

ECONOMY AND SELF-SUSTAINABILITY: CLARETIAN PRINCIPLES

I. INTRODUCTION: CLARETIAN VISION OF ECONOMY

In the Claretian tradition, economy is not a secondary administrative concern, nor a merely technical field reserved for bursars, administrators, or superiors. It belongs to the very heart of missionary discipleship because it touches how we relate to material goods, power, comfort, dependence, freedom, and trust in God. The way a missionary earns, receives, uses, saves, shares, and accounts for resources reveals not only practical competence but also spiritual maturity, evangelical freedom, and apostolic clarity.

For a Claretian missionary, economy is inseparable from vocation. It is a lived expression of apostolic poverty, community life, solidarity with the poor, trust in Divine Providence, and responsibility for the mission entrusted to us. Goods are never neutral. They can either become instruments of service, fraternity, and evangelization, or sources of attachment, inequality, self-protection, and distortion of mission. Therefore, formation in economy is not only about learning financial procedures; it is about shaping a heart that knows how to live simply, share joyfully, administer honestly, and plan responsibly.

In today's world, the economic dimension of formation has become even more urgent. Formees live in a global culture marked by consumerism, digital spending, instant gratification, individual ownership, hidden debt, ecological irresponsibility, and increasing dependence on unstable economic systems. Without intentional formation, a candidate may profess evangelical poverty externally while remaining inwardly attached to security, status, convenience, or consumption. This creates a dangerous gap between religious identity and actual life.

At the same time, the missionary today is also called to become more economically competent and pastorally responsible. Mission requires planning, sustainability, transparency, legal awareness, collaborative stewardship, and ecological responsibility. Apostolic works, houses of formation, social projects, and missionary communities all require responsible economic structures. The missionary who cannot live simply, work responsibly, and relate maturely to resources will struggle to sustain the mission with integrity.

This formation guide is therefore designed to help formees internalize a **spiritual, communal, ethical, and practical approach to economy and self-sustainability**. Drawing from the Claretian Constitutions, Directory, Gospel values, and contemporary ecclesial concerns—especially ecological and social responsibility—it seeks to prepare formees to become:

- spiritually free in relation to material goods
- responsible and transparent stewards
- active participants in communal economic life
- simple and credible witnesses of evangelical poverty
- economically prudent and pastorally competent missionaries
- builders of sustainable and mission-oriented communities

This module is not meant to create merely “efficient administrators,” but missionaries whose economic life becomes a visible expression of the Kingdom: marked by simplicity, fraternity, justice, responsibility, and trust in God.

II. FORMATION OBJECTIVES

By the end of this module, formees will:

- 1. Deepen their understanding of Claretian economic spirituality:** They will grasp that economy is not separate from spirituality but part of discipleship, mission, community life, and apostolic poverty. They will learn to interpret economic life through the Gospel and the Claretian charism.
- 2. Cultivate attitudes of detachment, simplicity, stewardship, and trust in Providence:** They will gradually develop inner freedom from consumerism, possessiveness, entitlement, and material anxiety, learning to live with gratitude, moderation, and generosity.
- 3. Develop foundational skills in financial management and sustainability:** They will acquire practical competencies such as budgeting, expenditure tracking, basic accounting awareness, sustainable use of resources, project planning, and responsible communal decision-making.
- 4. Learn to participate in communal economic discernment:** They will grow in co-responsibility by learning how to reflect, dialogue, evaluate, and make decisions about material resources within community and mission settings.
- 5. Integrate ecological awareness and self-sustainability into daily life:** They will understand the relationship between economy, ecology, and justice, and practice sustainable habits in food, energy, water, consumption, and waste management.
- 6. Embody ethical and evangelical values in economic behaviour:** They will learn to connect economic decisions with truthfulness, accountability, justice, solidarity, care for the poor, and respect for communal goods.
- 7. Prepare for future missionary responsibility:** They will be introduced to the practical realities of managing resources in formation houses, apostolic communities, parishes, schools, social centres, and mission projects.
- 8. Internalize an economy of communion and mission:** They will increasingly understand that every good received is a gift to be administered for the common good and the mission—not a possession to be controlled for personal comfort or status.

III. MODULE STRUCTURE BASED ON NINE CLARETIAN PRINCIPLES

1. Economy at the Service of the Mission (Dir 63, 518–521, CC 25, 99)

Formation Focus: All economic goods and transactions exist for the mission. Money, buildings, transport, technology, land, food, and institutional resources are not ends in themselves. They are means placed at the service of evangelization, fraternity, formation, justice, and the service of the poor.

Formation Insight

This principle is foundational. If economy loses its missionary orientation, it easily becomes self-referential, bureaucratic, or comfort-driven. A missionary may begin to organize life around convenience, preservation, institutional survival, or personal security rather than around the proclamation of the Gospel. Formation must therefore teach formees to ask not first, “How much do we have?” but rather, “How does this resource serve the mission?”

Mission-centred economy also requires discernment. Not every expense is justified simply because it is useful or attractive. The deeper question is whether it truly contributes to apostolic life, human dignity, formation, community, or evangelization.

Key Reflections

- How do I understand money and material resources in light of my missionary calling?
- Do I tend to see resources as personal security rather than missionary instruments?
- When I use money, do I instinctively think of comfort, image, and convenience—or of mission, fraternity, and service?
- Can I distinguish between what is useful for mission and what merely feeds comfort or prestige?

Practices

- Design a weekly budget where each item is explicitly linked to a missionary or formative purpose.
- Reflect monthly on all personal expenses and classify them under: **necessary**, **helpful**, **questionable**, or **unnecessary**.
- Study concrete examples from the life of St. Anthony Mary Claret that show simplicity, providence, and mission-centred use of resources.
- Group exercise: simulate establishing a mission station and prioritize expenditures under conditions of scarcity.
- Analyse case studies where apostolic works lost missionary focus due to poor economic priorities.

Formation Outcomes

A formee growing in this principle:

- evaluates resources in terms of mission
- resists luxury and institutional vanity
- uses goods intentionally
- develops a practical sense of missionary priorities

2. Communal Nature of Goods (Dir 64–65, 580, CC 26)

Formation Focus: In religious life, we renounce personal ownership in order to live as brothers who hold goods in common. Community economy is not simply a legal arrangement; it is a spiritual and fraternal expression of belonging, equality, trust, and communion.

Formation Insight

A missionary who lives in community but clings inwardly to “my things,” “my money,” “my preferences,” or “my private resources” is not yet formed in communal poverty. Formation must therefore address not only external sharing but also the emotional and psychological dimensions of possessiveness.

The communal nature of goods demands more than occasional generosity. It requires a real conversion from private logic to common discernment. This includes willingness to share space, tools, books, devices, food, transport, time, and opportunities. It also includes openness about gifts received, donations, travel allowances, stipends, and other material benefits.

Key Reflections

- Do I struggle with attachment to personal possessions or preferences?
- Do I instinctively hide, reserve, or protect things “for myself”?
- How do I react when what I use must be shared or redistributed?
- Do I experience community economy as a burden or as a liberation?

Practices

- Hold regular “community stewardship meetings” where practical decisions about goods are discussed openly.

- Practice a week of deeper communal dependence, using only shared community resources for ordinary needs.
- Read Acts 2:42–47 and Acts 4:32–35 and reflect on the spiritual meaning of shared goods.
- Conduct a “hidden possessions audit” in a formative way: identifying items or habits that reveal unconscious possessiveness.
- Practice rotating responsibility for commonly used goods to foster shared ownership.

Formation Outcomes

A formee growing in this principle:

- shares easily
- avoids possessiveness
- respects common goods
- develops fraternity through economic simplicity and transparency

3. Sustainable Economy (Laudato Si')

Formation Focus: Economy must respect ecological balance, intergenerational justice, and the dignity of the poor. A Claretian economy cannot be truly evangelical if it is wasteful, exploitative, environmentally irresponsible, or disconnected from the cry of the earth and the cry of the poor.

Formation Insight

Self-sustainability is not merely about generating income or reducing costs. In a Christian and Claretian vision, sustainability means living in a way that is **viable, responsible, just, and regenerative**. It includes how we consume food, water, electricity, paper, fuel, land, digital resources, and institutional infrastructure.

Formation houses are ideal places to cultivate ecological conversion. The habits learned in formation—wasting food, overusing electricity, depending on convenience, ignoring waste—often remain into later life. Conversely, sustainable habits practiced early become part of missionary identity.

Sustainability also includes the capacity of communities and apostolates to support themselves responsibly through appropriate planning, work, collaboration, and prudent use of available resources.

Key Reflections

- Is my lifestyle ecologically responsible or unconsciously exploitative?
- Do I understand the relationship between consumption, waste, and justice?
- How does my use of common resources affect the poor and future generations?
- Do I see care for creation as part of missionary witness?

Practices

- Organize an “Eco-Sabbath” or low-consumption day once a month.
- Develop a community garden, herb plot, or small-scale agricultural initiative.
- Measure and review monthly electricity, water, and food waste patterns.
- Conduct ecological audits of the formation house.
- Integrate ecological reflection into prayer, liturgy, and community evaluation.
- Study practical links between Claretian mission, ecological conversion, and sustainable living.

Formation Outcomes

A formee growing in this principle:

- consumes more consciously
- understands ecological responsibility as a spiritual duty
- values sustainable community practices
- connects simplicity with justice and mission

4. Diligence and Transparency (Dir 589)

Formation Focus: Every resource entrusted to us demands accountability. Diligence and transparency are essential expressions of truthfulness, justice, fraternity, and institutional credibility.

Formation Insight

Many serious crises in religious institutions do not begin with large scandals but with small habits of carelessness: poor record keeping, casual use of money, vague accountability, private spending without clarity, or a culture of silence around finances. Formation must therefore teach that financial integrity begins with the small and ordinary.

Transparency is not suspicion. It is a form of honesty and mutual trust. The missionary who is transparent in money matters usually also grows in inner coherence, simplicity, and responsibility. Likewise, secrecy around money often reveals deeper issues such as shame, entitlement, fear, manipulation, or immaturity.

Key Reflections

- Am I organized and honest in my use of money and resources?
- How do I react when asked to explain my expenses or decisions?
- Do I tend to justify unclear or unnecessary spending?
- Can others trust me with communal resources?

Practices

- Keep a personal expenditure log and review it monthly.
- Learn basic documentation practices: receipts, expense categories, simple ledgers.
- Present a mock budget to the community or formation team for review.
- Study examples of financial misconduct and identify warning signs and preventive habits.
- Practice “transparent purchasing”: explaining the purpose, cost, and necessity of selected expenditures.

Formation Outcomes

A formee growing in this principle:

- handles money responsibly
- communicates openly about expenses
- develops habits of order and accountability
- becomes trustworthy in economic matters

5. Poor Lifestyle (Dir 63–64, CC 23–27)

Formation Focus: A poor lifestyle is not misery, negligence, or lack of dignity. It is a free, joyful, and credible way of living with what is sufficient, avoiding excess, status-seeking, comfort-dependence, and unnecessary accumulation.

Formation Insight

Poverty must be learned not only as a vow but as a style of being. This includes how one dresses, travels, eats, uses technology, chooses comfort, relates to gifts, and imagines future life. A

person may profess poverty but still cultivate expensive tastes, entitlement, or subtle superiority. Formation must therefore help the formee identify not only visible luxuries but also invisible dependencies.

A poor lifestyle creates inner freedom. It also creates solidarity. Missionaries who live simply become more available, more adaptable, more credible among the poor, and less burdened by fear of loss.

Key Reflections

- What do I really need in order to live joyfully and fruitfully?
- Which comforts have become psychological necessities for me?
- Do I compare my lifestyle with others?
- Can I live with less without resentment?

Practices

- Undertake a “poverty fast” for a defined period.
- Conduct a personal belongings inventory and discern what is truly necessary.
- Practice “gratitude before acquisition”: waiting and reflecting before asking for or purchasing something.
- Reflect communally on consumer culture, digital consumerism, and lifestyle expectations.
- Hold a “simple living week” focused on moderation in food, devices, transport, and spending.

Formation Outcomes

A formee growing in this principle:

- lives with moderation
- resists consumerism
- becomes freer from material dependency
- witnesses to evangelical simplicity

6. Co-responsibility (Dir 521, 569)

Formation Focus: Economy is not the concern of a few. All members of the community share responsibility for how resources are acquired, used, maintained, and evaluated.

Formation Insight

A common distortion in formation is that formees remain passive regarding economic life: they consume what is provided, use what is available, and complain when things are lacking—but do not feel responsible for stewardship. This creates immaturity and dependency. Formation must therefore cultivate a sense of ownership without possessiveness, and participation without control. Co-responsibility means:

- caring for what belongs to the community
- participating in planning and evaluation
- learning how decisions are made
- understanding the cost and effort behind common goods
- contributing actively rather than merely receiving passively

Key Reflections

- Do I think of economic matters as “someone else’s responsibility”?
- Do I care for community goods as if they truly belong to all of us?
- Am I willing to participate in planning, evaluation, and stewardship?
- Do I take initiative when something needs repair, maintenance, or attention?

Practices

- Involve formees in community budgeting processes.
- Rotate practical responsibilities: supplies, inventory, maintenance, kitchen, garden, utilities.
- Use case studies of missionary communities facing economic dilemmas.
- Practice communal discernment around priorities, limitations, and resource distribution.
- Include formees in periodic house audits or stewardship reviews.

Formation Outcomes

A formee growing in this principle:

- becomes proactive
- cares for communal goods
- participates maturely in decisions
- learns to see economy as a shared mission

7. Economic Efficiency and Pastoral Activity (Dir 66–67)

Formation Focus: Pastoral and missionary works must be animated by charity and faith, but they must also be managed with responsibility, clarity, and efficiency. Evangelical purpose does not excuse poor planning or waste.

Formation Insight

Missionary zeal without practical stewardship can lead to burnout, confusion, financial instability, or even injustice. A pastoral initiative may be spiritually inspiring but economically unsustainable. Formation must therefore teach that prudence, planning, and organization are not opposed to faith—they are part of responsible service.

Economic efficiency in a Claretian context does not mean profit-maximization. It means using resources wisely so that mission can be sustained, expanded, and protected. It includes planning, evaluating outcomes, avoiding waste, maintaining infrastructure, and ensuring that apostolic efforts remain viable and credible.

Key Reflections

- Can I integrate missionary enthusiasm with practical responsibility?
- Do I tend to romanticize mission while ignoring concrete realities?
- How do I react to planning, budgeting, and administrative discipline?
- Do I see efficiency as worldly, or as a form of stewardship?

Practices

- Prepare a one-year budget for a hypothetical pastoral center or mission post.
- Analyse the sustainability of selected apostolic initiatives.
- Visit or study well-run Claretian ministries and identify their strengths.
- Practice project-based planning: goals, budget, timeline, evaluation.
- Reflect on the difference between missionary generosity and financial imprudence.

Formation Outcomes

A formee growing in this principle:

- thinks pastorally and practically
- plans responsibly
- respects limits and sustainability
- understands that stewardship strengthens mission

8. Work Ethic (Dir 69, CC 26)

Formation Focus: Work is a participation in God’s creative and redemptive activity. Every Claretian is called to contribute diligently through manual, intellectual, pastoral, domestic, and communal labour.

Formation Insight

A healthy relationship with work is essential for self-sustainability and missionary maturity. Work forms character. It teaches discipline, humility, cooperation, perseverance, realism, and service. A weak work ethic often reveals deeper issues such as passivity, entitlement, avoidance of responsibility, or fragmentation.

Formation must therefore cultivate respect for all forms of labour—not only visible or prestigious work, but also hidden, repetitive, ordinary, and manual tasks. In a missionary life, the ability to work faithfully without applause is a sign of maturity.

Work ethic is also related to self-sustainability. Communities that do not value work become dependent, disorganized, and often economically fragile.

Key Reflections

- Do I work consistently and responsibly, even when tasks are not interesting?
- Do I avoid manual work or ordinary responsibilities?
- How do I use my time?
- Do I contribute to the common good through my labour?

Practices

- Conduct a personal time audit.
- Integrate regular manual labour into the weekly schedule.
- Reflect on the spiritual meaning of work in community and mission.
- Invite senior missionaries to share testimonies about work, sacrifice, and fidelity.
- Practice “Ora et Labora” as a balanced spirituality of prayer and labour.

Formation Outcomes

A formee growing in this principle:

- works responsibly
- values hidden labour
- develops discipline and perseverance
- contributes meaningfully to community and mission

9. Coordination (Dir 565–567)

Formation Focus: The Congregation is a global missionary body. Resources, planning, needs, and responsibilities must be coordinated so that mission is served in a spirit of communion and solidarity.

Formation Insight

Economic maturity includes the capacity to think beyond one’s local context. A Claretian is not formed only for his room, his house, or even his province, but for the wider body of the Congregation and the universal mission of the Church. This requires awareness of interdependence, solidarity, and institutional responsibility.

Coordination also teaches humility. It helps formees understand that resources are often limited, needs are diverse, and mission requires shared discernment across local, provincial, and congregational levels.

Key Reflections

- Do I understand how local resources connect with wider missionary needs?
- Am I open to shared planning and institutional discipline?
- Do I think only locally, or also congregationally and universally?
- Can I value interdependence rather than seeking independence?

Practices

- Simulate a provincial or intercommunity funding allocation process.
- Introduce simple collaborative tools for tracking and planning resources.
- Practice project proposal writing and reporting.
- Study how Claretian structures coordinate mission, finance, solidarity, and sustainability.
- Reflect on global inequalities and missionary solidarity within the Congregation.

Formation Outcomes

A formee growing in this principle:

- thinks beyond himself and his local setting
- values coordination and solidarity
- understands shared responsibility in the wider body
- grows in missionary interdependence

IV. DAILY AND WEEKLY TOOLS FOR FORMATION

These tools help move the module from theory into daily habit. Formation in economy happens not mainly through occasional talks, but through repeated, embodied, reflective practice.

1. Morning Intention Prayer

“Lord, may I use today’s resources only in service of your mission and your poor. Teach me to receive with gratitude, use with responsibility, share with joy, and let go with freedom.”

This short prayer helps shape an inner disposition of stewardship at the start of the day.

2. Personal Budget Notebook

A daily or weekly record of:

- personal spending
- items requested
- gifts received
- needs vs wants
- reflections on simplicity and excess

This tool fosters awareness, honesty, and responsibility.

3. Weekly Community Dialogue

A one-hour session that may include:

- review of common use of resources
- practical concerns in the house
- sustainability initiatives
- challenges in sharing or simplicity
- discernment about needs and priorities

4. Monthly Sustainability Project

Assign a rotating small team to animate one practical initiative, such as:

- waste reduction
- garden management
- water conservation
- composting
- energy awareness
- repair and maintenance

5. Spiritual Journal Prompt (Monthly)

Suggested prompts:

- How have I related to material goods this month?
- Where did I experience freedom or attachment?
- What comforts am I becoming dependent on?
- How has God invited me to grow in simplicity and trust?

6. Monthly Simplicity Review

Each formee reviews:

- purchases
- requests
- use of time and resources
- attitudes toward shared goods
- patterns of excess or avoidance

7. Quarterly Community Stewardship Review

A more structured communal reflection on:

- use of common resources
- house expenses and priorities
- ecological habits
- areas for improvement

V. INDICATORS OF GROWTH

Dimension	Signs of Growth
Mission-Centeredness	Prioritizes apostolic and formative needs over comfort, status, or personal convenience; uses resources intentionally and purposefully
Simplicity	Lives joyfully with moderation; avoids unnecessary purchases and hidden consumer habits
Co-responsibility	Participates actively in planning, maintenance, and communal stewardship; takes initiative
Transparency	Keeps clear records; communicates honestly about use of resources; welcomes accountability
Sustainability	Shows ecological awareness; practices conservation and reduction of waste in ordinary life
Work Ethic	Works consistently and responsibly; values manual, domestic, intellectual, and pastoral labour

Detachment	Can let go of possessions, comforts, or preferences without resentment; shows interior freedom
Communal Sharing	Shares goods naturally; avoids possessiveness and private accumulation
Prudence	Makes balanced and thoughtful economic decisions; avoids impulsive or emotionally driven spending
Solidarity	Shows sensitivity toward the poor, the wider community, and the missionary body in economic matters

Interpretive Note: Growth in this area is usually gradual. The most important signs are not perfection or austerity for its own sake, but increasing freedom, responsibility, truthfulness, simplicity, and missionary intentionality.

VI. CONCRETE SUGGESTIONS FOR SUSTAINABILITY IN THE HOUSE OF FORMATION

These practical suggestions help make the formation house a living school of Gospel simplicity, ecological awareness, shared responsibility, and self-sustainability.

1. Energy and Water Conservation

- Install LED lighting and energy-efficient appliances where feasible.
- Create a habit of switching off unused lights, fans, chargers, and devices.
- Appoint rotating “energy stewards” among formees.
- Use timers or reminders for common utility management.
- Collect rainwater where feasible for gardening or cleaning.
- Repair leaks promptly and monitor excessive water use.
- Post practical awareness signs in common spaces.

Formation Value

This area teaches:

- responsibility for common goods
- ecological discipline
- respect for limits
- awareness of hidden waste

2. Food and Kitchen Practices

- Plan menus weekly based on real need and nutritional balance.
- Track food waste and discuss patterns.
- Encourage simple, healthy, and locally sourced meals.
- Promote seasonal food and plant-based options where appropriate.
- Practice moderation in feast and ordinary days alike.
- Involve formees in cooking, cleaning, stock-taking, and kitchen budgeting.
- Develop gratitude rituals around meals and food preparation.

Formation Value

Food practices reveal much about:

- entitlement

- excess
- gratitude
- discipline
- community participation

3. Waste Management

- Set up clearly labelled waste segregation points.
- Promote reuse of paper, containers, folders, and practical materials.
- Reduce printing and encourage responsible digital use.
- Avoid single-use plastics where possible.
- Organize periodic recycling drives or awareness campaigns.
- Repair before replacing whenever possible.

Formation Value

Waste management forms:

- ecological awareness
- respect for creation
- habits of moderation
- practical responsibility

4. Community Garden and Agriculture

- Develop a small vegetable, fruit, or herb garden.
- Integrate gardening into manual work schedules.
- Assign rotating teams for maintenance and harvesting.
- Explore simple forms of sustainable agriculture suited to local context.
- Use produce in meals as a sign of participation and gratitude.
- Integrate spiritual reflection on sowing, waiting, care, and fruitfulness.

Formation Value

Gardening fosters:

- patience
- manual discipline
- ecological sensitivity
- self-sustainability
- contemplative awareness

5. Simplicity of Personal Belongings

- Set reasonable community guidelines for clothing, footwear, devices, and personal accessories.
- Encourage review of unused possessions at least once a year.
- Hold a communal “Letting Go Day.”
- Promote shared use of books, tools, sports items, and practical equipment.
- Discern the symbolic and psychological meaning of accumulation.

Formation Value

This area helps form:

- detachment
- freedom
- moderation
- fraternity

6. Financial Literacy and Budgeting Exercises

- Introduce formees to basic budgeting and record keeping.
- Practice monthly mock budget exercises.
- Teach simple principles of cost estimation, maintenance, and savings.
- Introduce ethical concerns in banking, spending, and procurement.
- Help formees understand the actual cost of food, utilities, transportation, and formation infrastructure.

Formation Value

This area forms:

- realism
- prudence
- stewardship
- readiness for future mission responsibility

7. Sustainable Community Projects

- Organize small productive initiatives compatible with formation.
- Explore context-appropriate community enterprises or partnerships.
- Encourage projects that combine learning, service, and sustainability.
- Develop small apostolic fundraising initiatives linked to mission and solidarity.
- Evaluate all projects in terms of purpose, ethics, workload, and formation value.

Formation Value

These projects help formees learn:

- initiative
- teamwork
- accountability
- practical mission sustainability

8. Learning and Advocacy

- Integrate themes of ecological spirituality, economic justice, and responsible consumption into formation sessions.
- Invite resource persons such as farmers, accountants, social workers, or sustainability practitioners.
- Join local ecological or solidarity initiatives.
- Encourage reflection on global inequalities, mission funding, and structural injustice.

Formation Value

This area deepens:

- social conscience
- intellectual integration

- missionary awareness
- prophetic responsibility

9. Liturgical and Prayer Life Integration

- Include prayers for the poor, workers, creation, and responsible stewardship in liturgy.
- Celebrate the Season of Creation with practical and spiritual initiatives.
- Integrate gratitude and simplicity into retreat themes and community prayer.
- Use symbols of bread, soil, water, tools, and seeds in formation prayer.

Formation Value: This ensures that economy and sustainability are not treated as merely technical concerns but as part of the spiritual life.

10. Periodic Evaluation and Growth

- Use the assessment tool quarterly.
- Review sustainability goals at house meetings.
- Appoint a rotating sustainability committee.
- Celebrate growth milestones with thanksgiving.
- Identify not only failures but also concrete improvements and faithful efforts.

Formation Value

Evaluation fosters:

- realism
- accountability
- communal ownership
- continuity of formation

VII. ASSESSMENT TOOL FOR FORMEES

This self-assessment tool helps formees examine how deeply the values of evangelical poverty, stewardship, and self-sustainability are being internalized.

Instructions

Rate yourself from 1 to 5:

- 1 = Rarely true
- 2 = Occasionally true
- 3 = Sometimes true
- 4 = Often true
- 5 = Consistently true

Self-Assessment Table

Dimension	Indicator	Rating (1–5)
Mission-Centred Use of Resources	I choose and use goods based on their contribution to mission and formation.	☐
Communal Sharing	I gladly share goods and avoid possessiveness.	☐
Simplicity of Life	I am content with a modest lifestyle and avoid unnecessary purchases.	☐

Ecological Awareness	I make daily efforts to reduce waste and live sustainably.	☐
Financial Transparency	I keep track of my expenses and willingly account for them when needed.	☐
Economic Responsibility	I participate responsibly in communal economic matters when invited.	☐
Work Attitude	I approach work with discipline, consistency, and generosity.	☐
Detachment	I am not overly attached to money, comfort, or possessions.	☐
Co-responsibility	I take initiative in caring for communal goods and spaces.	☐
Integration of Values	I reflect on and align my economic choices with Gospel values.	☐
Care for Common Goods	I use shared resources respectfully and avoid waste or negligence.	☐
Readiness to Live with Less	I can accept limitations or inconveniences without resentment.	☐
Gratitude	I receive what is given with gratitude rather than entitlement.	☐
Trust in Providence	I am learning to live with less anxiety about material security.	☐
Sustainability Initiative	I contribute actively to ecological or self-sustainability practices in the house.	☐

Scoring Reflection

60–75 → You are showing strong signs of integration in this area. Continue growing in depth, humility, and consistency.

45–59 → There is healthy development, but some attitudes or habits need greater intentionality and purification.

30–44 → This area requires more conscious formation. Identify patterns of attachment, passivity, or inconsistency.

Below 30 → A deeper accompaniment process may be needed to explore attitudes toward poverty, work, responsibility, or material security.

Open Reflection Questions

1. What challenged me the most in this area of formation?
2. Where did I experience freedom or joy in living simply?
3. What attachments or fears surfaced in relation to money or comfort?
4. What habits do I need to change?
5. How can I grow in trust, stewardship, and communal responsibility?

VIII. ACCOMPANIMENT GUIDE FOR FORMATORS

This guide helps formators accompany formees intentionally in the development of **Claretian economic spirituality, practical responsibility, and self-sustainability**.

1. Key Principles of Accompaniment

- **Economy is both spiritual and practical:** Do not reduce accompaniment to technical correctness or external discipline. Explore the interior meanings behind economic behaviour.
- **Discern motives, not only habits:** A person may appear simple but be inwardly rigid, fearful, or proud. Another may be careless not out of rebellion but due to immaturity or lack of formation.
- **Link economy with freedom and vocation:** Patterns around money, possessions, comfort, and work often reveal vocational readiness or fragility.
- **Accompany without moralism:** The goal is not merely to “control spending” but to help the formee grow in evangelical freedom, truthfulness, and mission-oriented stewardship.

2. Areas of Observation for Formators

Area	Indicators to Observe
Attitude Toward Possessions	Shares easily; does not hoard, hide, or emotionally cling to goods
Community Living	Participates in communal decisions and accepts shared limitations
Simplicity	Avoids luxury, image-consciousness, excess, and entitlement
Accountability	Is open about expenses, requests, and use of common goods
Ecological Practices	Uses water, food, energy, and materials responsibly
Work Habits	Works consistently; avoids passivity, excuses, or selective responsibility
Detachment	Can accept limits and inconveniences without disproportionate reaction
Co-responsibility	Takes initiative in stewardship and practical house responsibilities
Emotional Meaning of Money	Shows signs of fear, control, shame, status-seeking, or insecurity around material matters

3. Accompaniment Strategies

Monthly Economic Check-In

Review:

- expense journal
- requests made
- reactions to simplicity or limitations
- participation in common responsibilities

Formation Conversation Themes

Possible themes:

- money and emotional security
- hidden consumerism
- personal history of poverty or privilege
- entitlement and deprivation
- gratitude and trust
- work and responsibility

Use Case Studies

Discuss realistic missionary situations:

- lack of funds in mission
- receiving personal gifts
- balancing need and simplicity
- sustainability of apostolic works
- use of technology and comfort

Communal Experiments

Examples:

- a week of simple meals
- a no-unnecessary-spending week
- an ecological audit
- communal sharing review
- common work initiatives

Progressive Responsibility

Assign practical roles in:

- budgeting
- inventory
- kitchen or supply management
- sustainability projects
- maintenance or garden coordination

4. Red Flags to Address

These do not automatically indicate bad will, but they require attention:

- repeated resistance to simplicity
- secrecy around money or possessions
- hoarding or hidden accumulation
- frequent requests without discernment
- excessive anxiety about future material security
- visible entitlement or comparison
- laziness or avoidance of ordinary work
- negligence toward common goods
- manipulative use of poverty language to avoid responsibility
- inability to tolerate material limitation

These signs often point to deeper areas needing accompaniment:

- insecurity
- shame
- family conditioning
- consumer identity
- control needs
- emotional dependency

5. Encouraging Growth

Formators can foster growth by:

- affirming concrete acts of responsibility and generosity
- linking economic maturity with missionary availability

- grounding formation in Scripture and Claretian spirituality
- helping formees name fears around deprivation or insecurity
- modelling transparency and simplicity themselves
- creating a house culture where stewardship is normal and shared

The witness of the formator matters greatly. A formation house cannot credibly teach evangelical poverty if the formative culture itself is marked by contradiction, indulgence, secrecy, or inconsistency.

6. End-of-Stage Evaluation Template (for Formators)

Questions for Evaluation

- Has the formee internalized the missionary meaning of goods?
- Does he show visible growth in simplicity and detachment?
- Is he trustworthy in the use of money and common goods?
- Does he participate responsibly in communal economic life?
- Is he growing in work ethic and practical stewardship?
- Does he demonstrate ecological awareness and sustainability habits?
- Does he receive limitations with maturity and freedom?
- Is there evidence of interior freedom in relation to comfort and security?

Possible Overall Rating

- **Emerging**
- **Developing**
- **Stable**
- **Needs Focused Intervention**

Suggested Formative Recommendations

- deepen work discipline
- improve transparency
- reduce dependency on comfort
- grow in communal sharing
- strengthen sustainability practices
- address underlying insecurity or entitlement

IX. CONCLUSION

Economy and self-sustainability are not peripheral to missionary formation. They belong to the concrete truth of vocation. The way a missionary relates to goods, work, comfort, money, and common resources reveals whether the Gospel has truly begun to shape his freedom, his desires, and his way of inhabiting the world.

To be formed in this area is to learn a new way of living: not according to possession, accumulation, anxiety, or convenience, but according to **mission, fraternity, simplicity, stewardship, and trust in God**. It is to move from consumer logic to Gospel logic; from private ownership to shared responsibility; from waste to care; from comfort-seeking to availability; from fear to providence.

A Claretian missionary is called to become a **credible witness of evangelical poverty**: not by romanticizing deprivation, but by living with freedom, dignity, truthfulness, moderation, and solidarity. Such a missionary knows how to use goods without being possessed by them, how to work without self-centred ambition, how to plan without losing trust in God, and how to share without fear.

When economy is truly evangelized, it ceases to be merely a matter of administration or material management and becomes a genuine path of formation and discipleship. It becomes a school

of humility, because it teaches the missionary to live without pretension, entitlement, or attachment. It becomes a path of fraternity, because shared goods and common responsibility deepen the experience of brotherhood and mutual care. It becomes a witness of justice, because resources are used with honesty, fairness, and sensitivity to the poor. It becomes a discipline of responsibility, because every gift received is entrusted for stewardship and accountable service. It becomes a form of care for creation, because the use of material goods is guided by reverence, moderation, and ecological awareness. Above all, it becomes a service to mission, because all resources are understood as instruments for the proclamation of the Gospel and the building up of the Kingdom.

In this way, every formee is gradually called to become a joyful steward, receiving and using goods with gratitude and freedom; a responsible brother, committed to the common good and to communal accountability; a simple and transparent missionary, whose lifestyle reflects evangelical poverty and integrity; and a credible witness of the Kingdom, whose economic choices reveal the values of Christ. Thus, in all things—resources, labour, sustainability, community, and mission—the formee learns to live according to the spirit of Christ and the missionary fire of St. Anthony Mary Claret.