

# Conference Report

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## Colloquium on the Carta Caritatis, Dallas, July 17–19, 2019

The Abbots General of both orders, several abbots and abbesses, many formators and superiors, young monks and nuns assembled for three days (July 17–19, 2019) at the Abbey of Our Lady of Dallas in Irving, Texas, to study, reflect on and discuss the Cistercian Order’s foundational document and celebrate the 900th anniversary of its approbation by Pope Calixt II. In sum, there were 29 Guests and 24 Dallas monks present, hailing from 18 monasteries and 12 countries on three continents.

Fr. **Stephen Gregg** (Our Lady of Dallas Abbey) gave the first presentation. His talk on the origins, content, and development of the Carta Caritatis (hereafter abbreviated as “CC”) began in a humorous manner by superimposing a map of Texas onto the familiar geography of Burgundy and, in another case, Western Europe, in order to show how places and distances from the beginnings of the Order compared to where the conference was being held. This visual reference relativized the distances traveled in the service of administering the Order in various eras.

In an often intriguing manner, Gregg approached the notion of the Order, its identity and administration by spanning topics such as the Divine Comedy, Perfectae Caritatis, and John Paul II’s speech to representatives of the Cistercian Family in 1998, in which the Pontiff expressed his approval that this Family is today “returning today to its original inspiration, after nine centuries of a continuous but not always trouble-free history.”

Gregg reminded the participants that the Cistercian Order is named after a place, not a founder or a theological mystery, also not after a biblical or spiritual topos like Carmel. Originally, even this place name Cîteaux did not mean for the founders anything besides a relatively random geographical place identifier. That place was then elevated the stats of a norm.

Coming as it did at the beginning of the conference, Fr. Stephen’s presentation also served as an introduction to important originary dates, making it clear that the three founding Abbots Robert, Alberic and Stephen could not have shaped

the CC in its entirety, which Gregg (citing Waddell) dated as being completed in 1147 under Raynard, the fifth abbot. 1147 is, it might be added, a particularly eventful year, since the congregation of Savigny was incorporated that year, with monks from a non-Cistercian background.

The Speaker noted that the CC is a substantial extension of the monastic legislation found in the Rule of St. Benedict; therefore the question of following RB according to the letter will always be, to some degree, an ambiguous undertaking. The CC itself documents certain divergence from RB, such as in the election of abbots and the frequent travel among the monasteries, to name just two examples.

Citing Raynard's *Super Cartam Caritatis*, Gregg notes that Cistercians strive for mutual peace in a network of abbeys in order to "take precaution against future shipwreck". Waddell has explained that the often-cited goal of being "indissolubly knit" echoes the terms in which the Bible describes the friendship between David and Jonathan (1 Samuel 18). Abbeys are (also) to be places of healing, an attractive alternative to living anywhere else.

The lecture ended with a detailed reflection on the famous passage *una caritate, una regula, similibusque vivamus moribus*. In many respects, the word *similibusque* has received more attention in the history of CC analysis than have the seemingly more central terms of charity, rule and usages.

The next presentation was given by **Ralf Lützelshwab** (Freie Universität Berlin), his topic being the connection between the General Chapters and the CC. The charter's seventh and eighth chapters are devoted to the General Chapter. To define the prestige of the Chapter, the speaker cited Caesarius of Heisterbach liber 7,20 on the ladder reaching from the General Chapter up into heaven with resplendent rungs; this is a clear reference to Jacob's ladder (Gen 28,12).

The CC and memoria, said Lützelshwab, are two measures by which the Order seeks to define its identity. While RB does not give directives about holding a chapter meeting in the later Cistercian sense of a General Chapter, RB 3 does define a similar institution for individual monasteries. Here the Benedictine abbot remains the master of all decisions and is not bound to the chapter's votes; indeed, RB makes no mention of voting at all. But if we recall that the General Chapter began as the conventual chapter in the motherhouse, the reference to RB 3 becomes quite central.

Other reform orders had opened up legislative possibilities for the Cistercians. Cluny, Gorze, Camaldoli, Vallombrosa and the Carthusians, among others, had much in common with Cîteaux. A particularly tangible similarity exists between Vallombrosa and Cîteaux: the speaker mentioned that several passages in their respective constitutions could even be considered as identical. In addition, other monastic rules like Pachomius' could well have been known in Cîteaux.

CC is far more than a legal document; *salus animarum* is its primary content, namely the salvation of the abbots' souls themselves, which is of course contingent upon having helped save the souls of the monks and laity entrusted unto them.

The supreme authority of the General Chapter grew quickly, as the CC continued to develop as a legal document. But not everything could be handled in chapter; scandals and particularly complicated disagreements were solved in the Order's highest judicial court, "the abbot of Cîteaux and his counsel" (CC2 3,16), who have the final word. Four abbots, the *pars sanior*, made up by abbots who were particularly adept, not because of their institutional affiliations. Lützelshwab also addressed detailed questions like reasons for missing chapter and proxies vs. messengers. How much coming and going was allowed around Cîteaux during the time the chapter was in session? Comparing the different solutions found for these problems over time helps to understand how the CC developed.

Lützelshwab concluded that the CC is a dynamic text that developed over half a century, prompted to evolve through the General Chapter, which was itself a flexible institution aiming to serve the needs of the Order in charity and solidarity.

Small group discussions followed, guided by questions that can be found at the end of this report.

The afternoon began with a talk given by Father **Alcuin Schachenmayr** (Heiligenkreuz), the author of this conference report. Rather than analyzing its legislative character, Schachenmayr approached the Carta Caritatis as an icon or trademark of the Cistercian Order. Its reputation was always a source of pride among Cistercians, even if its content was not known to all. It has been used as a way of dating the Order's foundation in 1119 (1098 is, however, more popular as the *terminus post quem*, since that makes the Order more ancient). In the abbreviated, iconic sense, the Carta is often regarded as the "product" of St. Ste-

phen Harding's work as "author", even if these categories are anachronistic and misleading.

Hagiography and reception history throw a different light on St. Stephen. Whether or not considered the sole author of the Carta, he was rarely venerated in the Middle Ages. After the Council of Trent, however, his profile grew stronger and stronger, not least because he was included in the Roman Martyrology (1586/9), where he was listed in eighth place on 17 April. The General Chapter "canonized" him in 1623 and for the course of the next century repeatedly encouraged his veneration. While he was often called the author of the Carta in this later period, he was seldom represented as a great legal scholar. Instead, Early Modern veneration for Stephen focused on altogether different character traits: his Marian devotions, his apostolic poverty, and his perseverance until the arrival of Bernard made the waning Cistercian movement a widespread success.

At the end of Schachenmayr's lecture, he placed John Dalgairns' 1844 monograph on Stephen into the center of attention. This widely-distributed book shaped the profile of the saint in the popular imagination over generations and remains surprisingly influential in our day. Amidst the romantic fervor of the Oxford Movement, the young convert Dalgairns portrayed Stephen as a gifted monk and abbot, clearly stating that he was the "author" of the Carta. Dalgairns was particularly keen on understanding Harding as an Englishman, perhaps forgetting that the monk never returned to his home country after leaving it as a young man.

More recent historical research has enriched our knowledge of Abbot Stephen, moving beyond the schematic picture of him as the third abbot of Cîteaux and the Order's lone legislator. Currently we emphasize his work on the breviary, on the hymnal, in the scriptorium and in consultation with Jewish scholars in a remarkably "modern" initiative of biblical scholarship. Furthermore, there is the large question of Stephen's care for his spiritual son, St. Bernard. In any case, since the Carta continued to grow after Stephen's death, it would be overly simplistic to call him its author.

**Elizabeth Freeman** (University of Tasmania) spoke about nuns and the organization of the Order. Women's abbeys were long considered marginal by the central governing institutions of the Cistercian Order. It took until the 18th century for the General Chapter to commission Etienne Viennot to compile a catalogue of women's monasteries. This man, whom Louis Lekai called "an Un-

known French Janaushek of the eighteenth century in *ACi* 33 (1977) 177–190, registered abbeys from ten different sources, but since then many others have become known. Registers are always prone to complexity, ambiguity, and ambivalence.

Regarding governance and visitation, Freeman noted that General Chapters for nuns were known at Tart (1268–1302), St.-Antoine-de-Champs (1208) and Las Huelgas (1390–1406). Some of their minutes survive. They were written in French, not Latin. Abbesses served as visitators. Citing Anne Lester, Freeman concludes that “very few texts shed light on the juridical connections between male and female houses.” Brigitte Degler Spengler’s work (e.g. “Hidden Springs” [1995]) is, according to Freeman, the best body of research for understanding the ambiguities of nuns’ incorporation in the Cistercian Movement.

She concluded by noting the “meaningful silences” that researchers encounter in the field of Cistercian nuns, like Esholt Priory near Leeds in 1485, which is mentioned in Canivez’s Statutes only once, though it existed more than 350 years. Another example would be Flines, where in one manuscript we have evidence of monks and nuns working on the same property.

The series of plenary lectures reached its peak with Abbot General **Mauro Lepori**, O.Cist., who spoke about the “Carta as a Source of Enduring Teaching”. The Carta is a gift to the Church, an echo, as it were, of Jesus’ prayer to the Father “That all may be one.” Our understanding of charity must be rooted in the Trinity’s communion of love. Our founders were moved at first by wanting to transmit Christ and that humanity might experience divinization in community thanks to the mercy of the Father. These legislative texts are addressed to us personally; they know what we need in order to live our vocation and our mission. They demand a response, and a responsibility. These ancient texts are more up to date than we are, and they mirror the infinite reality of what stands behind that which appears to our eyes as a fragile institution. Within this institution there is a positive and proactive force at work, yet it will always be in danger of infidelity and betrayal. Yet even if we have strayed, by returning in humility we can discover – and rediscover – the merciful and omnipotent force of the Father.

Authority in the Order is, claimed Lepori, the continuation of Christ’s serving ministry on earth, a burden that is light. Superiors must serve as Christ and desire to fall in love with souls Christ that has redeemed. The Abbot General made

reference to passages in CC that are clear references to the Gospel's good shepherd and merciful father. How do we find capable superiors, who are supposedly so rare? The CC says that precisely here the Rule and Order forms the abbot, so that he may be the shepherd that serves, guides, and leads to eternal life. The CC is, thus, a manual for correcting and forming superiors.

As we seek the charisma of the Cistercian way of life, the abbot noted a certain confusion about where or in whom it is to be found. Who transmits it? Today we have discovered that some of those called "founders" of orders and congregations have in fact betrayed the trust of the church. The CC can be ointment on the wounds that resulted, reminding us that we have been promised the grace to serve together without needing to be the center of attention. Many orders go into crisis upon the death of a founder, their successors then practice a type of "charismatic archaeology" in order to re-connect to sources, as though previously grace had been received from just one personal source. This is a fundamental misunderstanding of truly ecclesial charisms, which are always a gift to the church, here and now.

The CC is to be understood as a manual of formation for superiors, and there can be no formation without reference to tradition, which is an experience of life, not just rules and observances. Trying to imitate the daily behavior of monks and nuns in the 12th century is not enough. Today, it may be true that a common liturgical language is unthinkable, but it is easier than ever to translate texts and find ways of silence in order to make a uniformity of a truly high quality possible.

A panel discussion followed, in which four superiors (two from each observance) spoke about the challenges and strengths of the O.Cist. and OCSO today. Abbot **Peter Verhalen** (Dallas) explained the Common Observance's legislative bodies (General Chapter and Synod), the office and duties of the Abbot General, his collaborators and the structures implemented to lead the order. Prioress **Christiane Hansen** (Helfta) followed, introducing the O.Cist. congregations which include male and female abbeys. In total there are today 754 women and 1612 men in the Common Observance. All congregations are led by abbots, with the exception of the Castilian Congregation, Abbot General Maurus Esteva having secured permission from the Holy See that they have an abbess as abbot. How geographically diverse a congregation can be is shown by the example of Mehrerau, which has houses in Europe and the USA, but even more by the Lérins Congregation, which has houses in Europe, America,

and Vietnam. Add to that the transfers from one congregation to another: The Cistercian nuns in Bolivia were founded by German abbeys, yet recently transferred to the Castilian Congregation. Such moves occur for primarily cultural and linguistic reasons.

In a second, more reflective part of her talk, Hansen went on to discuss the dramatic problems faced by many houses as vocations disappear and financial challenges intensify. A “Unio extinctiva” of a weaker community joining a larger one is one manner of surviving. Yet this entails the canonical disappearance of the weaker house with time, so that most would prefer to maintain autonomy and independence and go to great lengths in order to do so. The phenomenon of closing monasteries and leaving buildings is often sentimental and irrational; monastic history shows, however, that almost all monasteries have closed and reopened several times in the past. “We think that we are professionals in letting go,” she summed up, “but we are not.” Can we learn to renounce superficial visions of success that flatter our vanity? The monks of Tibhirine didn’t have any vocations, they presumably had no future, but they were concerned with the here and now, obtaining great graces for the church. Hansen closed by citing Bernard’s phrase *ludam et vilior fiam* (ep. 87.12). In a paradoxical way, as we follow Christ we are at play, and even if humiliated, we still emerge victorious.

Abbot **Elias Dietz** (Gethsemani) spoke about the OCSO worldwide, the structures of the Trappist General Chapter, its recent constitutions, and statutes. The Order has 12 regions which include a total of 42 countries. There are today 1590 women and 1760 men who belong to the Stricter Observance. The ecclesial reality of the church today is sure to be reflected in the abbeys’ situation. Dietz noted that we should learn from recent analytical insights by research about the history of monasticism: they avoid “decline and reform” paradigms. In history, as today, these terms tempt us into looking at facts through a distorted lens which is often inaccurate and misleading. Instead of getting bogged down by judgmental comparisons, it is more useful to identify adaptations to changing circumstances. For instance, a very strong factor in understanding contemporary Cistercian life is globalization. A quarter of the community in Mount Saint Mary’s Abbey (Wrentham, Massachusetts) is from countries outside the USA). The merge paradigm for older communities, which Mother Christiane described as unattractive to many, are developing in a similarly problematic manner in Trappist houses in Ireland, for instance. The trend among vocations in the USA is toward converts; of the four novices currently in formation at

Gethsemani Abbey, three are converts. African houses, on the other hand, are under political duress and isolated.

Abbot **Mark Scott** (New Melleray) presented a statistical profile of the membership of OCSO's USA Region, titling his comments "To Do and to Live". Generally, the number of people requesting to receive what we have to offer is quite small. Monks are getting older and communities are getting smaller in number. Responding to the trend, the OCSO has drafted a statute on the accompaniment of fragile monasteries. Scott asks, Is the US Region perhaps a "fragile region"? The region's strengths are unprecedented spiritual and theological resources, and the friendship and zeal of the membership. Yet in 2017 two abbeys were closed. The 10 male houses remaining may still be too many for the small volume of those interested in entering. From 2009–2018 there was a 33% drop in the monks' population. Interest in entering the novitiate is rare, and only 39% of those vested remain. Many houses have no juniors, in some cases there have been no professions for several years. Particular challenges come up when circumstances do not allow a community to keep the observances that are the vehicles of Cistercian identity. This leads to a "difference between what we say and what we do", and yet it seems to be an inevitable quandary, even with the best of intentions. Vigorous observance, which is so important to the men who gave us the Carta, becomes less and less possible. Scott closed by suggesting an experiment: A new OCSO community composed of select solemnly professed monks dedicated to the revitalization of Trappist-Cistercian life in the US for the sake of preserving the charism into the future. Supported by the US Region and dedicated to core Cistercian values in an environment suited to 21st-century sensibilities, the New Monastery would have the leisure simply to "do and to live" (Luke 10:28). Although it would be risky, the alternative is "we all just die in place." Calling his proposal "visionary-traditional", Scott sees in it an opportunity to shape a monastic culture committed to friendship and conversion, fidelity to the common will and monastic conversatio, favoring the cenobitical model of life in the desert.

Fr. **Joseph Van House** (Dallas) and Sr. **Maria Gonzalo** (Our Lady of the Angels, Crozet, Virginia) spoke about contemporary monastic documents and the CC. Under the title "We Cistercians. Rediscovering our Common Identity through the Charter of Charity", talked about contemporary documents that might lead to attaining the CC's ideal of being "indissolubly united in soul, even though parted in body". The Trappist Constitutions of 1990, presented by Gonzalo, list

30 values that constitute the Cistercian ideal; the most important among them is love. Van House talked about the Declaration of the General Chapter on Cistercian Life Today (1969, revised 2000) and distributed a handout and outline of the document. It is also available on the Dallas Abbey website under “History”.

Mother **Sofia Millican** (Wrentham, Massachusetts), Sister **Bede Berg** (Valley of Our Lady, Wisconsin), Father John Bayer (Our Lady of Dallas) made up the panel titled “Younger voices on the hoped-for future of the Carta Caritatis”. Sr. Bede made a résumé of the situation in Our Lady (Wisconsin): in the past few years, they have had three fathers immediate, two of which are no longer monks. Each of the recent visitors has been different. Millican talked about the Good Samaritans and the duty to help one another in the Order; there are creative possibilities which should be explored. Fr. John Bayer talked about discovering the strong sense of maternity in the Carta. A visitation should not be seen as crisis management but a chance for growth. In this sense, there should be more delegates, perhaps working in pairs. Secondly, we might discover an exciting, evangelical way to live unity and diversity. Bayer noted that unity is a promise of Christ, not something that we can earn anxiously or truly understand; nonetheless we should count on it. A lively discussion followed.

As a way of closing, there follows a selected documentation of some of the questions used for the small groups that met regularly during the colloquium. Conference participants were assigned to different groups as a way of getting to know monks and nuns from different backgrounds and deepen our understanding of what had been presented in the plenary lectures.

- The Prologue of the CC is concerned with unity over time (“decreed and left for their posterity” ... *statuerunt suisque posteris reliquerunt*). How are we united with our past? What is our responsibility to our own posterity? How well do our structures address this responsibility?
- The Prologue is concerned with unity over great distance (“abbeys in various parts of the world” ... *per abbatias in diversis mundi partibus*). To what extent did the Carta succeed in establishing unity in the Order despite cultural and geographical distance? In what concrete ways are our monasteries throughout the world in union with each other today? Is there anything in the Carta that can help us navigate cultural differences?
- Chapter 7 of the Carta mentions several purposes of the General Chapter: the salvation of the abbots’ souls; emending or adding to

observances; the good of peace and charity; correction of abbots' faults; mutual assistance, especially financial. Which of these concerns have Chapters dealt with most successfully? In General Chapters in our time, what issues arise that are most related to the concerns of the Carta?

- It was critically important to the founders that the “monks, though separated in body, could be indissolubly knit together in mind” ... *animis indissolubiliter conglutinarentur* (Prologue). Do we already have a good combination of unity and diversity in the Cistercian family, or does the balance need to be adjusted?
- Chapters 4–11 of the Carta view relations between monasteries primarily through the lens of relations between the superiors. Is this lens still helpful? If so, why? If not, what alternative would you suggest?
- What is the significance for our Orders of the change in the position of women in the structures of Cistercian life?
- What teaching of the Carta do you think most helpful for yourself, your community, our Orders, toward growing in love of Christ and true evangelical living?
- What will attract new generations of scholars to Cistercian scholarship?
- What do you find most interesting about the Carta Caritatis? What is its relevance for Cistercian life, for your own life, for others, today?
- Of the challenges mentioned by the panel of superiors, are there some you believe most important, and if so, does the Carta assist in any way in addressing them? What light do the recent documents bring to bear? Are there other challenges which should be mentioned?
- Regarding the hoped-for legacy of the Carta, what would your own hopes be?
- Chapter 3 of the Carta, “All Are To Have the Same Liturgical Books and Customs”, concludes: “one charity, one Rule, and like usages” (*una caritate, una regula, similibusque moribus*). If we were to formulate what holds us together as a Cistercian family today, what 2–3 word phrase would you suggest for the third term now: “one charity, one Rule, and one \_\_\_\_?” [answers included: Christ, poverty, mother (Cîteaux), desire, common heritage, prayer, communion, family, goal, Carta, call, resolve, school, source].