the process for members transferring from another religious community.

C. *Probation and Leave of Absence.* Specific behavior or personal circumstance may result in a suspension of regular membership status.

- i. Probation. All members are considered to be in good standing unless they have been put on probation by the superior due to serious infractions of the Rule of St. Benedict, the Constitution, this Customary, or other serious infractions that have disrupted the community. The superior is to consult with the CSL Council by appropriate means before imposing probation. A member can return to good standing after reconciliation with the community and removal of probation status by the superior, who has consulted with the CSL Council.
- ii. Leave of Absence. The superior may grant a leave of absence to any member of the community after conferring with the CSL Council. The petitioner's reasons for the request and any conditions placed on the petitioner are to be noted and kept on file. During the approved absence, that shall not exceed three years, the religious remains subject to the authority of the superior and to the obligations of promises or vows made for the duration of the leave of absence; and the religious shall not exercise any Chapter rights during the approved leave of absence.

D. *Separation and Secularization.* Despite best intentions at the beginning of a member's spiritual journey with the CSL, voluntary or involuntary reasons for separation from the community may emerge. Requirements for discharge are dependent on stated reasons and membership category.

- i. Postulant, Novice, Oblate, and Annually-Professed Member Separation. Members who discern that religious life with the CSL is not God's call for them may petition the superior for release from their promises or vows. The superior has the authority to dismiss or release a postulant, novice, oblate or novice oblate at any time after conferring with the CSL Council. Annually-professed members may be separated from the community provided they live under their vows until the year is complete, at which point the vows, not being renewed, are no longer binding. Otherwise, they may petition to be secularized as well as separated from the community if they

determine that continuing to live in accordance with their vows for the remainder of their term is impossible.

- ii. **Life-Professed Member Voluntary Separation.** Those members who have taken solemn (life) vows and no longer can be faithful to them may petition for separation from the community and for secularization. The gravity of this crisis means that the members must embark on a process of discernment of at least six months to discover whether the vocation with the CSL is beyond resuscitation or whether it can be healed. During this period, the member is to be placed on a leave of absence. Release from CSL membership is by the superior and release from the Benedictine vows is by the bishop visitor. If the separation is because of a desire to become a solitary or to transfer to another community, the member's vows will be held by the designated clergy. If the separation is because there is no desire for religious life, secularization procedures are available for the members. Specific responsibilities and process details are available in documents on file with the prior.
- iii. **Life-Professed Member Involuntary Separation.** A life-professed member may be dismissed upon recommendation of the superior and then secularized by the bishop visitor. Dismissal is to be resorted to only after other remedies have been pursued. Dismissal will be considered for seriously divisive, disruptive, or violent behavior exhibited at convocation or elsewhere. Such behavior may include abuse or disrespect of others, fiduciary misconduct, or conviction for a felony under civil law. Given the severity of this remedy, due process procedures and the right of appeals to the bishop visitor are available. If dismissal is decided, separation from the community is immediate after any appeals are resolved; the bishop visitor then shall initiate secularization. Note that special provisions exist for dismissal, if necessary, of the superior of the CSL. Specific details related to involuntary separation of both professed members and of the superior (see Section IV.2) are available in documents on file with the prior.

III. Community Leadership and Core Documents

1. **Official Leadership.** Leadership for the CSL is provided by elected and appointed brothers and sisters from within the community. The key positions of superior, prior, and deans (together with their terms of office), and of CSL councilmembers are identified in broad form in the CSL Constitution. The official

leadership and the community are dependent on engaged and supportive CSL members and also on guidance available in core and related documents.

A. *The Superior.* The CSL organization structure reflects the relatively unique nature of our Christian community in that it is collaborative and consensual while being spiritually guided and administratively led by the superior. The superior, an elected and unpaid CSL member called abbot or abbess, is assisted by appointed and elected unpaid members to provide inspiration and guidance for the community.

- i. Spiritual leadership by the superior includes interpretation of the Rule of St. Benedict and teaching by example. Mutually beneficial connections with TEC and other Christian or Benedictine communities, with assistance by the bishop visitor, are to be developed and maintained to ensure the CSL is a viable member of and witness for the 'body of Christ'. Within the community, the superior has a key role to fulfill in supporting the formation and growth of all its members – from initial contact with the community through their potentially life-long membership.
- ii. Administrative leadership by the superior includes facilitating a collective vision for the future of the community, appointing the prior and deans, fostering future leaders of the community, leading CSL Council meetings, approving decisions related to new and existing members, envisioning the direction of convocations (see Section IV.1), overseeing financial matters, and ensuring the availability of the CSL's core documents. Additional expectations of this position may occur as the community evolves.

B. *The Prior and Deans.* The superior is empowered, after consultation with the CSL Council, to distribute leadership and to share administration by choosing subordinate officers and allocating specific areas of responsibility to CSL brothers and sisters. These leadership positions (by members who are life-professed or annually-vowed) include, but are not limited to, a prior and deans of communications, finance, and formation.

- i. *The Prior.* The prior serves primarily as the deputy administrator for the community. The prior chairs CSL Council meetings in the absence of the superior, currently serves as the coordinator of the CSL semi-annual convocations, oversees availability and maintenance of administrative documents, and also contributes to member formation and other areas of responsibility as determined by the superior.

ii. Deans. The deans assist with the management of designated aspects of community life. They, in turn, may be assisted (as illustrated in the items below) by other members to fulfill the deans' areas of responsibility. To ensure continuity and availability of information, the deans are expected to facilitate the development and implementation of appropriate policies and procedures, program manuals, or other documents that provide guidance for the efficient and effective administration of the community.

- (1) Communications. This area of responsibility is diverse and dynamic, and is especially affected by changes in technology. The scope of responsibility includes: internet-based applications; conventional written information materials; and assistance with the mission of the superior, prior, and other deans. The dean may form a committee to assist with the development and management of communication applications and materials. The dean also currently represents the CSL as part of The National Association of Episcopal Christian Communities (NAECC). The range of communication vehicles is presented in Section V.3 of this Customary.
- (2) Finance. Management of the CSL's finances and service as the community's treasurer includes: preparation of annual budgets; oversight of annual audits or reviews; preparation of records and documents for legal authorities; receipt of pledges and legacies; and payment of expenses. The dean is to form a committee to assist with the management of investments and the development of financial policies, and, if necessary, to assist with hiring a business manager. Additional information is available in Section VI of this Customary.
- (3) Formation. Working with the superior, the dean is to develop formation programs and is to maintain and update formation manuals for vowed and oblate members as they grow spiritually, both as individuals and within the community (see Section II.2, Formation). The dean also is to provide oversight and support of assigned formation guides for members in their respective categories (see Section II.1, Categories of Membership).

C. *The CSL Council.* The Council consists of the superior, prior, deans, and four members elected at annual Chapter meetings by the community and ratified by the superior (see Section IV.1.A.ii below): one represents oblates;

one represents postulants and novices; and two represent annually-professed and life-professed members. The Council's main duties include: ratification of appointments by the superior; review of the annual budget; approval of unbudgeted expenditures and identified borrowings; and making recommendations to the superior related to human resource issues, certain violations of the Constitution or Customary, and proposed changes to the Customary. Minutes of the Council's meetings are to be kept and distributed to all members, in the spirit of full disclosure of business conducted. Any member who has an issue for consideration by the Council is invited to share that issue with any council-member.

2. CSL Core and Other Documents. Essential and supplementary documents of the CSL exist for study by postulants and novices and for reference by more senior members. These documents complement guidance by the CSL leadership and help to define how we are expected to live both as individuals and as a community.

A. *Core Documents.* The Rule of St. Benedict provides the underlying basis and framework for our community. Several publications of the Rule are available. See, for example, the booklist in the CSL formation manuals or the *Rule of St. Benedict* within the CSL's on-line *Opus Dei* application (referenced in Section I.2.B.i of this Customary). Translating the Rule into terms that speak to the existence and nature of our community is *The Constitution of the Companions of St. Luke – OSB*. This document is somewhat timeless and requires approval by professed members before any changes to it are made. Key information and guidance that flows from both the Rule and the Constitution and relates to expected practices of CSL members is provided by *The Customary of the Companions of St. Luke – OSB*. Changes that keep the document current and accurate are expected to be authorized and approved by the superior, in consultation with the CSL Council. Note that copies of the Constitution and Customary are included in all formation manuals and may also be obtained by contacting the superior; however, they may not be shared with non-members or other communities without approval of the superior.

B. *Other Documents.* Additional documents used primarily for administration of the community include various records and reports, procedures, and manuals prepared by the superior, prior, or deans (see Appendix 1 of this Customary). The superior, prior, or the deans of communications, finance, and formation are responsible for maintenance and distribution of the documents, as appropriate.

IV. Community Meetings and Elections

1. Convocations. As a dispersed Christian community, the CSL is especially dependent on its week-long spring and fall convocations for its members to meet face-to-face and as a group for spiritual sustenance, fellowship, and conducting essential business. These convocations, approved by the superior and coordinated by the prior, include participation by each of the members assembled. Details about travel, lodging, and scheduled events are provided before each gathering. All members are expected to attend these convocations unless given permission by the superior to be absent.
 - A. *Spring Convocations* are highlighted by praying the daily offices and celebrating the Eucharist. As part of these formal worship and service times, rites of passage for members reflective of their stage of monastic formation are honored by the community. These rites are identified in the *Rituale* referenced in Section II.1.A.i and in Appendix 1 of this Customary. These special formation milestones are also celebrated more informally, for example, during other times of fellowship and through CSL newsletters.
 - i. Shared meals and other opportunities for fellowship are complemented by periods of silence for personal meditation and study.
 - ii. Chapter business meetings generally are held at the end of the week during the spring convocation. Upon meeting the 51% quorum requirement, minutes of previous meetings and financial and other reports are approved by the membership before additional items are presented for discussion and resolution. Election of council representatives also generally occurs at the Chapter meeting while the timing of election of a new superior during convocation varies depending on availability of the bishop visitor.
 - B. *Fall Convocations* have a special appeal for many CSL members. Although highlighted by praying the daily offices and celebrating the Eucharist and member-formation milestones (as are spring convocations), fall convocations are more contemplative in nature and are less focused on conducting business. New members can often play a more visible role at these gatherings and mature members have more time to experiment with different spiritual practices and to lead discussion groups or be bathed in silence.
2. Election or Removal of a Superior. Election of a new superior generally occurs as part of Chapter meetings. Section IV of the CSL Constitution identifies member

voting rights and additional information about Chapter meetings and the election process is maintained by the prior. Both the election and removal of a superior are serious decisions and specific procedures apply that include oversight of the processes by the bishop visitor, sufficient notice given to voting members, and secured balloting provisions.

A. *Election of a Superior.* The bishop visitor will notify the community when a new superior is to be elected because of expiration of the five-year term of office of the current superior, because of death, or because of forced removal of the superior from office. All eligible and willing life-professed members over 35 years of age will be placed on the ballot. Absentee ballots may be submitted and all ballots are secret. Ballots are cast by eligible life-professed and annually-professed members until a decisive vote (consistent with the identified process) is announced by the bishop visitor. The community shall assemble in the oratory and the members in turn, following seniority, shall present themselves to the new superior for the superior's blessing.

B. *Removal of a Superior.* The removal of the superior is a serious decision that may have important consequences for the whole community. Therefore, the process should only be begun for the most grievous offenses. These include: a pattern of behavior not in accordance with the Rule of Benedict; violation of the canons and constitution of TEC and the CSL; neglect of the duties of the office of superior; misuse of community finances and monies; sexual harassment and/or inappropriate sexual behavior; and abuse of the authority of the office of superior (see Appendix 2, Safe Church Policy definitions of various forms of abuse). Based on a substantiated complaint and action by the bishop visitor, a two-thirds majority vote of the CSL Council, and a concurring Chapter vote by a three-quarters majority, the superior shall be removed from office.

V. Relationships and Communications

1. Clergy Support. The CSL, although independent of any other Christian or religious community, is not an isolated entity and is very much connected to TEC and to the larger world (see CSL Constitution, Section I). For example, all CSL vowed members are expected to be active members in their local Episcopal or Anglican churches. In addition, the CSL relies on clergy support provided by both a bishop visitor and a chaplain as referenced in the CSL Constitution, Section V.1.

A. *The Bishop Visitor.* The bishop visitor, elected by a two-thirds majority vote of the Chapter on the motion of the superior, serves for at least a five-year term as

an essential bridge between the CSL and the greater church and as the ultimate guardian of the community. As required by TEC, the bishop visitor is to visit the CSL at least once every two years. During the visit, private interviews are conducted and an address to the community at large is delivered. The bishop visitor is expected to provide ongoing spiritual guidance to the superior and to oversee the election and removal of the superior, as necessary. Member formation responsibilities include being informed of all professions to solemn vows and ratifying any petitions for secularization or release from solemn vows. Additionally, the bishop visitor is to receive and hear appeals from members without hindrance from the superior, but is to make relevant decisions only after consultation with the superior and the CSL Council. Additional administrative duties include the approval of any changes to the CSL's Constitution.

B. *The Chaplain.* Unlike the bishop visitor position, which is required by TEC, the position of chaplain is one authorized and contracted by the superior on behalf of the community. This appointment is to be held by a non-member priest. The chaplain's responsibilities include visiting the community during convocations and meeting in confidence with any member who wishes to do so. The chaplain also serves as celebrant for the Holy Eucharist and shall participate in Benedictine rites if the bishop visitor is unavailable.

2. Safe Religious Community. An example of a CSL policy that reflects the community's witness and dual presence in the larger world and among Christian communities is the Safe Community Policy (see Appendix 2). This policy is not only required by TEC (see Constitution Section V.2) but is necessary for the well-being of the CSL. It reinforces the Christian value of respecting the rights and dignity of all of God's children. The minimum expectation is that abuse, be it sexual, emotional, or physical of any other person of whatever age, and member of the community or not, will not be tolerated and must be reported to the superior. All members are expected to read and become familiar with this policy (distributed to all members) and to complete required training. Members are also expected to be familiar with and to be in full compliance with the safe church policy of their home churches. A professed member, appointed by the superior, oversees the required training, maintains records, and facilitates implementation of the policy.
3. Communication Tools. Effective communications are especially challenging in today's global and mobile society. For the CSL to thrive and meet the needs of both the community and our dispersed brothers and sisters, it is essential that all contribute, regardless of their personality type, perceived talents, or local obligations. The superior, CSL Council, prior, and deans are available to support and

facilitate the transfer of information and the exchange of ideas. Both in-person and technology-based communication vehicles are to be maintained and to be made available for the community.

- A. *In-Person Communications*. Options that exist to promote face-to-face interactions and mutual relationships include: CSL spring and fall convocations (see Section IV.1 of this Customary); regional member gatherings or retreats approved by the superior and the Council; and representation of the CSL by superior-appointed members at annual NAECC meetings.
- B. *Technology-Based Communications*. More extensive and technology-based options exist for remaining connected with others and nurturing the spiritual well-being and diverse ministries of CSL's membership. These include: our customized internet-based *Opus Dei* prayer and study application that allows CSL members to pray and study together 'in spirit'; our web site (www.csl-osb.org); an audio-video conferencing tool; group email services; a social media presence; and more conventional vehicles such as a newsletter, printed brochures, and use of phones and posted mail.

VI. Financial Resources and Stewardship

1. Community Finances and Reporting. The CSL is guided by the principles of simplicity and hospitality and of balance and moderation expressed in the Rule of St. Benedict. As a dispersed Christian community, the CSL is accountable not only under the canons of TEC but is also accountable to various governmental regulations and authorities in the United States (see Appendix 3). These include the necessity for our community to be incorporated as a nonprofit entity and to be appropriately recognized by the Internal Revenue Service. It is the responsibility of the CSL leadership, especially the superior and dean of finance (see Section III of this Customary), to ensure sufficient monies are available to cover operational expenses, to invest wisely any tangible assets the community owns, and to timely report to the applicable authorities, as required. In the event of dissolution of the CSL, the assets and property not personally held are to be administered by the Council, as described in the Articles of Incorporation of the CSL, on file in Chicago, Illinois.
2. Personal Pledges and Legacies. All CSL members contribute in various ways to the viability of the community, and in turn receive both tangible and intangible benefits of membership.

- A. *Membership Benefits.* Benefits of membership include: spiritual support through formation programs and guidance; availability of semi-annual convocations, with community-provided lodging and some assistance with travel; access to an array of communication tools (see Customary Section V.3); and opportunities to develop nurturing relationships with fellow Benedictines and spiritual seekers.
- B. *Member Contributions.* Members contribute to the community and to their own development in ways that reflect their talents and circumstances. Some minimum expectations include: daily prayers and study; serving as faithful representatives of the CSL within their local churches and the larger world; actively participating in CSL convocations and available work groups; and contributing financial resources in the form of delivering on their pledges and promised legacies.
- i. *Pledges.* Annual member pledges are not considered as membership dues, but as thank-offerings for God's generosity in bringing us together as part of the CSL community. All members are expected to offer a pledge of financial support to the community based on their personal and family financial situations. Guidelines for pledged amounts are available from the superior. Each member is to submit a pledge card to the dean of finance at the beginning of each fiscal year, effective July 1, indicating the level of planned giving. These pledges are essential for budgeting and payment of expenses. Note that members are obliged to meet their own individual financial responsibilities, including payment of taxes and personal insurance premiums.
 - ii. *Legacies.* By the time of solemn (life) profession or making a long-term commitment as an oblate, it is hoped that members will be thoroughly inculcated with a spirit of simplicity and generosity that can and will discern those things essential for a life-style that lends itself to hospitality to all and care for the environment we share with all of God's creation. This is consistent with traditional expectations of Benedictines and with the implicit renouncing of all possessions and behavior that prevent full knowledge of God. Upon reflection, members are encouraged to express their intent (by providing a signed copy to the superior) to leave any legacies, stipends, trusts, endowments, or other gifts to their CSL spiritual home and community. The superior and the CSL Council shall seek competent legal advice on how best to invest and protect such gifts that, however defined, shall be considered as free-will gifts and not as property that is retractable or is to be treated like a personal investment.

Appendices

Appendix 1 -- Summary of Administrative Documents

Documentation of processes and maintenance of records that implement the guidance provided by the CSL's Constitution and Customary is necessary to ensure continuity and effectiveness from one administration to the next.

A. *Information routinely distributed to members* is listed below. The items are distributed under the authority of the superior but either the superior, prior, or applicable dean may be contacted about these items.

- Annual Budgets and Income and Expense Reports
- Convocation Registration and Schedule Details
- Formation Manuals by Member Category
- Minutes of Council Meetings
- Membership Directory
- Notification of *Opus Dei* Application Changes
- Safe Community Policy and Procedures

B. *Information related to the internal operation of specific offices* is outlined below. The extent and nature of information continues to evolve and to reflect on-going organizational changes. Questions or requests for information about specific areas or processes should be directed to the superior who will follow-up with either the prior or applicable dean.

- Communications
 - > Community Historical Records
 - > Convocation Materials, including: Psalter; Special Services information such as the Rituale; Supplies Inventory; Convocation Planning Manual; and Election Guidelines
 - > Copyright Approvals
 - > Electronic Resources, including: Website and *Opus Dei* Maintenance and Updates; Social Media, Group Email Services, and Audio-Video Conferencing Guidelines
 - > Guidelines for Committee Work
 - > Memberships and Contacts related to: TEC; NAECC; Clergy; and Financial Reporting and Reviews
- Finance
 - > Annual Budgeting and Cash Flow Records
 - > Church, State, and Federal Required Reports
 - > Gifts and Bequests Plans and Processes
 - > Guidelines for Committee Work
 - > Investment Plans and Processes
- Formation
 - > Manuals for Formation Guides and Mentors
 - > Member Status and Development Records
 - > Monastic Habit Procurement
 - > Processes Related to Inquirers
 - > Safe Church Training Records
 - > Supplementary Information for Member Formation Manuals

Appendix 2 – Safe Community Policy and Procedures

The Episcopal community of the Companions of St. Luke (CSL) is committed to being a safe and respectful community. This policy and related procedures are based on the principles published by the Episcopal Church (TEC) and the Rule of St. Benedict.[†] The welfare of all persons is of primary concern:

- All persons, whatever their age, culture, disability, gender, language, racial origin, socio-economic status, religious belief, and/or sexual identity have the right to be safeguarded from abuse.
- It is everyone's responsibility to report any concerns about harassment or abuse to the superior or prior, and it is the responsibility of the CSL leadership to conduct a full investigation.
- All incidents of alleged poor practice, misconduct, and abuse will be taken seriously and responded to swiftly and appropriately.
- All personal data will be processed in accordance with the requirements described within this policy and the Data Protection Act 1998. (*From the Episcopal Church policy on abuse – 2018*).

[†] St. Benedict uses individual instruction, excommunication within the community, and finally separation from the community to deal with behaviors that are harmful to individuals or the community. As the primary rule of life for members of the CSL, the Rule of St. Benedict as it relates to the treatment of each person complements the standards established by TEC.

A. *Policy Statement.* The CSL[†] recognizes that all people regardless of age, disability, gender, race, religious beliefs, or sexual orientation have an equal right to protection from all types of harm or abuse^{††} and is committed to safeguarding the welfare of all members.

[†] Best practice is that safeguarding duties extend to whole organization policies, values, and ethos and include all staff. It is better to be broad in scope as a provider in order to ensure a safer environment. (*From the Episcopal Church policy on abuse – 2018*).

^{††} Definitions:

Recognition of Abuse or Neglect: Abuse and neglect are forms of maltreatment of a member through a variety of actions, inadequate policies, procedures, and failures to act.

Physical Abuse: May involve hitting, shaking, throwing, poisoning, burning or scalding, drowning, suffocating, or otherwise causing physical harm to a member or anyone else.

Psychological Abuse: Includes bullying, emotional abuse, threats, humiliation, intimidation, coercion, and verbal harassment.

Sexual Abuse: Sexual abuse involves forcing or enticing a person to take part in sexual activities, whether or not the person is aware of what is happening. The activities may involve non-consensual or unwanted physical contact, including penetrative or non-penetrative acts. They may include non-contact activities, such as involving people in looking at, or in the production of, sexual online images, watching sexual activities, or encouraging people to behave in sexually inappropriate ways. If an intimate relationship develops between a person of authority and another member, the person of authority must resign from the position of authority.

Discrimination: Discrimination based on race, gender, sexual orientation, age, or disability is prohibited and is considered abuse. Comments or language either verbal or electronic that include racist, sexist, and other forms of derogatory communications about all persons will be considered as harassment.

Inhibited or Being Inhibited: Is used to limit communication between a member and the community. For the purposes of this policy, it is imposed on a member by the superior to protect the accused and the accuser from verbal or electronic communications that could be hurtful or harassing and to prevent extraneous communications that could cloud or confuse the investigative process.

B. *Background Checks and Safe Church Training*

- i. Candidates for vowed life and oblation must have a background check done before being received into the community. This report is the final step before being received. The new member will receive instructions on initiating the background check. The cost of the background check is borne by the candidate.

ii. After being received into the CSL community, all members, on an on-going basis, are expected to contribute to maintaining CSL compliance with TEC requirements related to safe and respectful religious communities and to manifest Benedictine principles related to hospitality and avoiding potentially harmful behaviors (with their associated negative consequences). A minimum expectation is that all members residing in the United States or residing in other countries must complete the on-line Safe Church Training course offered by the CSL and to be regularly re-certified.

To meet this expectation, members are to:

- (1) Contact the CSL Safe Church Coordinator for registration information and note that the cost is borne by the CSL;
- (2) Advise the CSL Safe Church Coordinator that they have completed the on-line training program; and
- (3) Be aware that even if a CSL member has completed Safe Church Training through their home parish or diocese, that member must complete the on-line Safe Church Training through the CSL.

To ensure compliance with this expectation, the superior is to:

- (4) Advise new members when they have to complete the program and to advise the CSL community when the certification/recertification period begins as well as its duration;
- (5) Respond (together with the Council) to any notification by the Safe Church Coordinator that a member has failed to comply with the training requirement -- by providing necessary assistance or taking appropriate disciplinary action; and
- (6) Confirm, together with the Council and any investigative body, whether or not the member has completed the required CSL Safe Church training (by contacting the safe church provider, Presidium) for purposes of investigation and resolution of a complaint of abuse filed against the member (see Section C below).

C. *Reporting and Processing an Alleged Incident of Abuse.* If members feel that they have been subjected to physical, psychological, sexual, or discriminatory abuse (as defined above), by another member of the CSL, the member is to notify the superior of the event in writing providing specific information including a description of the event, where or how the event occurred (i.e., in person or within a group, via email, telephonically, Facebook, etc.), date and time, and other pertinent information. In the event the abuse is alleged to be against the superior, it must be reported to the prior. Alleged incidents by a CSL member occurring in a church, diocese, or other locations are generally communicated to the superior by authorities.

i. Initiating an investigation of a member accused of abuse

- (1) When a written report alleging abuse is received, the superior after consultation with the CSL Council will decide if police involvement is necessary and act accordingly. The alleged abuser is to be put on leave of absence by the superior or prior after consultation with the CSL Council. The superior shall initiate an investigation (as described below) of the charge. The member shall be inhibited from communicating with the accuser and members of the community except the superior and/or the superior's designate. Pastoral care will be extended to both the accuser and the accused; opportunity for outside pastoral care will be made available. The accused cannot attend Convocations. If the member breaks the inhibition, the member shall be immediately separated from the community.
- (2) If the superior is accused of abuse, the prior after consultation with the CSL Council will decide if police involvement is necessary and act accordingly. The prior shall initiate an investigation of the charge; the superior will take a leave of absence and be inhibited from communicating with the accuser and members of the community. The CSL Council shall appoint a guardian for the community. Pastoral care will be extended to both the accuser and the superior. If the superior breaks the inhibition, the superior shall be immediately separated from the community.
- (3) If an accusation of abuse is reported to the superior or prior against a member of the CSL from a church, diocese, or civil authority, the investigation of the charge is carried out by that entity and the superior or prior is to confirm that police have been notified. The CSL leadership shall determine the response of the community upon receiving a report, including the outcome from the church, diocese, or civil authority.

ii. Investigative process

- (1) The investigative process is to be initiated within 10 days of the receipt of the written allegation. The investigation shall be completed within 45 days following the receipt of the written allegation by the investigator(s). Additional time may be granted by the CSL Council upon request. The superior/guardian after consulting with the Council may appoint a committee led by a senior member, or hire an outside investigator to investigate the charge. If an outside party is to be involved, the Council must recommend and approve a budget to cover this person's work.
- (2) The internal investigation shall include in-person or Zoom interviews with the accuser, the accused, and any third party witnesses or persons named as part of the complaint. (No email communications). The investigation shall also include reviewing relevant emails between the parties, relevant Facebook posts, and/or other media content.
- (3) All meetings of the superior, the superior's designate (including the outside investigator), or the guardian with the CSL Council about this matter are to be done in closed (non-public) sessions; therefore, all minutes, relevant emails and records, and recommended outcomes of the investigation are to be closed. Informal discussions by any CSL member, including the superior or guardian, and the CSL Council with the accused that include, but are not limited to, individual impressions, advice, and the direction of the investigation are prohibited.

iii. Results of the investigation

- (1) **Member:** A report of the investigation discussing the merits of the accusation shall be prepared for the superior and the CSL Council. The report shall include recommended actions concerning the accused member. However, if outside investigators are involved, their report shall only include the findings of the investigation. The superior and the Council shall determine the outcome and action. The action shall be one of the following
 - **Exoneration.** The accusation is minor or without merit. A recommendation is presented that the member is to be restored as a member in good standing. The committee may also recommend mediation and support for the accuser and/or the accused.
 - **The accusation is confirmed and has merit; but, it does not rise to the level of separation.** A recommendation is presented that if the accused accepts responsibility and is open to mediation by a third party as a step towards reconciliation, the member moves from leave of absence status to probation status. The duration of probation is determined by the superior and the CSL Council. If the member does not accept responsibility or mediation, this will result in immediate separation from the community. If another written allegation of the offense is received and confirmed by investigation, the member will be immediately separated from the community.
 - **The offense is serious and confirmed.** A recommendation is presented that the member is to be separated from the community.

The superior and the CSL Council shall take the report and recommendation under advisement. The Council shall vote to recommend the report and outcome to the superior, or they may recommend the report to the superior but with a different outcome.

- (2) **If the Superior** is the accused, a report of the investigation discussing the merits of the accusation shall be prepared for the CSL Council by the guardian or the investigative committee. However, if outside investigators are involved, their report shall only include the findings of the investigation. The guardian and the Council shall determine the outcome and action. The recommended action shall be one of the following:
 - **Exoneration.** The accusation is minor or without merit. A recommendation is presented that the member is to be restored as a member in good standing and resumes active duty as the superior of the community.
 - **The accusation is confirmed and has merit; but, does not rise to the level of separation.** A recommendation is presented that if the accused accepts responsibility and is open to mediation by a third party

as a step towards reconciliation, the member is to resign as superior and moves from leave of absence status to probation status. The duration of probation is determined by the guardian and the CSL Council. If the superior does not accept responsibility or mediation, this will result in separation from the community. If another written allegation of the offense is received against the superior and is confirmed by investigation, the superior will be immediately separated from the community.

- **The offense is serious and confirmed.** A recommendation is presented that the member is to resign as superior and is to be separated from the community.

The guardian and the CSL Council shall take the report and recommendation under advisement and the Council shall vote to recommend the report and outcome to the guardian, or they may recommend the report to the guardian but with a different outcome.

iv. Notifications. The bishop visitor has no role in the process unless the accused files an appeal. The superior or guardian is to advise the bishop visitor of the situation and the decision. Both the accuser and the accused shall be notified by the superior or guardian within 48 hours after the CSL Council meeting. If the decision is that the accusation has merit, the member has to decide if (s)he accepts probation and mediation. If mediation is a part of the decision, the member will be advised how the mediation is to work.

v. Right of appeal. The accused has the right to appeal the decision of the superior/ guardian to the bishop visitor. The accused is to email the superior or guardian that the decision is to be appealed. The superior or guardian advises the bishop visitor of the possible appeal and sends the bishop visitor pertinent records of the investigation upon request. The accused must write the bishop visitor requesting the appeal within 10 days of receiving the notification of the decision of the superior/guardian. The bishop visitor acknowledges the request and advises the appellant what information is needed and schedules in-person or Zoom meeting(s) with the appellant. The bishop visitor shall advise the superior or guardian and the appellant about the decision of the appeal in writing within seven days. The superior or guardian will advise the Council of the bishop visitor's decision. The superior or guardian and the Council will discuss and respond to the bishop visitor's decision:

- If the bishop visitor affirms the superior/guardian's decision, the action previously approved by them shall be implemented.
- If the bishop visitor determines that the response to the accusation is inappropriate, the superior/ guardian and the Council shall reevaluate the response and any recommendations from the bishop visitor.
- If the bishop visitor determines that the response to the accusation is wrong, the superior/ guardian and the Council shall review the bishop visitor's report and either decide to initiate a new investigation or exonerate the accused.

Appendix 3 – Church, State, and Federal Reporting Requirements

The CSL, as an independent Christian community, is recognized as such by the Committee for Religious Orders and Communities of TEC. We are not connected nor affiliated with any Episcopal diocese. Therefore, we have unique reporting requirements that are not usually associated with church organizations. This Appendix lists the church, state, and federal reporting requirements to maintain our legal status

A. *Episcopal Church Reporting.*

- i. Annually, the CSL is to complete the *Annual Communities/Orders* form. This form is e-mailed to the superior in January and is to be submitted to the Committee on Religious Orders and Communities by March 1.
- ii. Annually, the CSL should review its listing in the Episcopal Church's 'Red Book.'
- iii. Bi-annually, we are to update our listing in *The Anglican Communities Year Book*. The publisher in the United Kingdom will send us a copy of the current listing for us to review and edit. The updated copy is to be submitted by March 1.
- iv. The CSL is expected by the Committee for Religious Orders and Communities of TEC to have a financial review by a third party by the end of our fiscal year. Our fiscal year begins July 1, so this review will be completed during Q1 of the new fiscal year. The report will be distributed to the community and to the bishop visitor.

B. *State Corporation Registration.* We are registered as a non-profit corporation in the state of Illinois. To maintain this status we must:

- i. Identify a person who is a resident of Illinois to be a contact person for mail from the Secretary of State's office; and
- ii. Complete the annual corporation registration form and submit it to the secretary of state's office before July 1 with a check to cover the registration fee. The form is available on the internet and can be completed by the dean of finance (treasurer) and signed by the superior

C. *Federal Internal Revenue Service.* We are registered as a 501 c.3 tax-exempt non-profit religious organization. To maintain this status, we must complete IRS form 990 (or EZ990 or equivalent e-form) and submit it to the IRS before May 15 each year. The form is available on the internet and can be completed by the dean of finance (treasurer) and signed by the superior.