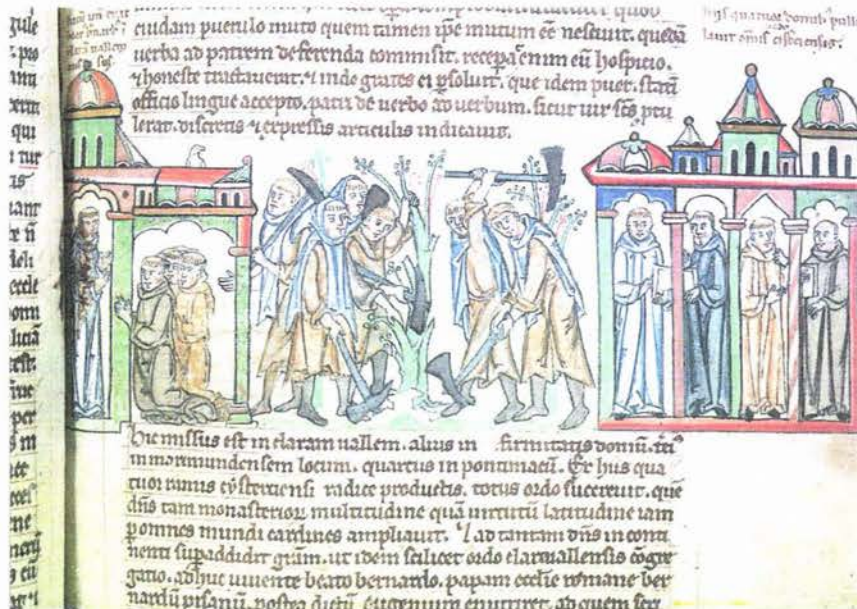


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Schola Caritatis

Twelfth Century Cistercians and the Ideas of Monastic Caritas and Amicitia



A thesis presented in partial fulfilment of the requirements for the degree
of Master of Arts in History at Massey University

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Illustration on Title Page

From Alexander's *Commentary on the Apocalypse*, c. 1243 and depicts on the left Stephen Harding commissioning a group of kneeling monks to found new monasteries; on the right the abbots of La Ferté, Clairvaux (Saint Bernard), Pontigny and Morimond – Alexander's 'Four Branches from the Cistercian Root' – within their respective churches; and in the middle a group of working monks testifying to the centrality of manual labour in the Cistercian reform. (James France, *The Cistercians in Medieval Art*, Stroud: Sutton, 1998, plate 6)

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Introduction

In the sixth century Saint Benedict recorded that he was composing his rule for monastic communities 'to safeguard love [*caritatis*]...' The idea of fraternal love, or *caritas*, had for a number of centuries been developed as the foundational concept and guide for monks living together in communities. Ever since Pachomius had brought monks together in the fourth century the centrality of the idea of *caritas* had never been disputed. For Saint Benedict the practice of *caritas* within a community led to *caritatem perfectam*, or 'perfect love' of God – the goal of all who followed the monastic life. The Rule of Saint Benedict became the fundamental observance for most of Western European monasticism, and the idea of *caritas* as Saint Benedict had expressed it was the bond that held these communities together. A related idea, the idea of *amicitia*, or friendship, with its implications of exclusivity and distraction was marginalised, although never really disregarded completely. *Amicitia* was always possible, according to monastic rules and institutions written by men such as John Cassian and Saint Augustine, and also in the Rule of Saint Benedict, but in practice the idea was discouraged. It was not until the growing affectivity of the eleventh and twelfth centuries that, within some monastic communities, the distance between these related ideas of *caritas* and *amicitia* began to narrow. In particular, a redefined idea of *amicitia* began to be integrated with *caritas* and to assume a more central position than it had previously held.

The late eleventh and early twelfth centuries were a period of challenge and change for the monastic houses of medieval Europe. The appearance of new reforming orders challenged the older Benedictine orders such as Cluny and similar abbeys, refuting and abandoning their splendour and power for a new life centred on prayer and the practice of asceticism within a supportive community. Of these reforming orders, the Cistercians were the greatest and most successful. The Cistercians defined their Order by the *Carta Caritatis*, or Charter of Love. This document not only instituted a strict observance of the Rule of Saint Benedict, but gave the idea and practice of fraternal *caritas* a central role in maintaining a uniform observance in all abbeys throughout the rapidly growing Cistercian Order, so that they would 'live by one charity [*sed una*

caritate], one Rule, and like usages'¹. It was within the nurturing reform environment where the practice of fraternal *caritas* was openly and deliberately encouraged by the cultural framework created by the charter that individual abbots began to redefine the idea of *amicitia* and relocate its practice within the monastic environment. The work of Bernard of Clairvaux indicates a shift in acceptance of the idea of *amicitia* in which it became an acceptable, even desirable, part of monastic experience and was linked with the practice of *caritas* – friends and brothers together. The later work of Aelred of Rievaulx integrated the two ideas further. The idea of *amicitia* became located within the context of fraternal *caritas*. For Aelred *amicitia* was an exclusive form of *caritas* reserved for one or two close and intimate companions within the abbey environment. These close bonds of *amicitia* embedded within fraternal *caritas* could lead to what Aelred called *amicitiae perfectionem* – the 'perfect friendship' of God.

This study analyses the development and operation of the idea of *caritas* within the context of the early Cistercian monastic environment and later attempts to integrate the related idea of *amicitia* into Cistercian ideals and practices of fraternal *caritas*. It demonstrates the centrality of fraternal *caritas* in the Cistercian Order, and also demonstrates the movement of *amicitia* from a marginal position in monastic culture to a position where it became recognised by some Cistercians as a special type of *caritas* and was centrally located within that ideal. The key primary texts are those related to the establishment of the Cistercian Order. The Rule of Saint Benedict regulated the idea of *caritas* and these regulations became the foundation for Cistercian ideas about *caritas*. Early Cistercian narrative and legislative documents such as the *Exordium Parvum* and the *Carta Caritatis*, and the earliest customary, the *Ecclesiastica Officia*, were used by the Cistercians to create a monastic environment conducive to the practice of fraternal *caritas*. Works written by both Bernard of Clairvaux – his *Apologia*, *De gradibus humilitas et superbiae*, *De diligendo deo*, and his *Sermones super Cantica canticorum* – and Aelred of Rievaulx – his *Speculum Caritatis* and *De Spirituali Amicitia* – are also examined. These abbots used their works to locate the idea of fraternal *caritas* within the individual monk's spiritual journey. Their work also explored the idea of *amicitia* and its place within the monastic environment, eventually integrating the two ideas together. All of these texts use the language of monastic culture to describe the ideals of relationship within the monastic community. This language is used in different ways to idealise these relationships – regulatory in the Rule of Saint Benedict, institutionally in the Cistercian

¹ Chrysogonus Waddell, (ed.), *Narrative and Legislative Texts from Early Cîteaux: Latin Text in Dual Edition with English Translation and Notes*, Cîteaux: Commentarii cistercienses, 1999, p. 444.

founding documents and customary, and spiritually in the works of Bernard of Clairvaux and Aelred of Rievaulx.

Caritas is often defined by the English word 'charity' – that is, charity as self-giving love. The Christian idea of *caritas* comes from the biblical commandment of Jesus to love God and then to love your neighbour as yourself, and is defined in monastic culture in terms of a monk's love for God and also his love for his brother monks. In monastic writing these ideas are often related to each other – in order to love God a monk must love his brother, and by loving his brother a monk learns to love God. God's love for humanity as a whole is also represented by the word *caritas*. *Caritas* therefore can have three different but related meanings – God's love for man, man's love for God, and man's love for his neighbour. The primary definition of *caritas* for this study is man's love for his neighbour, the idea of fraternal *caritas*, although the other meanings for *caritas* do occur within the context of the thesis. The word *caritas* is a Latin word – the corresponding Greek word is *agape* – and is only found in noun form. Medieval authors used other Latin verbs to describe *caritas* in action – verbs such as *amor*, *amare* and *diligere* – making translation into English with its single word for love, and the multiple meanings this word can have, a difficult and often inexact task. *Caritas* then, for the purposes of this study, is predominantly defined as fraternal or brotherly love.

The basic definition of *amicitia* is the idea of friendship. The medieval idea of friendship relied heavily on classical ideas and constructions of friendship expressed in the works of the Greek philosophers Aristotle and Plato, and the Roman statesman Cicero. Cicero defined *amicitia* as a 'complete identity of feeling about all things divine and human, as strengthened by mutual goodwill and affection'². Other definitions of *amicitia* contributed to the medieval idea. Biblical ideals of *amicitia* are based on examples of friendships such as Jonathan and David, Jesus and Lazarus, and also Jesus and John 'the disciple Jesus loved'. While these biblical examples of *amicitia* ensured that the idea could never be entirely dismissed from the agenda of the monastic community, the implicit exclusivity and self-centredness of these relationships threatened the basic principles of a community committed to the practice of fraternal *caritas*. Any definition of

² Brian Patrick McGuire, *Friendship and Community: The Monastic Experience 350 –1250*, Kalamazoo: Cistercian Publications, 1988, p. xiv.

amicitia within monastic communities must take into account the inherent tensions that this idea brought into a culture of fraternal *caritas*. A definition of *amicitia* for this study then, is the idea of exclusive and individual friendships that may or may not have had the capacity to threaten the very basis of the monastic culture in which they were practiced.

While there has been a considerable amount of recent work regarding medieval Cistercians and their place in medieval culture, only a small amount of this work gives attention to the ideas of *caritas* and *amicitia*. Generally these two ideas are considered separately. The present study is informed by two recent works – Martha G. Newman's *The Boundaries of Charity: Cistercian Culture and Ecclesiastical Reform, 1098-1180* (1996), and Brian Patrick McGuire's *Friendship and Community: The Monastic Experience, 350-1250* (1988). Newman's work concentrates on the political and social activities of twelfth century Cistercians and argues that these activities grew out of their interpretation of monastic life – particularly their interpretation of *caritas*. She focuses on the Cistercian concept of *caritas* as an active component of their involvement in society outside the monastic community. While she carefully defines the role of *caritas* in creating a unique monastic culture – it is this section that informs the present study – she says nothing at all about any role or relationship that *amicitia* might have within the context of fraternal *caritas* and the Cistercian's inward journey towards God. McGuire's work on *amicitia* shows a similarly singular focus. He comprehensively examines the concept of monastic friendship through the late classical and early medieval periods. Throughout his work he develops a consistent argument for the existence of individual friendships within monastic communities with many examples from monastic and secular literature from the period. His work concentrates solely on the idea of *amicitia* and he makes no attempt to contextualise these friendships within the idea of fraternal *caritas*. While his work on the Cistercian period deals with Bernard of Clairvaux's supposed friendship with Peter the Venerable, and Aelred of Rievaulx's development of the idea of *amicitia*, he does not seek to place these within the context of Cistercian *caritas* – he examines them solely from the perspective of friendship. McGuire accentuates the growth and exclusivity of individual friendship within the context of monastic communities but makes no explicit attempts either to compare or integrate the idea of *amicitia* with that of *caritas*. What the present study does is draw from both these secondary sources among other minor ones, and situates itself between them to show the related development and connection of two ideas that for both Newman and McGuire were singular foci.

While this study will focus on the development of Cistercian ideas of *caritas* and *amicitia*, the prologue will briefly examine these ideas in the context of early Eastern and Western monasticism in texts by Pachomius, Cassian and Saint Augustine. A developing concept of fraternal *caritas* was central in each of their works. While the idea of *amicitia* was thought to be closely related to *caritas* it was always considered marginal within the monastic community, although never disregarded completely. The practice of *amicitia* was limited because of its exclusive nature and the potential for it to disrupt monastic life. Saint Benedict and his Rule will be examined in the first section of the thesis. The Rule was the foundation of Cistercian monasticism and the particular Cistercian interpretation of fraternal *caritas*. The idea of fraternal *caritas* was given a central position within the Rule. Saint Benedict ensured that the ascetic values of the monk's individual journey towards God were defined within the context of fraternal *caritas* practiced in a community. For Saint Benedict it was this combination that aided a monk to strive for the goal of *caritatis perfecta*, or perfect love. The idea of *amicitia* received little attention from Saint Benedict and, as with many other minor details he left this up to each individual abbot's discretion. For these early monastic leaders then, the idea of *caritas* was central to monastic life, while *amicitia* was marginal, sometimes even disregarded, and at best considered with caution.

The second section of the thesis will examine the texts used by the Cistercian founders as they established their communities and their particular emphases of monastic practice. The Cistercian *Carta Caritatis* espoused a strict observance of the Rule of Saint Benedict with particular emphasis on manual labour and an austere and ascetic lifestyle lived within community. The *Carta* gave the idea of fraternal *caritas* the central role of binding the rapidly growing number of communities together in a uniform observance and practice. The Rule of Saint Benedict was the final authority for the new Order and all, including the abbots and the General Chapter were subject to its regulations just as the monks were. However, using the idea of fraternal *caritas* as a force to unify and order the communities was a new development – the Rule had used the idea as motivation for unity within the community, but the Cistercians institutionalised *caritas* to validate and control their programme of reform. This particular interpretation of *caritas* did not go unchallenged and these challenges will be examined in section three of the thesis. The Cistercians were challenged from within their own Order by their laybrothers. According to the prologue of the laybrothers own customary they were to be treated as equals with the monks in Cistercian communities, but this same customary instituted practices that maintained clear divisions between both groups. The exclusion of laybrothers from the ideal of fraternal *caritas* led

to increasing tensions and finally, open revolt within communities. The Cistercians attempted to control the damage with *exempla*, or stories that rehabilitated and exalted the laybrothers role and position within the community. Challenges from the wider monastic community again attacked the exclusivity of fraternal *caritas*. The famous and well-documented controversy between the Cluniacs and the Cistercians that was initiated by the accusations and counter accusations of Bernard of Clairvaux and Peter the Venerable was a confrontation over *caritas*. The Cluniac interpretation of *caritas* stressed unity, flexibility and compromise within the wider monastic environment, while Cistercian *caritas* was unchangeable, exclusive and superior. Both of these challenges were never fully resolved and the internal and external tensions continued well into the next century.

The final section of the thesis will show how the Cistercians developed the ideas of *caritas* and *amicitia* in their own spiritual aspirations within the context of the affectivity of the twelfth century. The centrality of fraternal *caritas* in the *Carta Caritatis* provided the framework for these ideas to be explored in a nurturing and encouraging environment despite the seeming inflexibility of the *Carta*. Bernard of Clairvaux's work located the idea of fraternal *caritas* within the second step of his three steps to God – love of self, love of neighbour, then love God – giving the idea a clear role in the individual monk's journey towards God, not just within the community. For Bernard the idea of fraternal *caritas* was totally integrated into an individual monk's love for God. Bernard also embraces the idea of *amicitia* as he locates his own feelings about individual monks within the context of fraternal *caritas* and expresses a need for 'intimate human relationships' within the community. The later work of Aelred of Rievaulx took these ideas further. Aelred also located fraternal *caritas* within the context of the individual monk's journey towards God in the same way as Bernard, but he considered that the three steps were more dependent on each other than Bernard suggests. For him the idea of fraternal *caritas* permeated all three steps as each of the loves nurtured and encouraged the others. Aelred then embraced the idea and practice of *amicitia* within the monastic community more fully than it had been before. For him *amicitia* was the highest ideal of fraternal *caritas*. He considered that intimate, encouraging and comforting friendships within the community were an exclusive form of fraternal *caritas* and, in spite of the potential for discord, could be an integral part of the journey towards the perfect friendship, or *amicitiae perfectionem* of God.

The representation of fraternal *caritas* and *amicitia* by both Bernard and Aelred was a significant development in monastic culture. These developments originated in the traditional practice of monastic communities, but also in the new affectivity of the twelfth century. While the integration of *amicitia* into the idea of fraternal *caritas* seemed a logical step within the context of this affectivity, in the long term it clashed with the more ascetic values of Cistercian monasticism and had to be discouraged. In the short term the practice of these integrated ideals did much to encourage growth in communities and in the individual monk's journey towards God.

Prologue

The Foundations of Monastic *Caritas* and *Amicitia*

The ideas of monastic *caritas* and *amicitia* had their foundations in the earliest forms of cenobitic monasticism. The early fourth century Egyptian cenobitic communities of Pachomius – the so-called *Koinonia*, or brotherhood – were constructed by Pachomius using these ideals in his rules and precepts. The Pachomian community was large. Palladius, in his *Lausiac History*, reckoned the number of monks to be seven thousand men living in a number of monasteries that made up the whole community, with thirteen hundred alone in the great first monastery where Pachomius himself lived. Pachomius was originally an ascetic solitary who, according to Palladius, had a visionary call from his hermit cave where, so the angel of the vision said, he had already perfected his own ascetic lifestyle. This angelic vision called him to establish a new communal rule. He was to go and gather the young monks together in a community where ‘fulfilling like servants the duties of monastic life, they may be established in confidence’³ by attaining the knowledge from each other in order to gain their own perfection in a truly ascetic lifestyle. Within the confines of this new community the embryonic ideal of monastic *caritas* based on the idea of New Testament *koinonia* began to take shape.

The community that Pachomius formed, as the name *Koinonia* implies, was to be communal in nature. However, the Pachomian communal ideal appears to have been limited to the extent that the monks provided mutual support and respect for each other mainly in order to support their individual ascetic strivings towards God⁴. The Sahidic Life of Pachomius said:

He established for them the following rule: each should be self-supporting and manage his own affairs, but they would provide their share of all their material

³ Pachomius, *Pachomian Koinonia, Volume 2: Pachomian Chronicles and Rules*, trans. Armand Veilleux, Kalamazoo: Cistercian Publications, 1981, pp. 125-127.

⁴ Philip Rousseau, *Pachomius: The Making of a Community in Fourth Century Egypt*, Berkeley: University of California Press, 1985, pp. 58, 66.

needs either for food or to provide hospitality to the strangers who came to them, for they all ate together⁵.

While this mutual support appeared to be mainly for economic reasons – the rule clearly described the economic detail of how linen, mats and baskets were to be made from Nile rushes and then transported by boat to markets – Pachomius hoped that this embryonic idea of support within the community would develop into something more like the New Testament idea of *caritas* as expressed in Luke's description of the apostolic fellowship, or *koinonia*, in Acts 2:42-47. Again the Sahidic Life said that he 'proceeded in this way because he could see that they were not yet ready to bind themselves in perfect *Koinonia* like that of the believers which Acts describes: They were one heart and one soul and every thing they owned was held in common'⁶. For Pachomius then, the idea of *caritas* was expressed mainly through the individual's relationship with God, but he began to develop the idea of *caritas* within community by striving towards a New Testament model for the monastic economy with an emphasis on labour, and to a lesser extent on a communal liturgical life.

The idea of *amicitia* in Pachomian community did not exist apart from a more general idea that all were to be friends together in order to avoid conflict and disharmony. This idea of friendship is more aligned with monastic *caritas*, especially as Pachomius expressed it one of his letters:

Let there not be any enmity in their hearts. Let them rather know how to act in truth with one another, for it is a commandment of the law of God to seek peace and to walk in it before God and men, acting in truth in everything toward every man. Let them live in peace in everything, serving God and each other.⁷

McGuire translates it, '...so that you love all equally in serving God and concord'⁸. Rousseau says that '[if] there were "Pachomian lovers," their aim was to help others, to set them free, without necessarily obliging them by some more intimate relationship'⁹. Friendship for friendship's sake was discouraged.

⁵ Pachomius, *Pachomian Koinonia, Volume 1: The Life of Saint Pachomius*, trans. Armand Veilleux, Kalamazoo: Cistercian Publications, 1980, pp. 430-431.

⁶ *ibid.*, p. 431.

⁷ Pachomius, *Pachomian Koinonia, Volume 3: Instructions, Letters and other Writings of Saint Pachomius and his Disciples*, trans. Armand Veilleux, Kalamazoo: Cistercian Publications, 1982, pp. 69-70.

⁸ McGuire, *Friendship and Community*, p. 20.

⁹ Rousseau, p. 147.

Eastern monasticism continued to develop from its beginnings in the Pachomian *Koinonia* communities with particular influences from Basil and Origen but it was the work of John Cassian in the fifth century that indicated a transition of the Eastern cenobitic ideal to the Latin West. The work of Cassian described the external organisation and the theoretical teaching of the Egyptian monastics. Cassian sought to put these Eastern ideas into practice within a Western context when he left his own monastic environment in Bethlehem and founded two new monasteries in southern Gaul – now Provence in the south of France.

Cassian's *Institutes* were his summary and interpretation of the external organisation of Egyptian monasticism as he wanted to convey them within the context of a new community in the West. The first four chapters of the *Institutes* reconstructed the ascetic rules and precepts of the Egyptian communities for the guidance of the new monastic communities of the West. The rules related to the clothing of monks, the night and daytime offices, and the rules for new monks. What the rules did was construct an external environment within which ideas of *caritas* and *amicitia* must operate, but little specific reference is made to these ideals in the four chapters themselves. The second part of the *Institutes* dealt with eight main vices, or sins, and discussed remedial action for these. The list of sins indicated a concern not only with ascetic practice, but also with relationship within community, dealing with topics such as anger, avarice, vainglory and pride – sins that in practice would have been detrimental to maintaining a communal idea of *caritas* or common charity.

Cassian's second work, the *Conferences*, was a much more theoretical approach to the ideas and teaching of eastern monasticism. In the *Conferences* Cassian discussed many topics such as evil spirits, God's protection, divine gifts, and perfection, but it is in the Sixteenth Conference, *De amicitia*, that Cassian gave an indication of his ideas regarding *caritas* and *amicitia*. The ideal of *caritas* was based, as was the Pachomian ideal, on the Acts description of the early Christian community, that 'the multitude of believers had one heart and one soul, and none of them said

that what he possessed was his own, but all things were common to them¹⁰. *Caritas* was to be practised in order to maintain peace and unity within the community:

Just as nothing is to be preferred to love [*caritati*]... everything that may seem inimical should be put up with and tolerated in order to maintain unharmed the tranquillity of love and peace, for it must be believed that nothing is more destructive than anger and annoyance and nothing more beneficial than love [*caritate*].¹¹

Cassian also singled out the idea of *amicitia* using the example of Christ's love for the disciple, John – '*discipulus ille, quem diligebat Iesus*'¹². Cassian went on to justify *amicitia* by saying that 'Yet, to be sure, he also included the other eleven, since they were similarly chosen, in so special a love [*dilectione*] that he distinguishes it with a gospel attestation: As I have loved [*dilexi*] you, you must also love [*diligite*] one another'¹³. Cassian argued that *amicitia* is the 'overflowing favor of a most abundant love [*exuberantissimi amoris*]'¹⁴, and finally said that:

This is a properly ordered love [*caritas ordinata*] which, while hating no one, loves [*diligit*] certain persons more by reason of their good qualities. Although it loves [*diligat*] everyone in a general way, nonetheless it makes an exception for itself of those whom it should embrace with a particular affection [*peculiari affectione*]. And, again, among those who are highest and chiefest in this love it chooses for itself some who are set apart from the others by an extraordinary affection [*affectui superextollantur*].¹⁵

For Cassian then, the ideas of *caritas* and *amicitia* were closely aligned. *Amicitia* had an acceptable place within the monastic context, but only as long as unity, or the practice of *caritas*, in the community as a whole was maintained.

Augustine from Hippo in the Roman province of Africa was a contemporary of Cassian and was the author of the oldest surviving monastic rule in the Latin west. As an academic in Milan, he was converted to Christianity in 386AD. After resigning his academic post, he resolved to live a

¹⁰ John Cassian, *The Conferences*, trans. Boniface Ramsey, New York: Paulist Press, 1997, p. 561.

¹¹ *ibid.*, p. 562.

¹² Jean Cassien, *Conférences VIII-XVII*, trans. E. Pichery, Paris: Les Éditions Du Cerf, 1958, p. 234. (Latin text and French translation).

¹³ Cassian, p. 565.

¹⁴ *ibid.*, p. 565.

¹⁵ *ibid.*, p. 565-566.

monastic lifestyle within monastic communities he created both before and after his appointment as Bishop of Hippo. These communities were founded, first at his own estate of Thagaste with his friends, and then in Hippo where his monastic community was formed with the clerics of the bishop's household. Augustine instituted a short and concise Rule for the communities, the *Praeceptum*, which survives in both masculine and feminine forms. The Rule is generally considered to be a summary serving as a reminder to the monks of Augustine's oral teaching, and also the teaching about monastic life interwoven through the large body of other works that he produced.

The Rule of Augustine is once again based on the communal life of the apostolic community of Acts 4 – a common life together and common ownership of property. The idea of *caritas* pervades the Rule, which is prefaced with the instruction: 'Love God above all else, dearest brothers, then your neighbour also, because these are the precepts given us as primary principles'¹⁶. Every practical rule and instruction was given to the monks with the one purpose in mind – 'the chief motivation for your sharing life together is to live harmoniously in the house and to have one heart and one soul seeking God'¹⁷. Augustine emphasised important aspects of communal life such as equality in spite of previous social standing, common prayer, modest dress supplied from a common wardrobe, obedience to a superior, work to be undertaken for the good of the community, and that individual needs in terms of the elderly and sick were to be considered.

While all of these things were traditional monastic practices, Augustine's Rule was dominated by the idea of fraternal *caritas*:

It is written of love [*caritas*] that it is not self-seeking (1 Cor. 13:5); that is to say, love puts the interests of the community before personal advantage, and not the other way around. Therefore the degree to which you are concerned for the interests of the community rather than your own, is the criterion by which you can judge how much progress you have made. Thus in all the

¹⁶ Augustine, *Augustine of Hippo and his Monastic Rule*, trans. & ed. G. Lawless, Oxford: Clarendon Press, 1987, p. 75.

¹⁷ *ibid.*, p. 81.

fleeting necessities of human life something sublime and permanent reveals itself, namely love [*caritas*].¹⁸

It is in the Rule of Augustine that the idea of monastic *caritas* underwent a transition. Previously, the eastern idea of *caritas* had been more to do with maintaining the individual and his own relationship with God through an ascetic, sometimes almost eremitic lifestyle lived within community. Augustine's emphasis on a more fraternal idea of monastic *caritas* led to a valuing of the part that life within the community itself played in the journey towards God. The individual becomes submerged in the community, and so the community as one entity has 'one heart and one soul seeking God'. It was these ideas in Augustine's Rule that paved the way for the later Rule of Saint Benedict.

¹⁸ Augustine, *The Rule of Saint Augustine*, trans. Raymond Canning, Kalamazoo: Cistercian Publications, 1996, pp. 19-20.

Section 1.

The Rule of Saint Benedict and Monastic *Caritas* and *Amicitia*

For the new order of the Cistercians of the eleventh and twelfth centuries the Rule of Saint Benedict was the basis of communal monastic life, as it had been for other monastic traditions for the previous 600 years. However, the Cistercian movement was a deliberate attempt to reinstate a more idealised and strict observance of the Rule – an observance that the Cistercian founders argued had been lost in practice over the previous centuries. As a reform movement it reacted against the perceived excesses of interpretation within the Carolingian monastic tradition that adhered to the Rule as it was reinterpreted by Benedict of Anaine, especially the interpretation exemplified in the traditions of Cluny, Gorze and Fleury. But whatever the tradition, emphasis or interpretation, all of these movements preserved as their standard of monastic life the Rule written by Benedict of Nursia.

Benedict of Nursia (c.480-547) was a relatively obscure Italian abbot about whom very little is known. The main source of information about him comes from the work of the Pope Gregory the Great who wrote a 'Life of Saint Benedict' as the second book of his 'Dialogues' about 50 years after the saint's death. Gregory's 'Life' is mainly didactic in style and attributes many miracles and signs to Benedict, but some basic biographical details of Benedict's life are discernible beneath the construction of a symbolic spiritual context for his life. Benedict came from a patrician family of Nursia in Umbria to Rome as a scholar. He quickly became disillusioned and fled to Subiaco in the Sabine hills where he lived in a cave as an ascetic for three years. During these three years others sought him out and became his followers, but when his community became too large he found a new site for them on the summit of Monte Cassino. Here he served as abbot for the remainder of his life, and it is here that Gregory says that 'He wrote a Rule for monks remarkable for its discretion and the lucidity of its language. If anyone wishes to know

more about his life and conversation, he can find all the facts of the master's teaching in this same institution of the Rule, for the holy man could not teach otherwise than he lived'¹⁹.

Benedict's Rule was a set of regulations for what he called in his Prologue a *dominici schola servitii* – 'a school for the Lord's service'²⁰. His monastery was a *schola*, a place where training in discipline and obedience was given, received and practised in order to subsume individual internal spirituality and external actions to the will and identity of the community alone. The image of a *schola* also had military connotations, so the monastic life was a life of military-like discipline and obedience, training its soldiers for endurance and suffering in the defence of its cause. However, he went on to say that:

In drawing up its regulations, we hope to set down nothing harsh, nothing burdensome. The good of all concerned, however, may prompt us to a little strictness in order to amend faults and to safeguard love [*caritatis*]... [As] we progress in this way of life and in faith, we shall run on the path of God's commandments, our hearts overflowing with the inexpressible delight of love [*dilectionis*]. Never swerving from his instructions, then, but faithfully observing his teaching in the monastery until death...²¹

So at the very beginning of his Rule, Benedict set down the ultimate agenda for his Rule and his monastic community – *caritas*.

The idea of *caritas* pervaded the Rule. But it was a *caritas* that picked up on the ideas of Augustine – *caritas* within a community that bound it together as a single entity seeking to live in the way of obedience and dedication to God. This fraternal *caritas* was the central value of Benedict's monastic community. In Chapter 72 of his Rule, he discusses what he calls 'The Good Zeal of Monks'. This 'good zeal' was explained as fraternal *caritas* that 'monks must foster with fervent love [*amore*]'. Benedict expected this fraternal *caritas* to be at the very core of the community, placing the idea within the context of the chapter before the love of God. He wrote that '[to] their fellow monks they show the pure love of brothers [*caritatem fraternitatis cast*

¹⁹ C H Lawrence, *Medieval Monasticism: Forms of Religious Life in Western Europe in the Middle Ages*, London: Longman, 1989, p. 22.

²⁰ Benedict, *RB 1980: The Rule of St. Benedict in Latin and English with Notes*, ed. Timothy Fry, O.S.B., Collegeville, Minn.: The Liturgical Press, 1981, pp. 164-165.

²¹ *ibid.*, pp. 164-167.

impendant]; to God, loving [*amore*] fear; to their abbot, unfeigned and humble love [*caritate*]²². For Benedict *caritas* was the inner motive for all that the Rule contains.

The Rule of Saint Benedict can be divided into two main sections – the first section from the Prologue through to Chapter 7 focusing on the spiritual dimensions of the community, and from Chapter 8 through to Chapter 73 focusing on the structure and discipline of the community. The first section relied mainly on the so-called 'Rule of the Master' as its source, which in turn relied heavily on Cassian and the desert asceticism of Pachomius and his successors. Because of this, Benedict defined obedience, silence and humility as necessary monastic virtues, but he also listed an inventory of good works in Chapter 4. Desert asceticism also influenced his definitions of hierarchy and authority within the monastic community. It was to these ascetic ideals that Benedict introduced his greater emphasis on *caritas*. This emphasis on communal *caritas* was implicit in his writing and not often explicit, but his declared purpose for his Rule to 'safeguard love' or 'safeguard *caritas*' showed clearly the influence of the ideas of Augustine about *caritas* in the community.

In the first section of his Rule Benedict gave some guidance on the qualities an abbot should show. The abbot was to model *caritas* to the community and 'should avoid all favouritism in the community [*Non ab eo persona in monasterio discernatur*]. He was not to love one more than another... [*Non unus plus ametur quam alius...*]²³. All monks were to be treated equally within the community no matter what their background. Benedict used as the basis for this argument the biblical injunctions from Galatians 3:28 that 'whether slave or free, we are all one in Christ', and also from Romans 2:11 that 'God shows no partiality among persons'. At the end of the argument the concept of *caritas* was reiterated with the words 'Therefore, the abbot is to show equal love to everyone... [*Ergo aequalis sit ab eo omnibus caritas...*]²⁴.

²² Benedict, *RB1980*, pp. 294-295.

²³ *ibid.*, pp. 174-175.

²⁴ *ibid.*, pp. 174-175.

Once the Rule had defined the qualities and authority of the abbot within the community, Benedict went on to define a list of instructions or 'tools of the spiritual craft'²⁵ – essentially a set of general Christian ethics adapted specifically for the monastic environment. The first tool was a biblical quote that sets the standard and ideal of *caritas* for the whole list – 'First of all, love the Lord God with your whole heart, your whole soul and all your strength, and love your neighbour as yourself'²⁶. The chapter then proceeded through a complete set of ethical instructions, all of which provided the context for the practice of fraternal *caritas*. Instructions such as 'the love of Christ must come before all else [*nihil amori Christi praeponere*]... you are not to act in anger or nurse a grudge... never turn away when someone needs your love [*caritatem*]...' ²⁷, and other various practical directions. Benedict finally placed these ethics or tools firmly within the context of the monastic community when he stated that '[the] workshop where we are to toil faithfully at all these tasks is the enclosure of the monastery and stability in the community'²⁸. The tools that maintain the ideal of *caritas* in the community were to be practised within the context of the community.

The final three chapters of the first section of the Rule discussed the three primary virtues of the monk – the virtues of obedience, silence and humility. Benedict used the ideas of Cassian and the Master, especially the *gradus* image that was later developed by others into the image of ladder rungs. He wrote:

The ladder erected is our life on earth, and if we humble our hearts the Lord will raise it to heaven. We may call our body and soul the sides of this ladder, into which our divine vocation has fitted the various steps of humility and discipline as we ascend.²⁹

These steps, or degrees, of the virtues of obedience, silence and humility could be seen as the development of the practice of *caritas* by the individual monk toward a final goal:

After ascending all these steps of humility, the monk will arrive at that perfect love [*ad caritatem perfectam*] of God which casts out fear. Through this love, all that he once performed with dread, he will now begin to observe without effort, as though naturally from habit, no longer out of fear of hell, but out of love [*amore*] for Christ, good habit and delight in virtue. All this the Lord will by the

²⁵ Benedict, *RB1980*, p. 187.

²⁶ *ibid.*, pp. 180-181.

²⁷ *ibid.*, pp. 182-183.

²⁸ *ibid.*, p. 187.

²⁹ *ibid.*, p. 193.

Holy Spirit graciously manifest in his workman now cleansed of vices and sins.³⁰

The interaction of these ascetic virtues with fraternal *caritas* maintained the spiritual tone of the monastery and led each individual monk and the community as a whole to the goal of perfect love. *Caritas* was not only the goal to strive for as Pachomius and Cassian interpreted it, but it was also present in the day to day reality of the monastic community, as interpreted by Augustine.

In the second part of the Rule Benedict set down the regulations that construct the actual material fabric, organisation and functioning of the community. These chapters defined the liturgical and penitential requirements, the ordering of the community dealing with food, sleep, clothing and material goods, relationships with the world outside the community, and also the special roles within the monastery such as the artisans, kitchen servers, priests, prior and porter. Although these instructions had the appearance of the mundane, Benedict did not waste any opportunity to emphasise the importance of *caritas* and its place in the everyday operation of the monastery. He wrote of the role of the monks in kitchen service saying that 'the brothers should serve one another... for such service increases reward and fosters love [*caritas acquiritur*]', and then after excusing some he says 'let all the rest serve one another in love [*ceteri sibi sub caritate invicem serviant*]'³¹. Likewise the porter must fulfil his duties 'with the warmth of love [*cum fervore caritatis*]'³². Guests must be received 'with all the courtesy of love [*cum omni officio caritatis*]'³³, and the guest himself may 'with all humility and love [*cum humilitate caritatis*] make some reasonable criticisms or observations, which the abbot should prudently consider'³⁴. The abbot as disciplinarian was not to allow faults to flourish but 'should prune them away with prudence and love [*sed prudenter et cum caritate ea amputet*] as he sees best for each individual'³⁵. Benedict judged that it was 'best for the abbot to make all decisions in the conduct of the monastery... for the preservation of peace and love [*pacis caritatisque*]'³⁶. Junior monks were also to practice the ideal of *caritas*, especially in terms of obedience – 'younger monks should obey their seniors with all love [*omni caritate*] and concern'³⁷... trusting in God's help, he must in

³⁰ Benedict, *RB1980*, pp. 200-203.

³¹ *ibid.*, pp. 232-233.

³² *ibid.*, pp. 288-289.

³³ *ibid.*, pp. 256-257.

³⁴ *ibid.*, pp. 274-275.

³⁵ *ibid.*, pp. 282-283.

³⁶ *ibid.*, pp. 284-285.

³⁷ *ibid.*, pp. 292-293.

love [*caritate*] obey³⁸. Benedict's emphasis on *caritas* throughout these instructions gave clear definition to a standard of *caritas* that was to be practised in the everyday organisation of the monastic community.

Benedict gave no specific mention of the idea of *amicitia* in his Rule. There was a brief allusion to Cassian's idea that one monk may deserve to be loved more than another, when Benedict advised that the abbot 'is not to love one more than another' and he added the proviso 'unless he finds someone in good actions and obedience'³⁹. Apart from this there was nothing. In fact Benedict gave a number of instructions to prevent circumstances where relationships between brothers might have the potential to disrupt the unity of the community. He wrote that:

... every precaution must be taken that one monk does not presume in any circumstance to defend another in the monastery or to be his champion, even if they are related by the closest ties of blood. In no way whatsoever shall the monks presume to do this, because it can be a most serious source and occasion of contention.⁴⁰

While not specifically legislating against close monastic friendships, Benedict did little to encourage them. Little contact could be had with friends and family outside the community, unless the abbot permitted it, and relationships within the community, even amongst natural family members, were discouraged as a perceived threat to the stability of the monastic community. This included letters and gifts:

Under no circumstances is a monk allowed, unless the abbot says he may, to exchange letters, blessed tokens or small gifts of any kind, with his parents or anyone else, or with a fellow monk. He must not presume to accept gifts sent him even by his parents without previously telling the abbot. If the abbot orders acceptance, he still has the power to give the gift to whom he will...⁴¹

Because the abbot did have the power to use some discretion, many of the strictures in the Rule may have been at times and in particular circumstances more relaxed. The chapters of the Rule that ordered daily activities such as common prayer, discipline, food, sleep and work, amongst other activities, all gave the abbot some discretion in his decision and policy making. The supreme authority of the abbot within the community and his own attitudes and judgements could

³⁸ Benedict, *RB1980*, pp. 290-291.

³⁹ *ibid.*, pp. 174-175.

⁴⁰ *ibid.*, p. 291.

⁴¹ *ibid.*, p. 259.

lead to differing application and reinterpretation of many of Benedict's rules that were more general in nature and open to reinterpretation. In terms of *amicitia* it appeared the abbot could use some discretion. As McGuire states, 'if he were interested in monastic friendships and felt they could be integrated into the discipline and daily life of the cloister, then Benedict's Rule allowed room for them'⁴².

Caritas in the Rule of Benedict was the inner motive for the community, not only the goal. It was fraternal *caritas* that bound the community together and motivated it towards the goal of *caritatem perfecta*. It challenged and embraced the asceticism of Pachomius and Cassian, and developed and reinforced the ideas of Augustine, but it did not disregard them. Benedict, in his final words commended the work of Cassian, the various 'Lives', and the Rule of Basil – 'all of these are nothing less than tools for the cultivation of virtues; but as for us, they make us blush for shame at being so slothful, so unobservant, so negligent'⁴³. Indeed it is these final words that echoed through the ensuing centuries to a small group of monks who in 1098 left their monastery to found a new community because of that very shame and dissatisfaction.

⁴² McGuire, *Friendship and Community*, p. 85.

⁴³ Benedict, *RB1980*, p. 297.

Section 2.

The Cistercian Founders and *Caritas*

In the year 1098 a small group of Benedictine monks left their monastery at Molesme to begin a new community at a site within the forests of Burgundy in France. While their main dissatisfaction appeared to be with the religious life as it was specifically practised at Molesme, in more general terms it was also dissatisfaction with religious life as it was practised in many monastic houses in the eleventh century. The dominant influence was the prevalent Carolingian monastic tradition, especially as it was interpreted by the traditions of Cluny and other similar movements such as Gorze and Fleury that practised an elaborate formalised liturgical ritualism within a monastic context of feudal wealth and aristocratic sponsorship. In a period when there were many reform movements beginning to break away from this predominant monastic culture, abbot Robert of Molesme and a group of about 20 monks left the monastery at Molesme to start a new monastery at a remote site named Cîteaux. The name given by the group to the monastery was simply *Novum Monasterium* – the ‘New Monastery’⁴⁴. Molesme itself had also been a ‘new monastery’ – a reform monastery founded by the same abbot Robert in 1075 in protest against Cluniac ideals and standards. Robert embraced the ideas of asceticism and believed that the ideals of desert asceticism were best practised within the support of a monastic community and these became the earliest ideals of the new community. He took his lead from Saint Benedict in the final chapter of his Rule where he advises those who are seeking perfection in monastic life to observe the teachings of the ‘holy fathers’, particularly the works of Saint Basil and Cassian⁴⁵. These early ideals of the New Monastery were to develop over the first decades into a formal constitution that expressed as its highest ideal the idea of *caritas* – the *Carta Caritatis*.

Disillusionment and disagreement motivated the exodus of Robert and his group of monks from Molesme. The monastery had reverted to many of the Cluniac ideals and practices that Robert had sought to leave behind. Robert emphasised a strict observance of the Rule of Saint

⁴⁴ Waddell, *Narrative and Legislative Texts from Early Cîteaux*, p. 401.

⁴⁵ Benedict, RB1980, pp. 294-297.

Benedict; as his *Vita* says: 'Blessed Robert, however, did not set his heart on growing rich, but strove to advance ever more and more towards God and to live soberly, righteously and godly according to the institutes of Saint Benedict'⁴⁶. The subsequent polarisation of views appears to have led to an intolerable level of conflict and hostility. According to the *Vita* of Robert, written in the thirteenth century, there had been previous attempts at separation from Molesme, with a number of retreats made to abbeys that adhered to a strict observance to the Rule of Saint Benedict. Robert himself withdrew to a small eremitic community at Aux, while four other senior monks, including Alberic and Stephen Harding retreated to a place called Vivicus. There appear to be some differences between the details recorded in the *Vita* and those in the early Cistercian narrative documents. The *Vita* implies that Alberic and Stephen Harding moved from Vivicus directly to Cîteaux and Robert joined them from Molesme, having previously returned there from Aux. However, both the *Exordium Cistercii* and the *Exordium Parvum* state that in 1098 Robert, Alberic and Stephen Harding left Molesme as part of a group of twenty-one monks and went together to Cîteaux to found the New Monastery. In spite of the narrative difficulties, it is clear that in the last decade of the eleventh century a group of monks, with the permission of the papal legate in the region, formed a new community in the forest south of Dijon at Cîteaux – or, as it is named in Latin, *Cistercium*.

The New Monastery's early years were years of hardship and difficulty, but these monks had found what they were searching for – a communal and ascetic life of poverty and solitude. However, the monks who remained at Molesme were to disturb this solitude. They petitioned Pope Urban II for the return of Robert, and in 1099 the legate ordered Robert back to Molesme, taking with him any others who found that life in the New Monastery was not to their taste. This reversal left the community decimated – William of Malmesbury in his *Gesta regum Anglorum* states that only eight monks remained⁴⁷. Under the newly elected abbot, Alberic, the community struggled on through difficult years. By the time Alberic died in 1109 the community had not only established itself economically and in principle, but had also obtained papal protection through the bull of Pope Paschal II issued 19 October 1100. The *Exordium Parvum* records the text of the bull where Paschal says 'We congratulate you on your monastic observance with fatherly affection. We decree, therefore, that the place where you have chosen to dwell for monastic

⁴⁶ E. Rozanne Elder, (ed.), *The New Monastery: Texts and Studies on the Early Cistercians*, Kalamazoo: Cistercian Publications, 1998, p. 16.

⁴⁷ Louis J Lekai, *The Cistercians: Ideals and Reality*, Kent, Ohio: Kent State University Press, 1977, p. 15.

quiet is to be safe and free from all mortal molestation, and that it shall be specially protected under the guardianship of the Apostolic See⁴⁸.

With the death of Alberic, his prior, Stephen Harding, was elected as abbot. It was in the abbacy of Stephen that the New Monastery at Cîteaux underwent the transformation from a solitary reform monastery to an order encompassing a large number of communities. By the time Stephen died in 1134 there were monasteries of the Cistercian order spread throughout Western Christendom⁴⁹. Stephen Harding was English and began his monastic life as an oblate at the Benedictine abbey of Sherborne in Dorset but left England for Scotland after the Norman Conquest, and then travelled to northern France and Rome before joining the new community of Molesme⁵⁰. Stephen appears to have been a very talented and able abbot. Orderic Vitalis the chronicler writing in 1135 two years after the death of Stephen said that he:

... laboured with utmost zeal and endeavoured in every way to have the site and the Order of the Cistercians founded... he was made its distinguished pastor and teacher... a man of great monastic fervour and wisdom... brilliantly outstanding in his teaching and his holy deeds.⁵¹

While much of what Orderic said may have been designed to construct a specific image of Stephen, the abbot did indeed have the qualities that were needed to organise and expand the monastery at Cîteaux. Under his leadership the community developed into a strong and scholarly community with a focus on study of original sources, a redefinition of the liturgy in line with the work of Saint Ambrose, and the production of fine manuscripts in the *scriptorium* of Cîteaux. The community's reputation brought in many new recruits, so that new foundations needed to be considered.

The geographic expansion of Cîteaux under Stephen Harding began in 1113 with a group of monks sent to begin a new community at Le Ferté. In 1114 a further community was established at Pontigny, and then two more in 1115, Clairvaux and Morimond. By 1119 five more houses had

⁴⁸ Waddell, *Narrative and Legislative Texts*, p. 432.

⁴⁹ Peter King, *Western Monasticism: A History of the Monastic Movement in the Latin Church*, Kalamazoo: Cistercian Publications, 1999, p. 172.

⁵⁰ Lekai, p. 17.

⁵¹ Elder, pp. 192-193.

been added to the number. It was in this year that Stephen obtained a new bull from Pope Callistus II that confirmed the work of Cîteaux and its new affiliated monasteries and its observance of the Rule of Saint Benedict 'and concerning some other things which seemed necessary to your Order and place'. The bull, once again recorded in the *Exordium Parvum*, goes on to say 'We confirm with our apostolic authority those articles and the constitution'⁵². The early Cistercian texts upheld the confirmed constitution as the *Carta Caritatis*, or the Charter of Charity, but recent research examining these texts has cast doubt on their historical accuracy.

During the twentieth century from 1930 onwards, but especially in the 1950s, there were many questions raised about the reliability and validity of the early Cistercian documents. Re-examination of the manuscripts has led to a reappraisal that places the appearance of the documents sometime after the death of Stephen Harding in 1134, possibly not even appearing until after 1150 according to recent research undertaken by Berman⁵³. The documents themselves are categorised in two main textual groupings. The first grouping consists of the *Exordium Cistercii*, followed by the *Summa Cartae Caritatis*, while the second grouping consists of the *Exordium Parvum* and two versions of the *Carta Caritatis*, the *Carta Caritatis Prior* and the *Carta Caritatis Posterior*. Recent work by Waddell also includes the *Instituta Generalis Capituli apud Cistercium* in this grouping⁵⁴. The *Exordium Cistercii* and its accompanying *Summa Cartae Caritatis* appear to be the earliest works. Waddell dates it at approximately 1136/1137 during the abbacy of Raynard de Bar as an introduction to the second recension or revised edition of the Cistercian customary, with Raynard himself as the probable author⁵⁵. Berman argues that they did not appear until after 1160 and were written by anonymous Cistercians⁵⁶. The later grouping headed up by the *Exordium Parvum* is assigned probable dual authorship by Waddell. He considers these texts to be the original work of Stephen Harding which are then edited by Raynard de Bar for inclusion as an introduction to the third recension of the Cistercian customary produced around 1147⁵⁷. Berman once again argues that these documents are anonymous and dates them at about 1170 with the *Carta Caritatis Posterior* dated at 1175⁵⁸.

⁵² Waddell, *Narrative and Legislative Texts*, pp. 451-452.

⁵³ Constance Hoffman Berman, *The Cistercian Evolution: The Invention of a Religious Order in Twelfth-Century Europe*, Philadelphia: University of Pennsylvania Press, 2000, p. 1-92.

⁵⁴ Waddell, *Narrative and Legislative Texts*, p. 415.

⁵⁵ *ibid.*, p. 388.

⁵⁶ Berman, p. 9.

⁵⁷ Waddell, *Narrative and Legislative Texts*, p. 415-416.

⁵⁸ Berman, p. 9.

The documents themselves give the appearance of having been written by Stephen Harding. Waddell's explanation of Stephen's authorship and later editing follows the insights of current Cistercian historiography. Berman challenges current Cistercian historiography by arguing that the documents are rhetorical, not historical. Her argument suggests that they are an attempt to create a conflated Cistercian 'mythology' in order to validate a process that evolved over a far longer period of time than the relatively fast establishment of ideal and practice stated by current Cistercian scholarship. She argues that the legal documents embedded in the text of the *Exordium Parvum* were designed to create a mythical legality for the community from the very beginning. Berman's thesis may have some significance for ideas about the development of Cistercian *caritas*. Her argument for a later authorship date of the various versions of the *Carta Caritatis* gives a different perspective to the ideals of *caritas* expressed in the document. Berman's thesis suggests that the *Carta Caritatis* ideals are an outcome of a 'conversation' about *caritas* at early Cîteaux and Clairvaux, and that '[this] conversation about monastic charity... did not require the existence of the administrative Order the Cistercians later created for themselves...' ⁵⁹. The view held conventionally by most historians within the Cistercian Order and others ⁶⁰ – and the view that informs this work – is that the various versions of the *Carta Caritatis* are an expression of a continuing and developing 'conversation' about *caritas* from the time Cîteaux began to found new houses in 1113. This 'conversation' continued throughout the twelfth century in the work of second generation founders such as Bernard of Clairvaux. However much the accuracy of authorship and date of this collection of documents is questioned, the fact remains that they do give valuable insight into the way the early Cistercians developed their own ideas about *caritas* and used it to construct their new communities.

The *Carta Caritatis* was essentially a Cistercian document, especially in the way it used the idea of *caritas*, but there were many aspects that it had in common with documents from other reformed houses that were functioning at around the same time. The monastery at Vallombrosa where Stephen Harding had apparently visited while on pilgrimage to Rome before he became a monk at Molesme had a set of regulations that attempted to deal with the tension between local autonomy and central control. The document was devised by the founder, John Gaulbert, who just prior to his death, wished to leave his monks 'the unity of charity and the concord of peace'. The monastery of Molesme also had documents that Stephen was actually involved in writing – the *Abbatiae Alpensis Creatio* and the *Concordia Molismensis*, for both of which Stephen acted

⁵⁹ Berman, p. xvi.

⁶⁰ Martha G. Newman, *The Boundaries of Charity: Cistercian Culture and Ecclesiastical Reform, 1098-1180*, Stanford: Stanford University Press, 1996.

as scribe. The concerns of both of these documents were taken up and expanded in the *Carta Caritatis* – the need to return to a strict adherence of the Rule of Saint Benedict, and the need to regulate the growing relationship between monasteries to provide some sort of control and supervision without the excesses of the authoritarian Cluniac order.

There is no clear definition in any of the early Cistercian accounts of the plan or programme regarding the idea of *caritas* that Robert might have wished to institute when he left Molesme other than a return to a stricter and more faithful adherence to the Rule of Saint Benedict. There is no evidence in the documents to suggest that a stricter observance was achieved until the emergence of the *Carta Caritatis* some twenty years later. The earliest Cistercian narrative account, the *Exordium Cistercii*, recorded the idea behind the *Carta Caritatis*. It stated that:

The venerable father Stephen... had provided in advance a document of admirable discernment, as a sort of pruning hook, namely, to cut off, the budding shoots of schism which, springing up, could at some time choke the burgeoning fruit of mutual peace. So it was that he wished this document to be given the appropriate name: Charter of Charity [*Cartam caritatis*] – because its every article is redolent of only what pertains to charity [*caritatis*], so that well nigh nothing else seems to be pursued in any of its parts, save this: Owe no man anything, but to love [*diligatis*] one another.⁶¹

In the later documents similar ideas were expressed, but now situated within the introductory text of the charter itself. Both the *Carta Caritatis Prior* and *Posterior* stated that it was a decree that was a covenant of *caritas* so that the various newly founded abbeys 'though separated in body, could be indissolubly knit together in mind'. The purpose is once again defined in terms of the idea of *caritas* – 'its statute pursues only charity [*solam caritatem*] and the advantage of souls in things human and divine'⁶².

While the idea of *caritas* was the central characteristic of the *Carta Caritatis* and the Cistercian programme as a whole, it was almost always linked to a uniformity of observance of the Rule of Saint Benedict. The passion to observe and to live according to the Rule was evident from the very beginnings of the New Monastery. Both William of Malmesbury and Ordericus Vitalis record

⁶¹ Waddell, *Narrative and Legislative Texts*, p. 402.

⁶² *ibid.*, p. 442.

the ongoing debates between Robert, Stephen, the new Cistercians and those who followed Cluniac ideals – a debate that was to continue well into the twelfth century. Lekai records a twelfth century Cistercian opinion of Cluniac customs as 'largely superstitious, contrary to decrees, synodal sanctions, even to the Holy Rule', while the Cistercians 'live according to the Rule of Saint Benedict which they vow to observe, the law given to monks by God through Saint Benedict, a legislator, like Moses'⁶³. Saint Benedict had written in his Prologue to his Rule, as already observed, that the purpose of the Rule was 'to amend faults and to safeguard love [*caritatis*]'⁶⁴. If the New Monastery was seeking to institute a strict observance of the Rule and indeed to go beyond the Rule towards monastic perfection as Benedict exhorts in the final words of the Rule, then a greater emphasis had to be placed on the idea of *caritas* in the programme of the monastery.

As the New Monastery began to expand and found new communities during the abbacy of Stephen Harding, challenges arose over how far control needed to be maintained over the growing movement in order to ensure that the ideals of Cîteaux were preserved and upheld. The solution came in the form of the *Carta Caritatis* composed by Stephen and the monks at Cîteaux in which direct control by the abbot of Cîteaux was limited and instead the Rule of Saint Benedict was to be the ultimate authority. In this way the Rule was used to impose a uniformity on all of the growing number of abbeys that followed the ideals of Cîteaux. As with the Rule, the early Cistercians wanted the idea of *caritas* to be the guiding principle, and this is clearly indicated in the title they gave to the new constitution. But the charter, unlike the Rule, contains almost nothing in terms of spiritual counsel or instructions for prayer and spiritual life. It appears to be a reasonably straightforward legal document to ensure conformity and peace within and between the Cistercian communities. Under the *Carta Caritatis* each abbey maintained its own independent identity and economy under its own elected abbot who was responsible for his own community. Any direct control that Stephen retained was solely for the 'care of souls'. He wrote:

We do wish, however, for the sake of charity [*caritatis*], to retain the care of souls, so that should they ever attempt to turn aside ever so little – which God forbid! – from their holy resolve and the observance of the Holy Rule, they may be able to return, through our solicitude, to the straight path of life.⁶⁵

⁶³ Lekai, p. 25.

⁶⁴ Benedict, *RB* 1980, pp. 164-165.

⁶⁵ Waddell, *Narrative and Legislative Texts*, p. 443.

Once the independence of each abbey and its abbot was established by Stephen, he continued on to introduce measures to ensure that there were controls in place through the practice of each abbey. He stated:

That they observe the Rule of the blessed Benedict in everything just as it is observed in the New Monastery. Let them not introduce a different meaning in the interpretation of the Holy Rule; but as our predecessors, the holy fathers – that is to say, the monks of the New Monastery – understood and kept it, and as we today understand and keep it, so let them too understand and keep it.⁶⁶

Stephen saw his role as ensuring the uniform observance of the Rule was maintained.

This uniform observance was to be maintained by a number of practical measures, many of which were listed as statutes of the General Chapter and attached to the *Carta Caritatis* as the *Instituta Generalis Capituli apud Cistercium*. Early in the *Carta Caritatis* an emphasis was placed on practical measures to ensure uniformity. As part of a discussion regarding the reception at any Cistercian house of monks from other Cistercian houses, Stephen said that all Cistercian houses:

... have the usages and chant and all the books necessary for the day and night Hours and for Mass according to the form of the usages and books of the New Monastery, so that there may be no discord in our conduct, but that we may live by one charity [*sed una caritate*], one Rule, and like usages.⁶⁷

Once again the idea of *caritas* was linked with a uniform observance of the Rule that also promotes a unity between the houses. There were also resonances and echoes of the words of both Cassian and Augustine – words that spoke of *caritas* as the ideal that maintained the peace and harmony of the community, in the case of the Cistercians, the extended Cistercian community as a whole. This idea of uniformity was evident once again in the capitula about the establishment of new abbeys:

All our monasteries should be founded in honor of the Queen of heaven and earth. No monasteries of ours are to be built in cities, walled settlements, or rural domains. A new abbot is not to be sent to a new place without at least twelve monks, or without these books: psalter, hymnal, collectary, antiphonary, gradual, Rule, missal; nor without having first constructed these places: oratory, refectory, dormitory, guest quarters, gatehouse – so that they

⁶⁶ Waddell, *Narrative and Legislative Texts*, p. 444.

⁶⁷ *ibid.*, p. 444.

may straightaway serve God there and live in keeping with the Rule. So that an indissoluble unity may be for ever maintained between the abbeys, it has been established in the first place that the Rule of the blessed Benedict be understood in only one way, and observed in only one way. Then, that the books be the same... the food the same, the clothing the same, and, finally, in everything, the same manner of life and custom.⁶⁸

The *Carta Caritatis* therefore, instituted a system by which the uniformity, and by implication, the unanimity of a network of communities could be affirmed and sustained, and the strong emphasis on *caritas* was a discouragement to any discord or conflict.

Part of the system to maintain uniformity instituted by the *Carta Caritatis* was the formation of a General Chapter. The General Chapter became the legislative body for the rapidly expanding order and sought to ensure that high spiritual standards and uniformity of life within the monasteries was maintained. The Chapter was convened once a year when abbots from all Cistercian communities came to Cîteaux 'on the day they decide among themselves'. All abbots were required to attend, exempted only by their own ill health or by the important function of the blessing of novices, in which case the prior of that abbey was expected to attend and report back to his abbot. Non attendance by an abbot for any other reason resulted in penance at the next meeting of the General Chapter. The *Carta Caritatis* stated a number of purposes for which the General Chapter was convened. Initially the abbots were to 'treat of the salvation of their own souls', but they were also to consider current practice of the Rule within their various houses and if anything was to be 'emended or added to in the observance of the Holy Rule or of the Order, let them so ordain it, and let them re-establish among themselves the good of peace and charity [*bonum pacis et caritatis*]'⁶⁹. While the preservation of peace and *caritas* throughout the Cistercian communities was the implied goal and outcome of the General Chapter, the need to maintain supervision and control over the growing number of communities was also implicit. Control was achieved by maintaining a strict and uniform observance of the Rule of Saint Benedict as interpreted by the abbot of Cîteaux and the Chapter – 'they are to obey in everything ... in the correction of things amiss and in the observance of the Holy Rule and of the Order'⁷⁰.

⁶⁸ Waddell, *Narrative and Legislative Texts*, pp. 408–409.

⁶⁹ *ibid.*, p. 446.

⁷⁰ *ibid.*, p. 447.

Financial concerns were also addressed in the Charter. There was to be no taxing of any community by another 'of earthly advantage or of temporal goods'. At the same time the importance of poverty was restated with a description of the members of the order as 'the most wretched of men', and also through a warning against 'wishing to gain abundance from their poverty'. The General Chapter was also expected to respond to the plight of any monastery in financial need, as reported by its abbot to the Chapter – the idea of *caritas* in practice, or love in action. Although the Rule of Saint Benedict expected monks to give up their own individual claims to ownership and to live in relative poverty with each receiving only what they needed⁷¹, the *Carta Caritatis* gave further definition to the boundaries of poverty with the idea that 'intolerable poverty' experienced by a community as a whole must be relieved by the General Chapter. All abbots, 'enkindled by the most intense fire of charity [*maximo caritatis igne succensi*]⁷², were to give out of their own monasteries' resources in order to relieve another's extreme financial situation. In this way resources were to be shared within the order on the basis of need rather than by elaborate and rigid forms of taxation, revenues and tithes such as those practised by Cluny and similar movements.

The *Carta Caritatis* also defined the role of the General Chapter in the discipline of abbots, especially if they were 'less zealous for the Rule or too intent on things secular, or habitually prone to any vice'⁷³. Within the context of the Chapter an erring abbot was to be 'charitably proclaimed [*ibi caritative clametur*]⁷⁴ by his fellow abbots, and required to fulfil the necessary penance for his fault. Further instructions regarding abbots who 'show contempt for the Holy Rule or for our Order' or who are 'found to be consenting to the vices of the brethren committed to [their] care' were set down in the *Carta Caritatis*. The abbot of Cîteaux, who is also Master of the General Chapter, was not immune to this discipline in spite of his position – 'if the abbots of our churches see their mother, that is to say, the New Monastery, growing listless in her holy resolve and swerving from the most straight path of the Holy Rule or of our Order ... admonish the abbot of that place'⁷⁵. As with any other abbot or monk who would not be corrected, the Charter made it clear that the abbot of Cîteaux could also be excommunicated and replaced. The universal nature of the application of these rules grew out of and contributed to the bonds of uniformity and unity that the Cistercian idea of *caritas* embodied.

⁷¹ Benedict, *RB1980*, pp. 230-231.

⁷² Waddell, *Narrative and Legislative Texts*, p. 442.

⁷³ *ibid.*, p. 446.

⁷⁴ *ibid.*, p. 446.

⁷⁵ *ibid.*, p. 448.

The overall authority of the abbot within the Cistercian community was restricted by the *Carta Caritatis* and subsequent *Instituta* and the loss of this authority meant a change in his position in the abbey. The abbot retained authority within his own community in terms of the normal abbatial roles of care and discipline, but as a result of the *Carta* and the General Chapter he was now subject to the Rule of Saint Benedict in the same way as his own monks were. Bernard of Clairvaux later reinforced this idea in his work *On Precept and Dispensation* – 'nor is the abbot above the Rule, for he himself once freely placed himself beneath it. There is only one power above the Rule of Saint Benedict which we must admit, and that is God's Rule, charity [*caritas*]'⁷⁶. Bernard went on to discuss the abbot's discretion and his obligation to the Rule:

I remember reading nothing about [the abbot] changing things at his pleasure. On the contrary we read "Let all follow the Rule as their guide, and let no one rashly depart from it" – no one, including the abbot. "Let all follow the Rule," he says, because "no one is to follow his own will". This too, I believe, includes the abbot.⁷⁷

The changes were reflected in the physical setup of the monastery. The *Ecclesiastica Officia* – the Usages, or Customary, of the Cistercian Order – which may have existed from the time of Abbot Stephen Harding but not standardised until the mid twelfth century, recorded the new position of the abbot within the context of liturgical practice. In spite of the authority the abbot still held within his abbey community, he was regarded in many respects as one of the monks. This flattened structure removed the opportunity for the many of the hierarchical abuses that the Cistercians perceived had been part of past monastic practice. In choir the abbot was not seated apart from the monks in a special chair as practised at Cluny, but took his place in the stalls with his brothers⁷⁸. Acknowledgement rituals within the context of the liturgy were downplayed with only the monks who were the abbot's neighbours seated in the choir having to pay deference with a bow on arrival⁷⁹. The abbot also took his turn as hebdomadary (that is, the priest on duty for the week) the same as every other priest in the community⁸⁰. As with every other monk he kept the rule of silence, took part in manual labour and slept in the common dormitory⁸¹. The abbot's position was not considered to be a position of privilege that set him apart either inside or outside

⁷⁶ Bernard of Clairvaux, *On Precept and Dispensation*, Spencer, Mass.: Cistercian Publications, 1970, p. 111.

⁷⁷ *ibid.*, p. 112.

⁷⁸ *The Ancient Usages of the Cistercian Order (Ecclesiastica Officia)*, Lafayette: Guadalupe Translations, 1998, Chap. 110: 1-5.

⁷⁹ *ibid.*, Chap. 68: 6-9.

⁸⁰ *ibid.*, Chap. 115: 41.

⁸¹ *ibid.*, Chap. 110: 6 -17.

the community – in fact many of his responsibilities were shared with the various other officials such as the prior and sub-prior, even in Chapter⁸². The *Instituta* even prescribed that an abbot was also able to be punished in the same manner as all in the monastery for arriving late for Choir – 'If an abbot does not arrive in time for the *Gloria* of the first psalm, he makes his satisfaction at the presbytery step *just like any other monk...*'⁸³. Newman quotes William of Malmesbury about 1124 writing that 'The abbot allows himself no indulgence beyond the others: he is everywhere present, everywhere attending to his flock, except that he does not eat with the rest because his table is always with the pilgrims and the poor'⁸⁴. The abbot was first and foremost a monk, and then second he was the abbot. While many of these usages and statutes over-regulated what was meant to be a pure observance of the Rule of Saint Benedict, the flattened hierarchical structure that they created was the type of community that was the ideal context for the practice of fraternal *caritas*.

Abbots were also involved in maintaining bonds of unity and uniformity amongst Cistercian houses by a programme of visitation inaugurated by the *Carta Caritatis* in order to supervise and regulate relationships between communities within the Order. Abbots of houses that had founded daughter-houses were to visit them annually, but the *Carta* does not elaborate on how or what these visits must entail. Standards for these visits were not defined until the late twelfth century. The *Carta Caritatis* gave some indication of what these visits should entail in a passage regarding visitations by the abbot of the New Monastery, as it contains an injunction that 'all visiting abbots of our Order should do likewise'. The visiting abbot from the mother house took the place of the local abbot in many functions, apart from dining with the guests and the day to day administration of the community. He could also become involved in cases of abuse against the Rule or against the Order – 'he should charitably apply himself to making correction [*caritative studeat corrigere*]'⁸⁵. Visitation was a means of ensuring a uniformity of practice within the Order by ensuring the correct adherence to the Rule of Saint Benedict and the *Carta Caritatis*, but at the same time respecting the autonomy of each specific community. The system was manageable while the number of monasteries was small but, as Lekai says, it became seriously impaired by the excessive amount of visits needed to be made by some abbots due to the rapid growth of the Order – Cîteaux had 24 daughter houses, Pontigny had 16, Morimond had 27 and Clairvaux had over 80. Although attempts were made to remedy the situation by either delaying or delegating

⁸² *Ecclesiastica Officia*, Chap. 70: 62.

⁸³ Waddell, *Narrative and Legislative Texts*, p. 477, (Emphasis added).

⁸⁴ Newman, p. 50.

⁸⁵ Waddell, *Narrative and Legislative Texts*, p. 445.

visitation, effective supervision and consequently uniformity within the Order began to suffer⁸⁶. Abbots then, had an important role in ensuring that a uniform practice of *caritas* was maintained not only in their own house, but also in all of their daughter-houses, and, by implication, throughout the whole Order.

Overall then, the purpose of the *Carta Caritatis* was to build up the concept of *caritas*, the practice of mutual love, within the communities of the Cistercian Order. As the *Exordium Cistercii* said of the Charter 'its every article is redolent of only what pertains to charity'. By using the idea of *caritas* in this way the Cistercians redefined *caritas* giving the idea a quasi judicial-legal status. In saying this it must be remembered that the *Carta Caritatis* was exactly that – a constitution or legal document designed not only to order the Cistercian way of life within their communities, but also to gain papal approval and patronage. The idea of *caritas* was singled out by Cistercian reformers as the main focus of their programme to demonstrate that their reformed way of community life was founded in the traditions of monastic *caritas* as it had been practised through the previous centuries. For the Cistercians *caritas* became the very glue that bound them together, as the Prologue to the *Carta Caritatis* demonstrates – 'with what charity their monks... could be indissolubly knit together in mind [*immo qua caritate monachi eorum... animis indissolubiliter conglutinentur*]'⁸⁷. However, using the idea of *caritas* in this way was an innovation. Although not discarding the idea of *caritas* portrayed in the Rule of Saint Benedict, it legalised and institutionalised the idea so that it became a force to unify and order by regulation.

Caritas in the Rule of Saint Bernard was an inner motive which resided at the core of the community. The Rule provided the tools and structure to maintain the community in its striving towards the goal of perfect charity – *caritatem perfectam*. While the Rule implied that *caritas* provided the focus for unity within the monastic community, there was no definitive argument within the Rule that completely justified the Cistercian use of the idea as a means of regulation and control. The reform ideal of the New Monastery was to return to a true observance of the Rule, so to them the idea of *caritas* was an obvious choice of emphasis. The Cistercian's adherence to the Rule of Saint Benedict as authoritative and God-given led to, in their perception, a literal and pure observance. It also led to the idea that their strict reform or reinterpretation of

⁸⁶ Lekai, p. 50.

⁸⁷ Waddell, *Narrative and Legislative Texts*, p. 442.

the Rule was authoritative for all new Cistercian communities. The focus on *caritas* in the *Carta Caritatis* then, gave it a force of law that it had not had previously. The idea of *caritas* became institutionalised within the constitution so that it became the overriding principle in the Cistercian programme of government⁸⁸.

The dissimilarities between the ideas of *caritas* in the Rule of Saint Benedict and the *Carta Caritatis* raises the question of how much the reforming monks at the New Monastery were actually returning to a pure observance of the Rule. While the Rule itself and its idea of *caritas* were used to establish a new community that followed foundational monastic precepts of austerity, poverty, simplicity and solitude, the Cistercian resolve to return to a strict observance was an ideal that in reality was not followed. The *Carta Caritatis* introduced a number of regulatory elements that did not exist in, or were even contrary, to the Rule. As a reforming monastery, the New Monastery had resolved to establish itself without the strict hierarchal control of Cluny and similar Orders. At the same time they needed to introduce a system of control so that their new movement did not fall apart as many reform communities already had through lack of discipline. As a result there were obvious compromises between a strict and pure observance of the Rule and the needs of a new Order within a reforming environment. The Cistercian focus on the ideal of *caritas* within the *Carta Caritatis* maintained the appearance that the Order was founded on the strict observance of the Rule in spite of the compromises. By utilising fraternal *caritas*, considered to be the highest spiritual virtue, in this way the integrity and reforming ideal of the Cistercian communities could not be questioned.

The use of fraternal *caritas* as a mechanism for central control in the growing communities was not a 'strict observance' of the Rule of Saint Benedict. While the *Carta Caritatis* insisted on the independence of each community and its abbot in accordance with the Rule, at the same time it imposed controls on this independence through the General Chapter and Visitation. The authority of the abbot was effectively restrained within his own community. He too was subject to the Rule as it was interpreted at the annual General Chapter. The *Carta Caritatis* imposed restrictive regulations in areas of authority that in the Rule of Saint Benedict had been left up to the abbot's discretion. Areas of daily life within the community that an abbot previously oversaw

⁸⁸ W. Eugene Goodrich, 'Caritas and Cistercian Uniformity: An Ideological Connection?' *Cistercian Studies*, 20:1 (1983), pp. 32-43.

such as the liturgy, clothing and food were all specifically regulated in detail by the charter and early statutes with the intention that they were to be practised uniformly throughout the whole Order 'that we may live by one charity, one Rule, and like usages [*sed una caritate, una Regula, similibusque vivamus moribus*]'⁸⁹. Although this over-regulation may have been designed to avoid the just as regulated material excesses of daily life and ritual as expressed by the monastic lifestyle of Cluny, it also meant that the Cistercian adherence to the Rule of Saint Benedict was not as pure as they themselves might have wished. This use of the idea of *caritas* as a means to regulate and control, linked to Saint Benedict's goal of *caritatem perfecta*, might appear to be a justification or manipulation of the Rule by the early Cistercians to validate their new regime. However, the Cistercians as a reform movement were structuring their new monastic order within a wider monastic and ecclesiastical environment that was some 600 years later than the environmental context within which Benedict wrote his Rule. The framework of the *Carta Caritatis* would enable fraternal *caritas* to prevail within the Order – fraternal *caritas* and the Rule as law had to combine for the new order to maintain its character. The Cistercian environment created by the *Carta Caritatis* encouraged and nurtured the development of fraternal *caritas* as an ideal, especially in terms of emotional and affectionate bonds within the community. It was this development of both the ideal and practice of fraternal *caritas* that in turn provided a framework for the growth in affectivity that pervaded the work of later 'second generation' Cistercians.

⁸⁹ Waddell, *Narrative and Legislative Texts*, p. 444.

Section 3.

Challenges to Cistercian *Caritas*

The *Carta Caritatis* had defined the new Cistercian community as one that was united in fraternal *caritas*. It had constructed a common monastic environment and uniform customs that would cultivate the practice of a uniform fraternal *caritas* based in principle on the Cistercian's own strict interpretation of the Rule of Saint Benedict. However, it was both the ideal and practice of this *caritas* and its exclusive nature which united them as a particular group that inevitably led to challenges. These challenges came from within the Order itself and also from outside. The internal challenge contested the very basis of Cistercian *caritas* itself – the ideas of unity and fraternity. The laybrothers who eventually raised this challenge were an incongruity in the Order that belied the Cistercian ideal of fraternal *caritas*. The external challenge came from Cluny – the bastion of traditional monasticism that the Cistercians had rejected. Cluny attacked the exclusive nature of Cistercian *caritas* and its strict interpretation of the Rule. Both of these challenges were played out over the twelfth century with varying degrees of intensity.

The *Exordium Parvum* related the introduction of the *conversi*, a new group of men within the Cistercian monastic community, but the *Carta Caritatis* did not mention them at all. The *conversi*, or laybrothers, were introduced to resolve labour problems that had arisen as the monastic communities acquired and expanded their agricultural holdings and activities while seeking economic self-sufficiency without the reliance upon and exploitation of serfs as at Cluny. Early recruits to the laybrothers were mostly men with skills in agricultural and horticultural fields and craftsmen such as cobblers, masons and blacksmiths, although there were obviously some noble or knightly recruits, as a statute in 1188 reveals. While not totally insisting that nobility refrain from becoming laybrothers, this statute preferred them to become monks⁹⁰. The Cistercians were not the first to incorporate laybrothers as a feature of their monastic structure – the laybrothers

⁹⁰ David H Williams, *The Cistercians in the Early Middle Ages*, Leominster: Gracewing, 1998, p. 80.

were already a recognised feature of other non-Cistercian reform communities, including Vallombrosa where Stephen Harding had visited. As the *Exordium Parvum* said:

They enacted a definition to receive, with their bishop's permission, bearded laybrothers, and to treat them as themselves in life and death – except that they may not become monks... for without the assistance of these they did not understand how they could fully observe the precepts of the Rule day and night; likewise to receive landed properties far from the haunts of men, and vineyards and meadows and woods and streams for operating mills (for their own use only) ... And since they had set up farmsteads for agricultural development in a number of different places, they decreed that the aforesaid laybrothers, and not monks, should be in charge of those dwellings, because, according to the Rule, monks should reside in their own cloister.⁹¹

These words from the *Exordium* were an expression of a number of institutes in the *Instituta Generalis Capituli*. *Capituli V* and *VI* established the granges under laybrother management which were to be no further off than a day's journey – presumably a day's journey on horseback, and also permit the monks to go there as often as they are sent but not to live there for any length of time as their proper dwelling place according to the Rule is the cloister⁹². *Capitula VIII 'De conversis'* said:

Work at granges is to be done by laybrothers and by hired hands. In any case, with the permission of the bishops, we receive these laybrothers as our family members and helpers under our care, just as we receive monks. We hold them as brothers and, equally with the monks, sharers in our goods, spiritual as well as temporal.⁹³

Other *Capituli* referred to both monks and laybrothers together and seemingly as equals – *Capitula XVI* discussed fugitive monks and laybrothers⁹⁴; *Capitula XLI* was about monks and laybrothers asking for nothing at other abbeys to which they are sent on business⁹⁵; and *Capitula LIV* prohibited both monks and laybrothers from selling abbey-produced wine in taverns⁹⁶. The ideas that the laybrothers were to be treated the same as monks in both life and death, and that they were equal to monks in terms of sharing both the material and spiritual benefits of the community implies that they were accepted in the same bonds of fraternal *caritas* that the community was founded on. While this bond of fraternal *caritas* may have been, by implication, the ideal, the practice was rather different.

⁹¹ Waddell, *Narrative and Legislative Texts*, p. 435.

⁹² *ibid.*, p. 459.

⁹³ *ibid.*, p. 460.

⁹⁴ *ibid.*, p. 463.

⁹⁵ *ibid.*, p. 475.

⁹⁶ *ibid.*, p. 480.

Both the *Ecclesiastica Officia* and the *Usus Conversorum*, or the Usages of the Cistercian Laybrothers, revealed the inequalities in practice which contradicted the ideal of *caritas*. The *Ecclesiastica Officia* recorded a number of examples where the laybrothers were either included in or excluded from the daily life of ritual within the monastic community. These references make it quite clear that the laybrothers lived on the margins of the monastic community and were only tacitly accepted as sharing in the same *caritas* as the *Instituta* had implied. The first reference in the *Ecclesiastica Officia* to laybrothers highlighted their exclusion from an important festival event in the liturgical calendar. It is stated that two laybrothers, under instructions from the cellarer, were to prepare a fire in the warming room for the monks to warm themselves between Vigils and the Midnight Mass on Christmas Eve⁹⁷. In fact, nowhere else in the prescriptions for the whole of the Advent and Christmas period to Epiphany were the laybrothers mentioned, while the prescriptions relating to other major festivals defined clearly their involvement. The liturgies for Palm Sunday, Maundy Thursday and Good Friday all include the laybrothers, although they never appeared fully involved, and they retained their status of marginality within the community. On Palm Sunday the blessed tree branches were distributed to the monks and novices, and then only if there were any remaining were they given to the laybrothers, other servants [*familia*] and guests⁹⁸. The *Ecclesiastica Officia* at this point placed the laybrothers clearly outside the fraternity of the monks and on the margins with the other servants and guests, although the laybrothers were included in the procession whereas the guests were not permitted to take part⁹⁹. The laybrothers were to follow last in this procession – the monks were first, followed by the abbot, then the novices and finally the lay brothers¹⁰⁰. The laybrothers were involved in similar processions on Candlemas and Ascension – processions which celebrated the fraternal nature of the community, and the ideal of fraternal *caritas*.

Elements of practice in the liturgies for Maundy Thursday and for Good Friday also maintained the impression of *caritas*. In the Maundy Thursday liturgy the laybrothers acted as escorts for the poor who were brought into the monastery cloister for the Mandatum for the Poor – the ritual foot-washing – and prepared the basins of hot water and the linen towels¹⁰¹. While it was the abbot and monks who did the actual foot washing, the laybrothers were also involved:

⁹⁷ *Ecclesiastica Officia*, Chap. 4: 1.

⁹⁸ *ibid.*, Chap. 17: 1-5.

⁹⁹ *ibid.*, Chap. 17: 25.

¹⁰⁰ *ibid.*, Chap. 17: 6-8.

¹⁰¹ *ibid.*, Chap. 21: 9-11.

In order that the laybrothers be included as joint fulfillers of this Holy Mandate, it is ever they who, with all competence and diligence, proffer the water and towels to the monks who are actually doing the Mandatum.¹⁰²

The laybrothers were included in the Grand Mandatum for the community later in the day, where the abbot and helpers washed the feet of the whole community assembled in their usual places in the church, the abbot himself washing only the feet of four monks, four novices and four laybrothers¹⁰³. The ritual inclusion of the laybrothers in the Grand Mandatum for the community demonstrated that the community paid lip service to the idea of fraternal *caritas*, but the normal weekly Saturday Mandatum, as prescribed by the Rule of Saint Benedict¹⁰⁴, seemed again to exclude the laybrothers. The Good Friday liturgy also showed an ambivalent attitude to the laybrothers. Fraternal *caritas* appeared to be expressed in the way they were included in the community act within the choir of the Adoration of the Cross, while the guests and other servants had to complete their adoration outside the church¹⁰⁵. However, once this service was completed the laybrothers were then dismissed to clean the church after Vespers while the monks had their meal, and then to clean the cloister and the chapter room after Compline¹⁰⁶. This cleaning involved removing from the floor the thick matting of straw which had served as insulation during the winter months. Similar examples of this ambivalence appeared in liturgical instructions regarding the Blessing of Holy Water and Receiving the Pax.

The *Ecclesiastica Officia* prescribed not only the liturgical year within the abbey community, but also gave instructions for the monastic day. Particular instructions were laid down for the interaction of monks with laybrothers, especially for monks going to the granges to help at the seasons of mowing and harvesting. They were to maintain their silence at all times, and were to beware of using sign language with laybrothers. They were also to maintain the custom they normally followed within the abbey and 'no one should overstep the established bounds without permission'¹⁰⁷. The third part of the *Ecclesiastica Officia* gave instruction regarding the various duties and roles of monastic personnel. The Cellarer was given particular responsibility for overseeing the laybrothers and it was his role to see that they attended to the various duties required of them. He also oversaw the candidates to the laybrotherhood – he led the candidates to become laybrother novices into Chapter, and also again a year later after their probation for

¹⁰² *Ecclesiastica Officia*, Chap. 21: 13.

¹⁰³ *ibid.*, Chap. 21: 31-34.

¹⁰⁴ Benedict, *RB1980*, p. 233.

¹⁰⁵ *Ecclesiastica Officia*, Chap. 22: 18-20.

¹⁰⁶ *ibid.*, Chap. 21: 35-38.

¹⁰⁷ *ibid.*, Chap. 84: 23-31.

them to make their profession. These instructions ensured that the laybrothers were always held at a distance from the core of the community – the monks themselves. This minimal contact was maintained in the usages for the laybrothers – the *Usus Conversorum*.

The probable author of the *Usus Conversorum* was Stephen Harding who would have written it in the early 1120s¹⁰⁸. Waddell argues that only one person was qualified enough to be able to write both the *Usus Conversorum* and the *Ecclesiastica Officia* – Stephen Harding. Stephen took his fellow Cistercian abbots to task in the Prologue of this document for their exploitation of the laybrothers and cites this as his purpose for writing the *Usus Conversorum* just as they had to write the *Ecclesiastica Officia*, 'so that unity may be everywhere preserved' and so 'that diversity may not be found in their way of life'¹⁰⁹. Stephen wrote:

Since it is clear that we have received from bishops the care of souls of laybrothers equally as of monks, I am amazed that certain of our abbots devote indeed all due diligence to the monks, but none or very little to the laybrothers. Some, holding them in contempt because of their innate simplicity, think that material food and clothing are to be provided to them more sparingly than for monks, but that they are nevertheless imperiously to be made to do forced labour. Others, on the contrary, giving in to their murmuring more than is expedient for souls, indulge bodies the better to get more work if they treat them with greater indulgence as regards food, and greater laxity as regards clothing. And thus in one way or another, they both require work and gloss over faults; and while they studiously expend that care which is of slight avail, and do almost nothing to provide for that which is of the utmost avail, they openly show that what they seek from the society of laybrothers is their own interests, not those of Jesus Christ. In a word, if they too have been bought with the same great price, why should they be cared for any differently – those who, it is clear, are equals in the grace of redemption?¹¹⁰

The *Usus Conversorum* set out to define clearly the boundaries within which the laybrothers were to live their lives in order to maintain unity, or to maintain, as in the Cistercians' implied definition of unity, *caritas*. While the Prologue maintained the ideal of fraternal *caritas*, the main regulations of the customary once again portrayed that in practice the idea was hard to achieve, especially

¹⁰⁸ Chrysogonus Waddell, *Cistercian Lay Brothers: Twelfth-Century Usages with Related Texts*, Cîteaux: Commentarii cistercienses, 2000, pp. 20-21.

¹⁰⁹ *ibid.*, p. 165.

¹¹⁰ *ibid.*, pp. 164-165.

between two distinct groups with separately defined roles within the community. The regulations maintained the sharp divide between monk and laybrother that the *Ecclesiastica Officia* had already established, and also established some concessions in consideration of the hard manual labour that was required of the laybrother. The customary outlined the Office and Hours for the laybrothers establishing a much shorter worship regime both in the grange and in their own choir of the abbey church. The laybrothers were permitted to remain asleep until after Vigils, but they attended Lauds and Prime before going to work. The customary said:

They do not go to church for the other Day Hours; instead they make their prayers wherever they happen to be working... On Sundays, however, and on other days when they do not work, in winter as well as summer, they rise for Vigils when the monks do... [and they] do not leave, but listen to the entire service.¹¹¹

Prayers such as the *Pater noster*, the *Credo in Deum*, and the *Miserere mei, Deus* had to be learned by heart as the laybrothers were not permitted to have books – they were considered to be illiterate, for to be literate might identify a laybrother with the literacy of the monks¹¹². The laybrothers were expected to communicate 12 times a year¹¹³ in contrast to the monks who were expected to communicate not only on the feast days of Christmas, Holy Thursday, Easter and Pentecost but also every Sunday¹¹⁴. As with the monks, the laybrothers were expected to keep silence apart from what was necessary for the efficient completion of their work, and to give directions to lost travellers¹¹⁵. The penitential structures for laybrothers and monks were defined differently with a more rigid system in place for the laybrothers who attended their own regular discipline every Friday quite separate from their usual Sunday Chapter¹¹⁶ – the discipline for monks was held within Chapter and only as required¹¹⁷. These prescriptions that regulated the spiritual life of the laybrothers demonstrated the sharp division between the two groups in the monastic community who were exemplified as living together in the unity of fraternal *caritas*.

Physical conditions for the laybrothers prescribed by the *Usus Conversorum* also maintained the division. Some concessions were given due to the heavy work load of the laybrothers in terms of diet, but other aspects of their daily life were marked by an austerity that surpassed even that of

¹¹¹ Waddell, *Cistercian Lay Brothers*, p. 169.

¹¹² *ibid.*, p. 182.

¹¹³ *ibid.*, pp. 175-176.

¹¹⁴ *Ecclesiastica Officia*, Chap. 66: 1-2.

¹¹⁵ Waddell, *Cistercian Lay Brothers*, pp. 177-178.

¹¹⁶ *ibid.*, p. 182.

¹¹⁷ *Ecclesiastica Officia*, Chap. 70: 69-76.

the monks. Food was the same as for the monks except that laybrothers were generally allowed *mixt*, or breakfast, consisting of a half pound of bread and water, not wine as the monks had if they were permitted to have *mixt*, while those at the granges were given a pound of bread and then as much coarser bread as was necessary. Fasting was also moderated for those at the granges¹¹⁸. Clothing was a different issue altogether. Laybrothers were expected to wear clothing that was made of animal skins or a type of leather which could be lined with old second hand cloth. Also permitted were a cloak, a hood covering shoulders and chest only, and various shoes for different working conditions with discretion for the abbot to provide more for those working in situations exposed to the elements¹¹⁹. The abbot also had discretion to provide laybrothers with second-hand boots to be worn, as did the monks, for Vigils at the abbey if he wished, but this was not normal practice¹²⁰. The Usages also regulated the bedding for laybrothers – they had similar mattresses to the monks, but could only use animal skins for coverings¹²¹, rather than the woollen blankets and coverings of the monks. These strictures and their interpretation by individual abbots were to become a divisive issue in spite of the admonishments in Stephen's Prologue to the *Usus Conversorum* for the laybrothers to be recognised as equal members of the monastic community and sharers of fraternal *caritas*.

The laybrothers' sense of injustice at their exploitation and the reality of their inequality led to increasing tensions within the monastic community, often criticised by those inside and outside the monastic life. Walter Map criticised the Cistercians for exploiting the laybrothers by using them 'for the basest and most menial cares, or for women's work, such as milking and so on'¹²², while Hildegard of Bingen criticises the laybrothers themselves in her observation of the laybrothers at Eberbach that 'very many do not convert themselves to God in their habits because they love perversity rather than uprightness... most of them labour neither day or night since they serve perfectly neither God nor the world'¹²³. These tensions ultimately led to the first recorded revolt of what was to become a long series of revolts. A number of writers recorded the account of what became known as the Boot Uprising at Schönaue in 1168 first recorded in the *Exordium Magnum* by Conrad of Eberbach. A newly appointed abbot had decided to stop the practice of the previous abbot of issuing new boots to the laybrothers on Christmas Eve – a concession to the laybrothers of what was normally a special consideration reserved for monks only. The

¹¹⁸ Waddell, *Cistercian Lay Brothers*, p. 188.

¹¹⁹ *ibid.*, p. 189.

¹²⁰ *ibid.*, p. 191.

¹²¹ *ibid.*, p. 190.

¹²² James France, *The Cistercians in Medieval Art*, Stroud: Sutton, 1998, p. 131.

¹²³ *ibid.*, p. 131.

laybrothers, their numbers swelled by those returning from the granges for the Christmas services, plotted to enter the monks' dormitory and slash the monks' new boots to pieces on account of their claim that their 'arduous and hard work was intolerable'¹²⁴ while the monks were busy chanting the First Vespers of Christmas. The plot failed because of the death of one of the plotting laybrothers, apparently caused by divine intervention due to the abbot's prayers. The account of the uprising by Conrad was an attempt to discourage disobedience amongst the laybrothers, but it also indicates the deepening rift between them and the monks whose own vision of their community tended to elitism instead of the unity of fraternal *caritas*.

The growing number of laybrother uprisings – twenty are recorded between 1168 and 1200¹²⁵ – may account for the appearance in the late twelfth and early thirteenth centuries of a large number of *exemplum* that praised the simplicity, humility and obedience of the laybrothers. These *exempla* could be seen as an exercise in damage control by abbots and monks seeking to rehabilitate and reintegrate the laybrothers into the Cistercian vision and ideal of unity and *caritas*. McGuire relates two stories from different sources that attempt to elevate the experience of the laybrothers and emphasise their involvement in the monastic liturgy. Caesarius of Heisterbach recorded the story about a laybrother who wished to go to the abbey for communion on a feast day but was not given permission. However when the others returned to the grange from the abbey, the laybrother, to whom everything that had happened at the abbey had been divinely revealed, was able to tell them all the details of the liturgy and who had been involved in readings and responses. Another similar story is recorded by Conrad of Eberbach where the laybrother is denied permission to attend on the feast of the Assumption, but was ordered instead to look after the sheep. As he was within hearing distance of the abbey, when he heard the bell for matins he began to recite the Ave and repeated it on through the night as he didn't know any other prayers. His simple devotion so pleased Mary that she revealed it to the abbot, Bernard of Clairvaux, who constructed a sermon for the monks about the laybrother's obedience and piety¹²⁶. Another story written by Conrad and related by France tells about Bernard attending a dying laybrother. Bernard encouraged him but then realising that the laybrother was exceedingly confident, upbraided him with the words 'Are you not that miserable wretch who, leaving the world more from necessity than from the fear of God, at length obtained admission? Poor and miserable as you were, I took you in, fed and clothed you... even made you a brother to the wise and noble

¹²⁴ Berman, p. 105.

¹²⁵ France, p. 132.

¹²⁶ Brian Patrick McGuire, *Friendship and Faith: Cistercian Men, Women, and their Stories, 1100-1250*, Aldershot: Ashgate Publishing Ltd, 2002, p. 1: 278.

amongst us'. The laybrother replied that he had learnt from Bernard himself 'that the kingdom of God cannot be acquired by nobility of blood or earthly riches, but solely by the virtue of obedience'. Bernard, of course, was overjoyed with the laybrother's response and once again used the laybrother as an example of obedience and piety in a later sermon¹²⁷. Other stories emphasise the laybrothers' work – Newman gives examples of Jesus appearing and helping laybrothers in their work¹²⁸. Another story related by Newman records a dying laybrother's vision of Jesus and his apostles, 'the ultimate symbol of fraternal love'¹²⁹. These stories attempted to soften the divide between monk and laybrother and to redefine their relationship in fraternal *caritas*. For the laybrother they were intended to be inclusive in terms of sharing the spiritual advantages and blessings similar to the monk, and their common salvation. For the monk they were an attempt to resolve the disharmony and growing hostility of the laybrother to what was perceived by the laybrother as exploitation by an elite core of the community. This internal challenge to the Cistercian idea of *caritas* was never fully resolved, and ultimately defined their idea of fraternal *caritas* as exclusively for monks alone. Even though they justified the unity of their communities by *caritas*, they were ultimately divided according to merit. As Bernard of Clairvaux said 'all the saints will shine like the sun in their father's kingdom, yet because of differences in merit, some will shine more than others'¹³⁰.

Challenges to the Cistercian idea of *caritas* did not come only from within their communities, but from outside as well. The controversy between Bernard of Clairvaux and Peter the Venerable of Cluny, while based in arguments about observance of the Rule of Saint Benedict, was in truth a confrontation about ideas of *caritas*. The context of the controversy appeared to have its roots in a conflict within Cluny itself during the abbacy before that of Peter the Venerable – the abbacy of Abbot Pons¹³¹. Abbot Pons of Melgueil succeeded to the abbacy of Cluny in 1109. It appeared the new abbot was intent on a programme of reform to bring Cluniac practice into line with the new reformed monastic practice. Although he had a number of supporters for his programme, the opposition also had considerable strength. The entrenched customs of Cluny had become over time far more revered than the Rule itself and any threat to the lifestyle and observance of the Cluniac monks was resisted. Pons was faced with economic difficulties due to the expense of

¹²⁷ France, p. 138.

¹²⁸ Newman, p. 104.

¹²⁹ *ibid.*, p. 104.

¹³⁰ Bernard of Clairvaux, *Cistercians and Cluniacs: St Bernard's Apologia to Abbot William*, Kalamazoo: Cistercian Publications, 1970, p. 44.

¹³¹ Bredero, Adriaan H, *Bernard of Clairvaux: Between Cult and History*, Edinburgh: T & T Clark, 1996, pp. 218-220.

building a new massive abbey and a fall off in revenue to fund it. His solution was to utilise neglected abbey lands for agriculture and return to the Rule's prescriptions regarding manual labour¹³². Following complaints to the Pope, Pons was forced to abdicate, and the abbacy was taken up by Peter the Venerable who upheld the traditional customs and ideals of Cluny and sought to repair the damage done by his predecessor, although further attempts by the Pons supporters to disrupt the traditional life of Cluny and maintain the reform ideals continued. It was within this context that Bernard of Clairvaux intervened, firstly with his open letter to his nephew who had left Clairvaux for Cluny, and then with his satirical *Apologia* written at the instigation of William of Saint Thierry, a reformist Benedictine monk who eventually became the Cistercian abbot at Saint Thierry. Peter the Venerable responded to Bernard's attacks with two lengthy open letters to him, the first containing a summary of Cistercian criticisms of Cluny. The sequence of these documents has been disputed by a number of historians¹³³, some placing Bernard's letter earlier than the other documents, and others placing the first of Peter's letters as earliest. Whatever the dating sequence may have been, this study will focus initially on the Cistercian documents and then on the letters of Peter the Venerable.

The letter that Bernard of Clairvaux wrote to his nephew Robert of Châtillon appears to have been the spark that ignited the debate between Cistercian and Cluniac. Bernard uses the letter to redefine Cistercian practices and customs in opposition to the practices and customs of Cluny and in doing so he accentuates the differences between Cistercian monks and all others. By exposing Cluniac practices as lax and self-indulgent, he implicitly redefines the austerity and poverty of Cistercian practice within the wider context of the Cistercian ideal of fraternal *caritas*. Although addressed personally to Robert, the letter, because of its polemical nature, was always intended for a much wider audience than just one person. Robert had either accompanied or followed Bernard into the monastic life at Clairvaux and had become a Cistercian monk, although when he was still a child his parents had made a promise to Cluny that he would take up his vows there. Robert soon found the austerity of Cistercian living and Bernard's harshness not to his liking. While Bernard was away from Clairvaux, he was persuaded by a visit from the Grand Prior of Cluny to leave the austerities of Clairvaux for the easier life at Cluny. Bernard, on his return, wrote to Robert in an attempt to persuade him to return to Clairvaux, but also used the letter to attack scathingly the customs of Cluny in comparison with the customs of Cîteaux. Bernard began his letter expressing his regrets over his nephew's departure, and his grief that he will not

¹³² Bredero, p. 220.

¹³³ Giles Constable, *The Letters of Peter the Venerable, Vol. II*, Cambridge, Mass: Harvard University Press, 1967, pp. 270-274.

return to Clairvaux. While he accepted that he must take some of the blame in the matter for being to harsh, he also assured Robert that if he changed his mind and returned, he too would change his own attitude and not blame him – he said that ‘who else would not scold your disobedience and be angry at your desertion, that you should have left the coarse habit for soft raiment, a fare of roots for delicacies, in fine poverty for riches’¹³⁴. Ultimately, he laid the blame with the deceit of Cluny and the Grand Prior who ‘outwardly came in sheep’s clothing, but within he was a ravening wolf’¹³⁵. Robert, he said: ‘was duped by sanctity, misled by religion, [and] allured by the authority of age’¹³⁶. The Grand Prior had arrived preaching ‘a new Gospel’ – a gospel that, according to Bernard, deceived and divided. Eventually Robert:

... was brought to Cluny and trimmed, shaved and washed. He was taken out of his rough, threadbare, and soiled habit, and clothed with a neat and new one. Then with what honour, triumph and respect was he received into the community! He was set up on high and, although a mere youth, was allocated to a position above many who were his seniors. He was befriended, flattered and congratulated by the whole fraternity. Everyone made merry over him as though they were victors dividing the booty. O good Jesu, what a lot of trouble was taken for the ruin of one poor little soul!¹³⁷

Bernard used his letter and the defection of Robert to attack the differences between the customs of Cluny and the Cistercians. They ‘commended feasting and condemned fasting... called voluntary poverty wretched and poured scorn upon fasts, vigils, silence and manual labour... called sloth contemplation... gluttony, talkativeness, curiosity and all intemperance [were] commended as discretion’¹³⁸. Further on in the letter he again attacked Cluniac customs:

Does salvation rest rather in soft raiment and high living than in frugal fare and moderate clothing? If warm and comfortable furs, if fine and precious cloth, if long sleeves and ample hoods, if dainty coverlets and soft woollen shirts make a saint, why do I delay and not follow you at once? But these things are comforts for the weak, not the arms of fighting men. They who wear soft raiment are in king’s houses. Wine and white bread, honey-wine and pittances, benefit the body not the soul. The soul is not fattened out of frying pans! Many monks in Egypt served God for a long time without fish. Pepper, ginger, cumin, sage, and all the thousand other spices may please the palate

¹³⁴ Bernard of Clairvaux, *The Letters of St Bernard of Clairvaux*, trans. Bruno Scott James, Kalamazoo: Cistercian Publications, 1998, p. 3.

¹³⁵ *ibid.*, p. 3.

¹³⁶ *ibid.*, p. 3.

¹³⁷ *ibid.*, p. 4.

¹³⁸ *ibid.*, p. 4.

but they inflame lust... Salt with hunger is seasoning enough for a man living soberly and wise.¹³⁹

Bernard's defence of Cistercian customs continued the theme as he challenged Robert to return to the Cistercian fold. Advising him to return to a life of hard work rather than idleness he said:

If you act thus you will soon find that you only need to eat what will satisfy your hunger, not what will make your mouth water. Hard work will restore the flavour to food that idleness has taken away. Vegetables, beans, roots, and bread and water may be poor fare for one living at his ease, but hard work soon makes them taste delicious. You have become unaccustomed to our clothes and now you dread them as too cold in winter and too hot in summer. If we spend well all the night enjoined by the Rule in psalmody, it will be a hard bed on which we cannot sleep.¹⁴⁰

This open letter, then, with its criticisms and defences, ignited the often fiery debate between Cistercian and Cluniac, reformed monasticism and traditional monasticism, and even more specifically, between Bernard and Peter, throughout the twelfth century. These challenges to custom and interpretation of the Rule were challenges to the very ideal of Cistercian *caritas* itself, challenges that Bernard took up again in his *Apologia*.

Bernard's second polemic work against Cluny was his treatise *Apologia ad Guillelmum abbatem*, or Apology for Abbot William, and was written specifically at the request of William of Saint Thierry. William, a reforming Benedictine abbot who eventually became a Cistercian, was keen to refute the allegations that the Cistercians were denigrating the Cluniac way of life, but at the same time not to appear to be condoning their current lack of discipline in practice, so he approached Bernard to compose a tract that would achieve both objectives – 'a few words spoken in a spirit of conciliation'¹⁴¹. The result was a two part satirical and polemic work using forms of classical rhetoric, but it was also a humorous caricature designed to wound as well as to amuse. He firstly denigrated the Cistercians for their sin of pride and lack of *caritas* in criticising the customs of Cluny, but then, having addressed the Cistercians regarding their own morality, he felt morally obliged to point out the abuses of Cluny that showed it was faithful to neither the letter nor the spirit of the Rule of Saint Benedict. Bernard said to the Cistercians that he had:

... a point at issue here with certain members of our Order who are said to be running down other orders and trying to establish their own righteousness

¹³⁹ Bernard of Clairvaux, *Letters*, p. 8.

¹⁴⁰ *ibid.*, p. 8.

¹⁴¹ Pauline Matarasso, *The Cistercian World: Monastic Writings of the Twelfth Century*, Harmondsworth: Penguin, 1993, p. 57.

instead of submitting to the righteousness of God... and so to you, brothers, who trust in your own righteousness and look down on others, even after having heard the Lord's parable of the Pharisee and the publican, to you I say this: I have heard it said that you are boasting that you alone among men are righteous, or at least holier than the rest, that you are the only monks to live according to the Rule...¹⁴²

In what might be a Cistercian response to these accusations Bernard wrote:

You reply, what about those who wear furs, who eat meat or animal fat when in perfect health, and three or four cooked dishes a day, all of which things the Rule forbids; who don't do the manual work that it prescribes; and who alter this, add that or subtract the other as they see fit – in what way are they keeping the Rule? These things exist; there's no denying it. But give heed to the rule of God with which St Benedict's is certainly not at odds. "The kingdom of God is within you", that is to say, not in outward things like clothing and food for the body, but in the virtues of the inner man.¹⁴³

Bernard went on to reprove Cistercian pride in their own virtuous austerity – 'when you run down your brothers while vaunting your own virtue, you lose humility, and charity [*caritas*] when you trample them in the dust, both without doubt among the higher gifts'¹⁴⁴. In finishing this first part of his treatise Bernard said to William that he had now not only rebuked his own monks for their criticism of his Order, but had also cleared himself of any suspicion as well.

Still addressing William, he immediately made a transition into his second purpose for writing the *Apologia* – to expose the abuses of Cluny – with the words:

I feel bound to add a few remarks. Because I give our own men no quarter, I might seem to condone the behaviour of certain monks of yours – conduct which I know you disapprove of, and which all good monks must necessarily avoid. I refer to abuses that, if they exist in the Order, God forbid should ever be a part of it.¹⁴⁵

He argued that in attacking the vices of and abuses by the men of the Order he was not attacking the Order itself, and therefore had the overall good of the Order of Cluny at heart, contending that in doing so he supported the Gregorian response that it is 'better that scandal erupt than the truth be abandoned'¹⁴⁶. Bernard's handling of Cluniac abuses of the Rule were presented in scathing caricature – course after course of elaborate and exotic foods that tempted the eye and more

¹⁴² Matarasso, p. 44.

¹⁴³ *ibid.*, p. 45.

¹⁴⁴ *ibid.*, p. 47.

¹⁴⁵ *ibid.*, p. 48.

¹⁴⁶ *ibid.*, p. 48.

than satiated the body; drunkenness that interfered with a monk's capacity to properly fulfil liturgical commitments, especially Vigils; the absurdity of the healthy and strong who feigned illness to gain the benefits of eating meat in the infirmary as prescribed in the Rule; clothes that were more to do with cutting a fashionable and refined figure than pure serviceability; and the extravagance of architecture and decoration in monastic churches. However, it was not only the monks that were criticised. Bernard took to task the abbots for allowing such behaviour, but then admitted that 'it is only human nature to be lenient in respect of liberties that one allows oneself'¹⁴⁷. Then to support this allegation he cited the example of a solitary abbot and his entourage of servants travelling 'with sixty horses and more in his train', and 'cannot go a dozen miles from home without transporting all his household goods... napery, cups, dishes and candlesticks have to be taken along, together with packs stuffed full... with ornate quilts'¹⁴⁸.

Bernard argued that for Cluny it was all of this that went by the name of *caritas*. But he said that it was indeed this very Cluniac abuse of discretion regarding the Rule that extinguished *caritas*:

By such charity [*caritas*] is charity [*caritatem*] destroyed, and this discretion mocks the very word. It is a cruel mercy that kills the soul while cherishing the body. And what sort of charity [*caritas*] is it that cares for the flesh and neglects the spirit?¹⁴⁹

These challenges to the Cluniac definition of *caritas* as well as the defence of Cistercian *caritas* lie at the heart of the *Apologia*. Bernard claims that it was the Cluniac idea of *caritas* that gave licence to intemperance by using the Rule of Saint Benedict with so much discretion that neither the letter nor the spirit of the Rule was being followed. The ideal of Cluny's *caritas* was, for Bernard, an ideal only of permissive tolerance and lack of discipline. Then to give emphasis to the Cistercian ideal of true *caritas* Bernard quoted in the *Apologia* the story of two early monastics from the time of Saint Anthony – one paid a visit to the other and they became so caught up in the spiritual benefits they received from each other that they easily paid little regard to physical needs. And so Bernard explained that 'this was the right order of precedence – to give priority to what is nobler in man's make-up; this was real discretion – making greater provision for the more important part; this indeed true charity [*caritas*] – to tend with loving care the souls for love of whom Christ died'¹⁵⁰.

¹⁴⁷ Matarasso, p. 54.

¹⁴⁸ *ibid.*, p. 55.

¹⁴⁹ *ibid.*, p. 50.

¹⁵⁰ *ibid.*, p. 50.

The first letter that Peter the Venerable, abbot of Cluny, wrote to Bernard of Clairvaux cannot be accurately dated and therefore cannot be verified as an authentic or specific response to either Bernard's letter to Robert or his *Apologia*¹⁵¹. However, the fact that Peter's letter was addressed specifically to Bernard at Clairvaux, and not to his equal as abbot at the head of the Cluniac Order, Stephen Harding at Cîteaux, is an indication that Peter had either read some of Bernard's polemic work, or that Bernard himself had emerged as the most central figure in terms of the Cistercian attacks on Cluny. Peter's letter, although not specifically a response to Bernard's work, was a defensive response to the claims of the Cistercian anti-Cluniac movement as a whole. The main focus of the letter was a list of twenty main accusations against Cluny and then a response to them in a lengthy apologetic of the Cluniac ideal. Peter defended a number of important issues in these accusations such as the prescribed year of novitiate, clothing, food and manual labour – all issues that correspond with Bernard's agenda. Peter's replies, however, lacked the conviction of Bernard. Regarding the novitiate year, Peter argued that the Cluniac practice of admitting a novice within a much shorter period of months, sometimes even days, aligns with the biblical practice of Jesus requesting people to follow Him without delay¹⁵². Regarding clothing Peter justified Cluny's furs and extravagant clothing by arguing that Saint Benedict allowed that an abbot's discretion could take into account local climatic conditions; regarding food Peter turned the issue back onto the Cistercians with the retort that if the Rule allowed only two cooked vegetables through consideration of the weak, then surely the Cistercians should have a choice of three or four! Peter also argued that in terms of manual labour that the spirit rather than the letter of the Rule was more important – because of the full liturgical day Cluniac monks were not idle, and furthermore agricultural work was unsuitable for choir monks. Peter's most obvious grievance was against the attitude of the Cistercians – 'O new race of Pharisees brought back to the world, dividing themselves from others, preferring themselves to all the rest!'¹⁵³ He went on to accuse the Cistercians of boasting that they keep the Rule to the letter, but seemed to have forgotten all about the Rule's chapter on humility¹⁵⁴.

At the centre of Peter's argument was the Cluniac concept that the Rule of Saint Benedict could be relaxed or modified in order to keep the greater rule of *caritas*. For Peter, *caritas* was the

¹⁵¹ Constable, *Vol. II*, pp. 270-274.

¹⁵² M. D. Knowles, *Cistercians and Cluniacs: The Controversy between St. Bernard and Peter the Venerable*, Oxford: Oxford University Press, 1955, p. 15.

¹⁵³ Constable, *Vol. I*, p. 57.

¹⁵⁴ Knowles, p. 15.

issue at stake. Cluny's customs were defended as properly relying on the abbot's discretion and his interpretation of the divine law of *caritas* and not a rigid interpretation of *caritas* as it was defined by the Cistercians and their General Chapter. The ideal of Cluny allowed for the modification of custom according to the situation and needs of the moment, but at the same time sought to maintain the ideal of *caritas* which was the essence of the Rule of Saint Benedict and the greater rule of God. Precepts of the Rule could be modified by the abbot as long as the modifications preserved *caritas*. Peter thought that the Cistercian ideal of *caritas* created an ascetic community that was exclusive and hypocritical – it was in fact a false *caritas* as it disturbed the unity and equality of all monks from every order. As he scathingly indicts:

But you, you alone in all the world are truly holy monks; all others are false and ruined. You alone are established following the interpretation of the Rule, yet you wear a habit of insolent colour; and by displaying a splendour among the black, you distinguish yourself from other monks.¹⁵⁵

For Peter the Rule itself could be moderated or even disregarded whenever that moderation could be justified by *caritas* – 'what is the duty of *caritas*? The only purpose of *caritas* is to seek man's salvation by any means possible... so, in order to act in the best interests of salvation *caritas* does what it wishes. Now if it is allowed to do what it wishes, it can also make and change the Rule'¹⁵⁶.

Further letters between Peter and Bernard justifying their own positions kept the debate between Cluny and the Cistercians alive. Peter, in particular, persisted with many complaints against the Cistercians and their actions, often claiming a lack of *caritas*. His insistence that all monks were united by *caritas* as one family and Bernard's apparent unwillingness to adhere to this principle of monastic equality produced continued tensions. Bernard's opposition to Peter's candidate in the election for the see of Langres in 1138 caused considerable friction when Peter accused Bernard of relying on cathedral rumour rather than reports from monks – members of one family united in *caritas* who should love and support one another. Even later, in 1149, he again took Bernard to task regarding the exclusive nature of Cistercian *caritas*. This time he focused on the Cistercian practice of not allowing monks of other Orders – 'those monks whom the same faith and charity [*caritas*] ought truly to make brothers'¹⁵⁷ – into Cistercian cloisters. Peter's idea of *caritas* was perhaps best summed up in this quote from a letter to Bernard:

¹⁵⁵ Constable, *Vol. I*, p.57.

¹⁵⁶ *ibid.*, p. 98.

¹⁵⁷ *ibid.*, p. 371.

Caritas, derived from the highest unity, repairs corruption, reintegrates schisms, unifies divisions, unifies all. So it is clearly proper that for those for whom there is one Lord, one faith, one baptism, whom one church contains and one eternal and blessed life awaits, there should be for them, as according to Scripture, one heart and one soul.¹⁵⁸

For Bernard, as long the Rule upheld and served the idea of *caritas*, it could not be moderated in any way:

These rules were devised or ordained, not because it is unlawful to live in a different manner, but because this manner of life was found to be expedient for the gaining or the preservation of charity [*caritas*]. So long as they serve this end, they stand fixed and immutable and cannot licitly be changed, even by superiors.¹⁵⁹

Although Bernard and Peter often seem to have been using similar language and arguments, their ideas about *caritas* and the Rule were different. For Bernard *caritas* was the unchangeable principle that upheld the unity of the Cistercian way of life. Cistercian *caritas* was, in Bernard's view, the true *caritas*. While it appears that Bernard acknowledged that some changes to the Rule may be acceptable in some circumstances and that the Cluniac interpretation of the Rule may have some basic legitimacy¹⁶⁰, Bernard viewed the unity of the monastic world differently from Peter. He saw the different Orders and their roles as diverse, and in that diversity there was unity 'in the singleness of love [*caritas*]', but not the equality that Peter envisioned. It was this diversity that, according to Bernard, would determine the hierarchy of heaven – 'Here below diversity resides in the differences of orders and the various allotments of work; in heaven diversity will take the form of an obvious and well-ordered gradation of merit'¹⁶¹. A few lines further on Bernard summarises the Cistercian position with these words – ' "star differs from star" says St Paul "and so will it be at the resurrection of the dead." All the saints will shine like the sun in their Father's kingdom, yet because of difference in merit, some will shine more than others'¹⁶². Even the unity of Peter's 'one eternal and blessed life' that waited for all in heaven was different for Bernard. His vision of heaven was one where the Cistercians would have a superior position because of their higher and stricter life that adhered to true *caritas* and the authentic practise of the Rule.

¹⁵⁸ Constable, *Vol. I*, p. 294.

¹⁵⁹ Bernard of Clairvaux, *On Precept and Dispensation*, p. 108.

¹⁶⁰ Bernard of Clairvaux, *Apologia*, pp. 50-51.

¹⁶¹ *ibid.*, pp. 43-44.

¹⁶² *ibid.*, p. 44.

The Cluniac concept of *caritas* expressed in the letters of Peter the Venerable represented a significant challenge to the Cistercian idea of *caritas*. Cluniac ideas of *caritas* as a flexible agent for reinterpretation and change and as a model for monastic unity challenged Cistercian ideas of *caritas* as the agent for austere and rigid adherence to the Rule and monastic superiority and exclusivity. In spite of the challenge Bernard remained firm in his adherence to the Cistercian ideal of *caritas*, eventually seeing Peter introduce a number of reforms at Cluny in response to some of the claims made in the *Apologia*. Over time the personal relationship between Bernard and Peter also seemed to mellow. Many scholars have focused on what may be seen as a developing *amicitia* between the two abbots, although there are some questions as to how genuine the friendship was. Whatever way their *amicitia* was expressed it would always be limited by their basic disagreement over a fundamental principle – *caritas*. Much of Peter's later writing contained expressions of endearment such as:

... so it is always something sweet for us to speak with you, and to keep a honeyed sweetness between us in our love [*caritatis*] through our talks.¹⁶³

Bernard's responses in his letters leave no doubt that a mutual respect had grown between them. His responses to Peter included similar, although often more restrained expressions:

Would that I were able to express in this letter all that I feel towards you! Then you would certainly see clearly the love for you which God has inscribed upon my heart and engraved upon my bones... For a long time now we have been united in the closest friendship, and an equal affection has rendered us equals.¹⁶⁴

Although most scholars agree that there was a late developing mutual regard between Bernard and Peter, they differ as to the depth and genuineness of the friendship. McGuire regards the friendship as 'a real friendship, with moments of hope, anger, trust, fear and mutual need'¹⁶⁵, and states that Peter always places the Cluniac-Cistercian disagreement in the context of the personal bond with Bernard. Others, such as Bredero, regard the language as the more formal *amicitia* of diplomacy due to the open nature of letters at that time – private correspondence did not exist. He wrote that:

... in view of the fact that Peter and Bernard were constantly involved in this unsavoury conflict of interests between the two monasteries, we must probably see these friendly letters that they exchanged, and that failed to resolve the ongoing controversy between the two orders, as an interchange of diplomatic compliments rather than as expressions of genuine, personal friendship that bound them together.¹⁶⁶

¹⁶³ Constable, *Vol. I*, p. 276.

¹⁶⁴ Bernard of Clairvaux, *Letters*, p.378.

¹⁶⁵ McGuire, *Friendship and Community*, p. 253.

¹⁶⁶ Bredero, p. 233.

Others, such as Newman consider the friendship to be largely a one-sided relationship with only tacit involvement and acknowledgement by Bernard because of his intolerance of the Cluniac position regarding *caritas*. Newman implies that Peter's appeals and approaches of *amicitia* could be regarded as manipulative tactics as part of his argument for a monastic world of unity and equality¹⁶⁷. Knight considers the letters as literary constructions where the language of friendship is largely fictionalised and manipulatory rhetoric¹⁶⁸. Whether the letters reflected a genuine *amicitia* between Bernard and Peter or whether they are the diplomatic rhetoric of a formalised and conventional *amicitia* is difficult to decide. Given the early enmity between the two abbots, and their basic disagreement over the fundamental idea of *caritas*, there is much to be said for the idea that the later letters are a diplomatic attempt by Peter to modify Bernard's attitude and opinions by appealing not only to the idea and practise of *amicitia*, but also to the idea of *caritas* itself. There is no doubt that their conflict over *caritas* as an ideal of the monastic community, especially in terms of the Rule, was an issue that is reflected in all of their correspondence – a correspondence that has indications of an outward unanimity but, even in the later letters, revealed a degree of inward enmity. For Bernard *caritas* was the law by which he lived and indeed had formed the very structure of his monastic environment. And in the growing *affectus* of the twelfth century it was the foundation of a reformed monastic community that was beginning to reflect *caritas* and *amicitia* on a more personal and intimate level of experience.

¹⁶⁷ Newman, p. 137.

¹⁶⁸ Gillian R. Knight, *The Correspondence between Peter the Venerable and Bernard of Clairvaux*, Aldershot: Ashgate, 2002, pp. 1-23.

Section 4.

Monastic *Caritas* and *Amicitia* in Cistercian Affectivity

The *Carta Caritatis* ensured that the foundation of the Cistercian community was the ideal of fraternal *caritas*. However, the *Carta Caritatis* also ensured that the Cistercian community remained committed to the asceticism of the Rule of Saint Benedict – the individual monk's journey towards God. Some scholars have recognised a tension between these two ideas, although, as Bynum puts it, it is a 'fruitful tension'¹⁶⁹. The practice of an ascetic lifestyle within the confines of a fraternal monastic community could invariably bring about some degree of stress, or even conflict, between these ideals. For the Cistercians the relationship between these tensions was developed and verbalised by those abbots who are often referred to as the 'second generation'¹⁷⁰ of founders – abbots such as Bernard of Clairvaux and Aelred of Rievaulx. Much of their work described spiritual aspects of the monastic life and the idea of fraternal *caritas* was developed within this context. Their work indicated that they thought the Cistercian interpretation of *caritas* within the monastic community aided the individual monk in his own experience of God. For both of them the pattern for the journey towards God relied heavily on the Rule of Saint Benedict – especially the seventh chapter on Humility. In this chapter Benedict described the journey towards God as a series of steps on a ladder. He described this ladder as our life on earth, and the sides of the ladder as the individual monk's body and soul. The steps, or degrees, of the virtues of obedience, silence and humility could be seen as the development of the practice of *caritas* by the individual monk toward a final goal – 'after ascending all these steps of humility, the monk will arrive at that perfect love [*ad caritatem perfectam*] of God which casts out fear'¹⁷¹. It was the interaction of fraternal *caritas* with these precepts from the Rule of Saint Benedict that both Bernard of Clairvaux and Aelred of Rievaulx developed in their own spiritual writings.

¹⁶⁹ Caroline Walker Bynum, *Jesus as Mother: Studies in the Spirituality of the High Middle Ages*, Berkeley: University of California Press, 1982, p. 61.

¹⁷⁰ M Basil Pennington, *The Cistercian Spirit: A Symposium*, Shannon: Irish University Press, 1970, p. 26.

¹⁷¹ Benedict, *RB1980*, pp. 200-201.

Aspiration to the Rule's *caritatem perfecta* or perfect love was reflected in the language of love that permeated the work of Bernard of Clairvaux and the later work of Aelred of Rievaulx. Jean Leclercq clearly shows the influences of contemporary literary language on these works¹⁷². The majority of early Cistercians entered the monasteries from aristocratic families. Because many of the monks that Bernard addressed his letters, treatises and sermons to were former knights and nobles he used the language of the courtly literature of the time – a language of love. Love literature flourished in noble society in the form of *chanson de geste* and romances. Bernard, and later Aelred, developed a new monastic genre of love literature that not only expressed their affective love for God in representations of human love relationships, but also incorporated the idea of fraternal *caritas*. Leclercq said that:

Bernard never says or assumes that the love which tends to union with God excludes an accompanying love tending to union between human persons, which remains within what he calls the order of charity, or 'charity in order'. Monastic love and other forms of Christian love have a different quality, but the latter can and ought to be integrated into this love for God.¹⁷³

It is the later work of Aelred of Rievaulx that showed how successfully these 'other forms of love' could be integrated into love for God.

Bernard of Clairvaux, born into a family of the lower nobility from Fontaines-les-Dijon, entered the monastic life at Cîteaux in 1113 under the abbacy of Stephen Harding, along with 30 of his friends and kinsmen. He had already been living a monastic life with these men for about six months in a community of his own making on a family estate at Châtillon-sur-Seine. He had formed this trial community in much the same way as Saint Augustine had done 700 years before him. McGuire said:

This first experiment with a common life indicates Bernard's special talent: he loved to be with his friends, and so it was only natural for him to see if a more durable community would work. The friendship group was casting about for a lasting commitment, and feelers were probably put out to several religious communities before Cîteaux was chosen.¹⁷⁴

After three years at Cîteaux Stephen Harding sent Bernard, still only in his mid-twenties, to found a new daughter house at Clairvaux in 1115. Stephen's choice of Bernard as founder and abbot

¹⁷² Jean Leclercq, *Monks and Love in Twelfth-Century France*, Oxford: Clarendon Press, 1979, pp. 21-23.

¹⁷³ *ibid.*, pp. 22-23.

¹⁷⁴ Brian Patrick McGuire, *The Difficult Saint: Bernard of Clairvaux and His Tradition*, Kalamazoo: Cistercian Publications, 1991, p. 22.

of Clairvaux was a controversial one due to Bernard's young age, his over-zealous nature and his inner conflicts¹⁷⁵ - stresses that were to cause the new abbot to become severely ill until he learned to moderate his excessive austerity and severity¹⁷⁶. Bernard spent the remainder of his life until his death in 1153 as abbot at Clairvaux and the example of his life and work was the main influence on the Cistercian Order over the next century. He was also involved influentially in the wider sphere of Church politics and reform of the twelfth century, and also the politics of State. Not only did he support, counsel and mentor popes, kings, bishops, knights and scholars, he also preached the Second Crusade, and was instrumental in founding the military order of the Knights Templar. However, it was Bernard's work as a theologian that was his greatest achievement, and it is in much of this work that his ideas on fraternal *caritas* are embedded.

As Newman has clearly shown, for Bernard the idea of *caritas* was an abstract concept¹⁷⁷ – the Latin word has no verb form. Although the Latin verbs *amare* and *diligere* were used traditionally since Saint Augustine of Hippo – *amare* to describe neutral love and *diligere* to describe love controlled by the will – Bernard used them interchangeably. Augustine also used the noun *dilectio* to correspond with the verb *diligere* – a practice Bernard continued. The Latin noun that Bernard most used to describe love, both God's love and human love, was *amor*. He used this noun in conjunction with the verb *amare*, once again using the verb to describe both the love of God and human love. His construction of both of these loves within the use of this interchangeable language reflects the new affectivity of the twelfth century – an emphasis on the loving nature of Christ and His ultimate example of *caritas* in the sacrifice of the crucifixion, and the emotional feelings and religious response of the individual when challenged by this *caritas*¹⁷⁸. For Bernard the logical response to *caritas* was the individual monk's journey toward God, but it was a journey that was taken up within the context of a community whose practice of *caritas* was an integral part of this journey.

Bernard's first published work *De gradibus humilitatis et superbiae*, or 'The Steps of Humility and Pride', appeared about ten years into his abbacy at Clairvaux. It was written for Godfrey of

¹⁷⁵ G.R. Evans, *Bernard of Clairvaux*, Oxford: Oxford University Press, 2000, p. 9.

¹⁷⁶ *ibid.*, p. 11.

¹⁷⁷ Newman, p. 17.

¹⁷⁸ *ibid.*, p. 17.

Langres, a kinsman of his who was the abbot of Clairvaux's second daughter abbey at Fontenay. Bernard used Saint Benedict's twelve steps on the ladder of humility as a foundation for his work. For Bernard, of course, the Rule of Saint Benedict and its strict observance lay at the very centre of Cistercian consciousness, and the chapter on humility was considered to be the very essence of the Rule itself. He defined the goal at the top of Benedict's ladder as Truth – the Truth as in the words of Jesus 'I am the Way, the Truth and the Life'. Bernard, putting the idea into a monastic context, said '[supposing], then, that you go on to object: "I see the way – humility; I long for the goal to which it leads – truth; but what if the way is so difficult that I can never reach the goal?" The answer comes promptly: "I am the life," that is, I am the food, the viaticum, to sustain you on your journey'¹⁷⁹. He said that when a monk '[sets] up in his heart a ladder of humility so that he can search into himself... when he climbed its twelve rungs he will then stand on the first step of truth'¹⁸⁰. The concept of truth for Bernard contained three degrees or steps for which he used a complex series of images patterned on the three classical stages of spiritual growth – beginners, those who are competent, and those who are perfect. The first step of truth is based on the biblical Beatitude of 'the meek who shall inherit the earth'. It focused internally on the monk's own self knowledge, the beginning point where humility taught him to see himself as he truly was, a sinner. The second step used the Beatitude of the 'merciful who themselves will obtain mercy'. This step emphasised the idea that the self knowledge in humility of the first step led to a compassionate knowledge of others in the community, and to *caritas*. The third step centred on the Beatitude of 'the pure in heart who will see God' – the practice of the first two steps led to knowledge of Truth itself through contemplation, Truth being interpreted as God Himself. It was in the second step that Bernard's ideas of fraternal *caritas* were located as part of the journey towards God.

The second step expressed the idea of fraternal *caritas* thus:

When in the light of Truth men know themselves... and are brought face to face with themselves... they fly from justice to mercy by the road Truth shows them... They look beyond their own needs to the needs of their neighbours and from the things they themselves have suffered they learn compassion.¹⁸¹

¹⁷⁹ Bernard of Clairvaux, *The Steps of Humility and Pride*, Kalamazoo: Cistercian Publications, 1973, pp. 29-30.

¹⁸⁰ *ibid.*, p. 43.

¹⁸¹ *ibid.*, pp. 45-46.

It was the operation of this mercy that led from self-love to empathy with others, and so to *caritas*. Bernard used the example of Jesus and the love he had for humanity – an example of perfect fraternal *caritas* which stemmed from his mercy:

Our Saviour has given us the example. He willed to suffer so that he might know compassion; to learn mercy he shared our misery... I do not mean that he did not know how to be merciful before; his mercy is from eternity to eternity; but what in his divine nature he knows from all eternity he learned by experience in time...¹⁸²

The work of his tender love had its beginning in his eternal mercy, its completion in the mercy shown in his humanity. All could have been done by the eternal mercy but it would have failed somewhat in satisfying us.¹⁸³

For Bernard the example of Jesus' mercy and forgiveness was the ultimate example for monks to follow in terms of *caritas*. Jesus, the Son of God, had experienced the world as man knows it, so He could empathise with the human condition, and exercise mercy. Monks should therefore empathise with each other by showing the sort of compassion which imitated the example of Jesus. The fraternal *caritas* that this compassion stimulated not only benefited the community but also brought the monk closer to God. Fraternal *caritas* was not only inspired by, but also enhanced the monk's own love for God. The Cistercian community then was a *schola caritatis* – a school of love – where monks learnt to love God as they learnt to love each other.

This theme of fraternal *caritas* as an integral part of the monk's journey toward God was a focus in much of Bernard's work – in other treatises, sermons, and also as a theme in some of his letters. In his treatise *De diligendo deo*, or 'On Loving God', he took a slightly different perspective. His four degrees of love examined the idea of love overall as a progression from love in the natural state to love under God's influence. Bernard considered the idea of fraternal *caritas* in this context in terms of 'loving your neighbour' as a movement from natural love to a more spiritual love 'in God'. In the first degree he considered the idea of love as carnal and self serving, but at the same time it was important to be able to begin to practice socially the idea of 'loving your neighbour as yourself'. Bernard argued that in order for one to begin to love another one must meet the others' needs – 'your love will be sober and just if you do not refuse your brother that which he needs of what you have denied yourself in pleasure. Thus carnal love becomes social when it is extended to others'¹⁸⁴. The second degree discussed the idea of man

¹⁸² Bernard of Clairvaux, *The Steps of Humility and Pride*, p.35.

¹⁸³ *ibid.*, p. 40.

¹⁸⁴ Bernard of Clairvaux, *On Loving God*, Kalamazoo: Cistercian Publications, 1973, p.26.

loving God for his own benefit, the third degree the idea of man loving God for God's sake, and finally the fourth degree where man loves himself in God. It is in this progression that Bernard developed the purely social 'love of neighbour' idea of the first degree into fraternal *caritas*:

In order to love one's neighbour with perfect justice, one must have regard to God. In other words, how can one love one's neighbour with purity, if one does not love him in God? But it is impossible to love in God unless one loves God. It is necessary, therefore, to love God first; then one can love one's neighbour in God.¹⁸⁵

When a man reached the third degree and loved God for God's sake, then Bernard said:

A man who feels this way will not have trouble in fulfilling the commandment to love his neighbour. He loves God truthfully and so loves what is God's. He loves purely and he does not find it hard to obey a pure commandment, purifying his heart, as it is written, in the obedience of love.¹⁸⁶

The idea of fraternal *caritas* was described here by Bernard as an integral step on the journey toward God. Fraternal *caritas*, then, was not only inspired by God, nor was it just an enhancement of the monk's own love for God. It was also a commandment from God to be obeyed because of the monk's love for God – it was the imperative of this love that enabled the monk to be obedient. For Bernard the idea of fraternal *caritas* was totally integrated into the monk's love of God. Fraternal *caritas* was deeply embedded in the spiritual ideals and practice of the Cistercians as Bernard's work clearly shows.

As a conclusion for his *De diligendo deo* Bernard added a letter that he had written previously to Prior Guy and the Carthusians at Chartreuse. In this letter he had laid some foundational ideas about fraternal *caritas*, and interestingly, he used the Latin word *caritas* throughout this letter rather than his more usual *amor*, *amare* or *diligere*. Bernard said that he '[maintains] that true and sincere charity [*caritas*] proceeds from a pure heart, a good conscience and unfeigned faith. It makes us care for our neighbour's good as much as for our own'¹⁸⁷. He went on later in the letter to locate the source of *caritas*. He said:

Charity [*caritatem*] is the divine substance. I am saying nothing new or unusual, just what St John says: "God is love [*Deus caritas est*]." Therefore it is rightly said, charity [*caritas*] is God and the gift of God. Thus charity

¹⁸⁵ Bernard of Clairvaux, *On Loving God*, p. 27.

¹⁸⁶ *ibid.*, p. 28.

¹⁸⁷ *ibid.*, p. 35.

[*caritas*] gives charity [*caritatem*]; substantial charity [*caritas*] produces the quality of charity [*caritatem*].¹⁸⁸

For Bernard the very roots of fraternal *caritas* were located in the idea that '*Deus caritas est*', God is love, and that this *caritas* that is God generates fraternal *caritas*. The more that one embraced this love and practiced fraternal *caritas*, the more one grew in the character of a true monk.

Bernard's ideas about fraternal *caritas* were also expressed in many of his sermons, especially his *Sermones super Cantica canticorum*, or 'Sermons on the Song of Songs'. In Sermon 12 Bernard praised the virtues of fraternal *caritas*, virtues that were part of the character of the true monk. Addressing his monks in chapter at Clairvaux, he said that:

... if you are at all times courteous, friendly, agreeable, gentle and humble, you will find men everywhere bearing witness to the perfumed influence you radiate. Everyone among you who not only patiently endures the bodily and mental weaknesses of his neighbours, but, if permissible and possible, even plies them with attentions, inspires them with encouragement, helps them with advice, or, where the rules do not so permit, at least does not cease to assist them by fervent prayers – everyone, I repeat, who performs such deeds among you, gives forth a good odour among the brethren like a rare and delicate perfume. As balsam in the mouth so is such a man in the community; people will point him out and say: "This is a man who loves his brothers..."¹⁸⁹

With these words Bernard gave his monks a practical framework for the practice of fraternal *caritas* within the community. In a later sermon, again in the chapter house at Clairvaux, he urged his monks 'to live peacefully and sociably with all who share their nature, with all men... by the impulse of love... [then] they discover what is written: "How good, how delightful to live together as one like brothers: fine as oil on the head"...'¹⁹⁰. Further on in the same sermon he relates the practice of fraternal *caritas* to God's law – '[for] "love is the fullness of the law" and if you love your brother you have fulfilled the law'¹⁹¹. In a later sermon Bernard again picked up on this idea that the practice of fraternal *caritas* was a fulfilment of law – a theme he looked at in his earlier work *De diligendo deo*. Once again addressing his monks, he said:

Following the wise counsel of St Paul, he must learn to love those who are caught in the habits of sin, not forgetting that he himself is open to temptation. Is it not in this very thing that love of neighbour is rooted, as the

¹⁸⁸ Bernard of Clairvaux, *On Loving God*, p. 37.

¹⁸⁹ Bernard of Clairvaux, *On the Song of Songs, Vol. I*, Kalamazoo: Cistercian Publications, 1971, pp. 81-82.

¹⁹⁰ Bernard of Clairvaux, *On the Song of Songs, Vol. II*, Kalamazoo: Cistercian Publications, 1976, p. 30.

¹⁹¹ *ibid.*, p.31.

commandment reveals: "You must love your neighbour as yourself"? For it is in intimate human relationships like this that fraternal love [*fraterna dilectio*] finds its origins; the natural inbred pleasure with which a man esteems himself is the nourishing soil that gives it growth and strength. Then, influenced by grace from above, it yields the fruits of loving concern, so that a man will not think of denying to a fellow man who shares the same nature, the good that he naturally desires for himself.¹⁹²

In these sermons Bernard located the idea of fraternal *caritas* within an affectivity of experience within 'intimate human relationships' [*intimis humanis affectibus*] – the sermons themselves are placed within the affectivity and intimacy of the language of the Song of Songs.

It was in another sermon from his series on the Song of Songs that Bernard expressed his most intimate feelings and emotions as he lamented the death of his brother Gerard, who was also the cellarer at Clairvaux. In his grieving Bernard sought to emphasise his feelings of loss as they related to fraternal *caritas* – the loss of the encouragement, compassion and the physical presence of a fellow monk who was obviously a great support in Bernard's own journey toward God. While the lament appeared as an interruption to the text of the sermon, it was actually an important part of the sermon. Bernard's own grief over the loss of Gerard is used as an exemplum of an 'intimate human relationship' that was also an example of fraternal *caritas*. Bernard addressed his monks as he placed his grief within this context:

You, my sons, know how deep my sorrow is, how galling the wound it leaves. You are aware that a loyal companion has left me alone on the pathway of life: he who was so alert to my needs, so enterprising at work, so agreeable in his ways. Who was ever so necessary to me? Who ever loved me as he? My brother by blood, but bound to me more intimately by religious profession... I was frail in body and he sustained me, faint of heart and he gave me courage, slothful and negligent and he spurred me on, forgetful and improvident and he gave me timely warning.¹⁹³

Later in the sermon he again emotionally located his grief and loss within the idea of fraternal *caritas*:

It is Gerard whom I weep for, Gerard is the reason for my weeping, my brother by blood, but closer by an intimate spiritual bond, the one who shared all my plans. My soul cleaved to his. We were of one mind, and it was this, not blood relationship, that joined us as one. That he was my blood-brother certainly mattered; but our spiritual affinity, our similar outlooks and harmony of

¹⁹² Bernard of Clairvaux, *On the Song of Songs*, Vol. II, pp. 227-228.

¹⁹³ *ibid.*, p.61.

temperaments, drew us more close still. We were of one heart and one soul¹⁹⁴.

Through these words Bernard expressed not only his grief at the loss of his brother and fellow monk, but he also expressed the importance of fraternal *caritas* to the monk. Fraternal *caritas* provided the physical love and support that each individual monk needed on his journey toward God, as well as being the glue that held the community together.

In the closing sentences of Bernard's lament for Gerard he wrote these words:

It is but human and necessary that we respond to our friends with feeling: that we be happy in their company, disappointed in their absence. Social intercourse, especially between friends [*amicos*], cannot be purposeless; the reluctance to part and the yearning for each other when separated, indicate how meaningful their mutual love [*mutuus amor*] must be when they are together.¹⁹⁵

The fraternal culture of the Cistercian community provided the ideal location for the development of new concepts within the ideal of *caritas*. The idea of *amicitia*, or friendship, had on the whole been traditionally marginalised in monastic life over the previous centuries. *Amicitia* existed at best as a formal convention modelled on Roman principles of politeness rather than an expression of true friendship. Individual friendship and the ideals of the community life were considered to be somewhat incompatible, especially when the considered role of the individual monk was to seek God and not the particular consolation of other human beings. It was not until the life experience and work of the Benedictine monk Anselm of Bec in Normandy, later archbishop of Canterbury, in the late eleventh century that *amicitia* began to find some expression within monastic communities. The experience of Anselm may have had some influence on the later Cistercian developments. Within the stimulating and affective environment of Clairvaux where many of the monks had already formed close ties of *amicitia* before entering the monastery, especially Bernard's close-knit group of relatives and friends, a merging of the ideals of *amicitia* and the ideals of fraternal *caritas* would have needed little encouragement. Bernard's words in the closing sentences of the lament for his brother indicate the distinctive merging of these ideas at Clairvaux. *Amicitia* could now be a desirable part of the monastic environment and experience and have a place alongside, or a partnership with *caritas* in developing caring and encouraging relationships within the Cistercian communities. It was in the bonds of friendship that the ideal of fraternal love could be best expressed, and it was within the

¹⁹⁴ Bernard of Clairvaux, *On the Song of Songs*, Vol. II, p. 68.

¹⁹⁵ *ibid.*, p. 69.

bonds of fraternal love that the best friends could be made. These ideas reached their fullest expression in the works of Aelred, abbot of Rievaulx in England, who, prompted by Bernard of Clairvaux, wrote two important treatises about *caritas* and *amicitia* within the context of monastic community and life.

Aelred of Rievaulx was born about 1110 at Hexham on the borders between England and Scotland. His father was a married Anglo-Saxon priest who had inherited his priesthood from his father and his grandfather before that. These circumstances were changed by the Gregorian reforms and reinforced by the Norman conquerors in exchange for papal approval of the conquest before Aelred could take his place in the line of inherited priesthood¹⁹⁶. His family had also inherited a prebendary role at the shrine of Saint Cuthbert, first at Lindisfarne, then at Durham. Aelred's education seems to have taken place at Hexham and at Durham. At the age of fifteen it appears that Aelred was sent to extend his education in Scotland and was accepted into the royal household of David I, the Scottish king. Here he was raised and educated with Henry, the heir to the Scottish throne, and quickly became a respected and well-liked member of the court¹⁹⁷. Eventually he became a steward, and his loyalty and service led him to be considered by King David for the archbishopric of St Andrews. About 1134 Aelred was sent to Archbishop Thurstan in York on business for the king, and it was there that he suddenly made a decision to become a monk at Rievaulx¹⁹⁸. He remained at Rievaulx until 1140 when he was sent to Rome to represent his abbot in a complicated controversy over the election of the new archbishop of York. It appears that he may have travelled via Clairvaux and there met Bernard, who was sufficiently impressed with his spiritual and literary skills to later ask him to write what was to become the *Speculum Caritatis*¹⁹⁹. On his return from Rome, Aelred became the master of novices at Rievaulx until he was sent in 1143 to found a new abbey at Revesby. He remained as abbot at Revesby until he returned to Rievaulx in 1147 to take up the position of abbot on the resignation of Abbot Maurice. For 20 years Aelred remained at Rievaulx as abbot until his death in January 1167. These twenty years, according to his biographer Walter Daniel, were very productive years for Rievaulx. He says '[Aelred] doubled all things in it – monks, *conversi*, laymen, farms, lands and every kind of equipment; indeed he trebled the intensity of the monastic

¹⁹⁶ Aelred Squire, *Aelred of Rievaulx: A Study*, London: S.P.C.K., 1981, pp. 7-10.

¹⁹⁷ *ibid.*, pp. 12-13.

¹⁹⁸ Walter Daniel, *The Life of Aelred of Rievaulx*, ed. F.M. Powicke, Kalamazoo: Cistercian Publications, 1994, pp. 96-100.

¹⁹⁹ Squire, p. 24.

life and its charity²⁰⁰. For the last ten years of his life Aelred was in severe pain from arthritis and gallstones²⁰¹. While most of his activities outside the abbey were curtailed, even to the extent of being excused attendance at the General Chapters in Cîteaux, this period was his most prolific in terms of writing. It was during this period that he wrote the *De Spiritali Amicitia*. He resided in a small cell built for him in the warmth of the infirmary at Rievaulx. The cell was to become the scene for many intimate conversations with his monks and friends, and the place where Aelred was able to cultivate many of his ideas about *amicitia*²⁰². Aelred died a painful and lingering death – constantly on his lips were the words '*Festinate, for crist luve*' (hasten, for Christ's love), a combination of Latin and English that for Aelred seemed easier to articulate in his pain²⁰³. He was surrounded, as he died, by his monks, those to whom in life he had been bound by fraternal *caritas*, but also by his own understanding of *amicitia*.

Aelred's life prior to becoming a monk, by his own admission, was a troubled one. Throughout his work there are a number of autobiographical references and although much of the language and style that Aelred used in these passages seems to be modelled on that of Saint Augustine of Hippo in his 'Confessions', there is little doubt that he was sincere in what he wrote. The explicit nature of some of these passages not only indicates authenticity, but has caused much discussion by scholars regarding Aelred's sexuality. Boswell, in particular, has interpreted much of Aelred's ideas about *amicitia* as the expression of a 'gay' man – 'there can be little question that Aelred was gay and that his erotic attraction to men was a dominant force in his life'²⁰⁴. It is true that the impression that Aelred gives of his past does seem to indicate that he had some struggles with his sexuality, but the modern concept of 'gay' may not necessarily apply to Aelred within the context of his own time. Medieval morality tended to equate what we call homosexuality or 'being gay' with the sinful act of sodomy only, although throughout monastic literature a precautionary attitude is implicitly taken regarding putting oneself in a situation where this act could be likely to occur. Aelred's attraction to others of the same sex may have been of a sexual nature, but it is certainly evident in his writings that it was strongly emotional in nature. It was this emotional element in Aelred's friendships combined with his probable struggle in terms of sexuality that could be recognised as what we in modern terms may call homosexual

²⁰⁰ Daniel, pp. 118-119.

²⁰¹ Brian Patrick McGuire, *Brother and Lover: Aelred of Rievaulx*, New York: Crossroad, 1994, p. 119.

²⁰² *ibid.*, p. 119.

²⁰³ Daniel, p. 136.

²⁰⁴ John Boswell, *Christianity, Social Tolerance and Homosexuality*, Chicago: University of Chicago Press, 1980, p. 222.

orientation, but in the medieval mind may not have even been equated with each other. For Aelred, his deeply emotional friendships made within the monastic order were pure and helped him on his journey towards God.

It was in the context of his work about fraternal *caritas* and spiritual *amicitia* that Aelred discussed, often quite explicitly, the nature of his past. He used his experiences to make the contrast with true and spiritual *amicitia*. Walter Daniel, in his *Vita Aelredi*, also used the same contrasts. In his Prologue to *De Spiritali Amicitia* Aelred wrote:

When I was still just a lad at school, and the charm of my companions pleased me very much, I gave my whole soul to affection and devoted myself to love amid the ways and vices with which that age is wont to be threatened, so that nothing seemed to me more sweet, nothing more agreeable, nothing more practical, than to love. And so, torn between conflicting loves and friendships, I was drawn now here, now there, and not knowing the law of true friendship, I was often deceived by its mere semblance²⁰⁵.

In the *Speculum Caritatis* Aelred appeared to be even more explicit:

The chain of my worst habits bound me... above all the knot of a certain friendship was dearer to me than all the delights of my life... I recognised that sweetness was mixed with bitterness, sadness with joy, adversity with prosperity. The charming bond of friendship gratified me, though I always feared being hurt and inevitable separation some day in the future. I pondered the joy at their beginning, I observed their progress, and I foresaw their end. Now I saw that their beginnings could not escape blame, nor their midpoint an offence, nor their end condemnation. The spectre of death was terrifying, because after death inevitable punishment awaited such a soul. Observing certain things about me, but ignorant of what was going on inside me, people kept saying "O how well things are going for him! Yes, how well!" They had no idea that things were going badly for me... Very deep within me was my wound, crucifying, terrifying, and corrupting everything within me with an intolerable stench.²⁰⁶

Walter Daniel, Aelred's biographer discussed an incident at the Scottish court when a knight 'tried secretly to excite feelings of indignation against him' and 'at other times... burst out openly in his presence and spit his venom upon him'. Then one day in the king's presence the knight attacked Aelred with 'filthy and unknighly language', protesting that Aelred was unworthy of his position for some reason that Walter Daniel would not elaborate because the words 'were too foul for me to

²⁰⁵ Aelred of Rievaulx, *Spiritual Friendship*, trans. Mary E. Laker, Kalamazoo: Cistercian Publications, 1977, p. 45.

²⁰⁶ Aelred of Rievaulx, *The Mirror of Charity*, trans. Elizabeth Connor, Kalamazoo: Cistercian Publications, 1990, pp. 134-135.

speak or for others to hear²⁰⁷. McGuire concludes that Aelred's confessions, the knight's accusations, and the absence of any women in accounts of his life indicate that Aelred was emotionally involved, and maybe sexually involved with another man at the court of King David²⁰⁸. While Aelred never admitted to having been sexually involved with another man, his autobiographical writing certainly indicates that there was a sexual element in the friendship. In his *De Institutione Inclusarum* which he wrote to his sister he gave his most explicit indication of sexual involvement:

They gave me the poison of self-indulgence to drink in the sweet cup of love. The combination of innocent affection and impure desire beguiled my inexperience. I slid down the precipice of vice and was engulfed in the whirlpool of debauchery.²⁰⁹

For Aelred his past life was a torment. His entry to Rievaulx began his own journey toward God, but not without a great deal of emotional pain, as he again related to his sister:

My God, what crosses, what torments that wretched one suffered until at last there was imparted to him a delight in chastity, so that he could overcome all the desires of the flesh which could be felt or imagined.²¹⁰

Walter Daniel recorded that Aelred built a pool in order to help him overcome his 'desires of the flesh'. The Rye stream ran through the pool, and he would 'immerse his whole body in the icy cold water, and so quench the heat in himself of every vice'²¹¹. It is clear that Aelred had 'a past' that he fought to overcome, but it was the internal struggles with that past that gave him the qualities of compassion and friendship for others within the monastery that influenced a generation of monks, and gave new meaning to the ideas of fraternal *caritas* and of *amicitia*.

Aelred's first treatise, *Speculum Caritatis*, was composed at the request of Bernard of Clairvaux. Aelred began writing it while he was the novice master at Rievaulx, but it was probably written over a number of years, especially during his abbacy at Revesby. Bernard's letter of request, placed at the beginning of the treatise before Aelred's preface, was insistent in its argument with Aelred's reluctance to write the treatise. Aelred's excuses that he was almost illiterate, came

²⁰⁷ Daniel, p. 93.

²⁰⁸ McGuire, *Brother and Lover*, p. 49.

²⁰⁹ Aelred of Rievaulx, 'A Rule of Life for a Recluse', trans. Mary Paul Macpherson, in *Treatises, The Pastoral Prayer*, Kalamazoo, Cistercian Publications, 1971, p. 94.

²¹⁰ *ibid.*, p. 67.

²¹¹ Daniel, p. 108.

from the royal kitchens and not from the schools, and had now learnt to be silent²¹² did not wash with Bernard who regarded them as mere modesty²¹³. Bernard's purpose for the work that he wanted Aelred to write was to counter criticisms that the Cistercians were so excessive in their austerity that *caritas* was becoming too difficult. Bernard urged Aelred:

... not to put off jotting [something] down on the excellence of charity [*excellencia caritatis*], its fruit and its proper ordering. Thus in this work of yours let us be able to see as in a mirror what charity [*caritas*] is, how much sweetness there is in its possession... how affliction of the outer man does not, as some think, decrease, but rather increases the very sweetness of charity [*caritatis*], and finally what kind of discretion should be shown in its practice.²¹⁴

Aelred's modesty, which appears to be mostly rhetoric, continued in his reply to Bernard's letter that he includes as a preface to his work. He said:

How can someone who is a tiny part of things or, in fact, no part at all, hold forth on the eminence of charity [*caritatis*], someone disorderly on its proper order, someone sterile on its fruit. How can someone tasteless and insipid draw out its sweetness, someone overwhelmed by self-centeredness raise himself up against it. Finally, who am I to explain how charity [*caritas*] is increased by harrowing the flesh, and its discerning practice?²¹⁵

In spite of his misgivings, Aelred's work on *caritas* was lengthy and was 'as good a picture of the love of God and one's neighbour as a man can see of himself in a mirror'²¹⁶, according to his biographer who regarded it as Aelred's best work. After these beginning sections the *Speculum Caritatis* was divided into three books – in the first book Aelred discussed what he called 'the excellence of charity [*caritatis*]' where he developed his ideas on the role of *caritas* in a person's return to God; the second book was a 'reply to the inappropriate complaints of certain people' that illustrated through dialogue with a novice how Cistercian discipline led to *caritas*; and in the third book Aelred defines his three steps of *caritas* 'to show how charity [*caritas*] should be practiced'²¹⁷. The main purpose of the treatise was apologetic, an attempt to justify to critics the austerity of Cistercian discipline as a means to acquire *caritas*. Ultimately the treatise became the finest account of how a life of Cistercian asceticism exemplified the ideal of *caritas*, although we have no record of what Bernard thought of the work²¹⁸.

²¹² Aelred of Rievaulx, *The Mirror of Charity*, p. 70.

²¹³ *ibid.*, pp. 71-72.

²¹⁴ Aelred of Rievaulx, *The Mirror of Charity*, p. 71; Aelredi Rievallensis, *Opera Omnia 1: Opera Ascetica*, eds. A Hoste and C. H. Talbot, Turnhout: Corpus Christianorum Continuatio Mediaevalis, 1971, p. 4.

²¹⁵ Aelred of Rievaulx, *The Mirror of Charity*, p. 74; Aelredi Rievallensis, *Opera Omnia*, p. 5.

²¹⁶ Daniel, p. 109.

²¹⁷ Aelred of Rievaulx, *The Mirror of Charity*, p. 75; Aelredi Rievallensis, *Opera Omnia*, p. 6.

²¹⁸ McGuire, *Brother and Lover*, p. 91.

In the first book of the *Speculum Caritatis* Aelred presented his own theological ideas regarding a monk's separation from God and the place of *caritas* in his journey back towards God. For Aelred the role of *caritas* was dynamic:

It is charity [*caritatem*] by which especially we approach God, indeed, by which we cleave to God and are conformed to him. In it the fullness of all perfection resides. It is, as it were, the goal toward which he should direct his whole course.²¹⁹

Aelred defined *caritas* as located only in God. While a monk's capacity for love is reduced by his sinful nature – Aelred calls it his 'concupiscence', or lust – a monk can regain his true capacity for love on his journey toward God by practicing *caritas*. Aelred said to God:

Someone who loves you grasps you. The more one loves the more one grasps, because you yourself are love, for you are charity [*quia ipse amor es, quia caritas es*]... I shall seek you, O Lord, seek you by loving you.²²⁰

For Aelred the journey toward God was represented in the new commandment of Jesus that exhorts his followers to love each other as he had loved them. It was this commandment that reformed the monk's spirit into the image of God:

How will this renewal come about except by the new precept of charity [*caritatis*], of which the Saviour says: "I give you a new commandment". Then, if the mind puts on this charity [*caritatem*] perfectly, charity will straightway reform the other two, namely, memory and knowledge, which... were equally disfigured. A summary of this one precept, then, is presented to us in a very salutary way; it contains the divesting of the old man, the renewal of his mind and the reforming of the divine image.²²¹

It is clear that for Aelred the practice of fraternal *caritas* was the most important and the most dynamic factor in a monk's journey towards God – a journey that, although individual, took place in a community, and, especially for Aelred, within the context of human relationships.

In the second book of the *Speculum Caritatis* Aelred discussed the place of Cistercian discipline in the practice of fraternal *caritas*. Throughout this section he often used his own life as an example for his novices of the contrast between self-centredness and *caritas*. The main theme of this book was the struggle to give up the 'yoke of concupiscence' for the 'yoke of charity' [*caritatis*]

²¹⁹ Aelred of Rievaulx, *The Mirror of Charity*, p. 288; Aelred of Rievaulx, *The Mirror of Charity*, pp. 151-152.

²²⁰ Aelred of Rievaulx, *The Mirror of Charity*, p. 88; Aelredi Rievallensis, *Opera Omnia*, p. 13.

²²¹ Aelred of Rievaulx, *The Mirror of Charity*, p.100; Aelredi Rievallensis, *Opera Omnia*, p. 22.

iugo]. Aelred located this struggle within the asceticism of Cistercian discipline and used a contrived dialogue with his novices where he contrasts the beneficial hardships of the Cistercian life with the leisurely and often luxurious aristocratic lifestyle to which many of his novices had once been accustomed. He told his novices that the beginning of the way to spiritual consolation was a way of hardship and poverty attainable only:

... if you have cast away the filthy flesh-pots of the Egyptians and have preferred the poverty of Jesus to all the world's wealth; if you have traded regal platters for the fare of coarser bread and the cheapest vegetables; if you have balanced subjection and abjection against honours; if you have stripped yourself of the cares and affairs of this world and chosen to seek your daily bread not by abusing peasants but by your toil and by work shared with your brothers; if you have put on silence in the place of loquacity and the attachment of brotherly love [*fraternae dilectionis*] in place of frequent quarrelling; [and] if you have already begun to fulfil the promises which your lips have pronounced.²²²

For Aelred the discipline and austerity of fulfilling these precepts were the clearest sign of God's presence with the novice as they fulfilled the words of Jesus 'if anyone loves me, he will keep my commandments and my Father will love him, and we will come to him and make our abode with him'. Aelred warned the novices that even though they may experience some spiritual consolation through these ascetic practices they would 'still experience much toil because of your own concupiscence', but that 'after countless struggles' and 'once the fire of divine love completely destroys the yoke of concupiscence' they would be 'afire with the unsullied ardour of charity [*caritatis*]'²²³. Aelred concluded the second book by saying that the soul's mirror reflected a monk's own perversity, but that:

... once these roots of the passions, the causes of all our toil ... have been completely torn out, and once the shoulders of our mind have submitted to the yoke of charity [*caritatis iugo*], we will learn from the Lord Jesus that he is gentle and humble of heart, and we shall find rest for our souls, by keeping not a sabbath according to the flesh of the Jews, but an eternal and spiritual Sabbath in the sweetness of charity [*dulcedine caritatis*].²²⁴

The ideal of *caritas* for Aelred was firmly placed within the context of Cistercian ascetic discipline and austerity. *Caritas* was unattainable for the novice and the monk without practicing these ascetic ideals, but as Aelred had shown, they must be practiced within the context of fraternal love in the community.

²²² Aelred of Rievaulx, *The Mirror of Charity*, p. 189; Aelredi Rievallensis, *Opera Omnia*, pp. 83-84.

²²³ Aelred of Rievaulx, *The Mirror of Charity*, p. 191-192; Aelredi Rievallensis, *Opera Omnia*, p. 85.

²²⁴ Aelred of Rievaulx, *The Mirror of Charity*, p. 218; Aelredi Rievallensis, *Opera Omnia*, p. 103-104.

In the final book of the *Speculum Caritatis* Aelred discussed his three degrees of *caritas* and out of this would come the framework for his ideals of *amicitia* that he would write about further on towards the end of his life. Aelred's three degrees of love, for which he used the allegory of the sabbath, are modelled on Bernard of Clairvaux's three degrees of truth. He expressed his three steps in this way – 'let love of self, then, be man's first sabbath, love of neighbour the second, and love of God the sabbath of sabbaths'. He further defined these sabbaths as:

... rest for the spirit, peace of heart, and tranquillity of mind [and] is sometimes experienced in love of oneself, it is sometimes derived from the sweetness of brotherly love and, beyond all doubt, it is brought to perfection in the love of God.²²⁵

While Aelred saw these degrees of love as steps on the journey toward God, he also expressed an interaction between them not expressed by Bernard. He wrote that:

These three loves are engendered by one another, nourished by one another, and fanned into flame by one another. Then they are all brought to perfection together... where neither self nor neighbour is loved for self or neighbour, but only insofar as each fades away from self and is borne totally into God.²²⁶

For Aelred these words effectively removed any tensions between asceticism and community and fully integrated the ideals of fraternal *caritas* and community and the individual monk's journey towards God. Although he integrated fraternal *caritas* into all of his three steps, he specifically located the ideal in the second step, as did Bernard in his three steps. Aelred described the transition from love of self to fraternal *caritas* as a transition from a self-centred focus to a more person-centred focus. He said that:

If, from the quite secret chamber in which a person celebrates this first sabbath, he directs himself to that inn of his breast where he usually rejoices with those who rejoice, weeps with those who weep, is weak with those who are weak, burns with those who are scandalised; and if he senses there that his soul is united with the souls of all his brothers by the cement of charity [*glutino caritatis*], and that it is not vexed by any pricks of envy, set afire by any heat of indignation, wounded by darts of suspicion, or consumed by the gnawing of rapacious sadness, then he clasps all of them to the utterly tranquil bosom of his mind. There he embraces and cherishes them all with tender attachment and makes them one heart and one soul with himself. At the very pleasing taste of this sweetness the whole tumult of self-centred desires soon falls silent and the din of evil habits quiets down. Within, there is an absolute holiday from everything harmful, and in the sweetness of brotherly love [*fraternae dilectionis*] an agreeable and joyful interlude.²²⁷

²²⁵ Aelred of Rievaulx, *The Mirror of Charity*, p. 223; Aelredi Rievallensis, *Opera Omnia*, p. 106.

²²⁶ Aelred of Rievaulx, *The Mirror of Charity*, p. 224; Aelredi Rievallensis, *Opera Omnia*, p. 107.

²²⁷ Aelred of Rievaulx, *The Mirror of Charity*, pp. 225-226; Aelredi Rievallensis, *Opera Omnia*, pp. 108-109.

The transition from love of self to fraternal *caritas* described by Aelred also shows clearly the movement of the soul on its journey toward God. For Aelred fraternal *caritas* aided the process of dealing with the monk's sinful nature and bringing peace to the soul. Interestingly, Aelred discussed the place of family, relatives, friends and enemies – even giving tacit inclusion to 'pagans and Jews, heretics and schismatics – within the context of fraternal *caritas* taking a much more universal approach to the idea by concluding that 'it widens out from a heart somehow grown larger'²²⁸. It is from this attitude within fraternal *caritas* that Aelred moved to the third degree which incorporated these ideas:

From there we should pass on to that love which constitutes the summit of fraternal charity [*fraternae caritatis*]. In it, a person is made a son of God; in it the likeness of divine goodness is more fully restored. As our Saviour said in the Gospel: "Love your enemies and do good to those who hate you. Pray for those who persecute you, that you may be the sons of your Father who is in heaven".²²⁹

For Aelred this expansion of the ideal of fraternal *caritas* as universal was an important development. It is from this development that he begins to incorporate the idea of *amicitia* into fraternal *caritas*.

It was in the last chapters of the *Speculum Caritatis* that Aelred proposed his ideas about *amicitia* – ideas that were to be expressed more fully in his work *De Spiritali Amicitia* which he wrote towards the end of his life. After some discussion about how monks should relate to each other within the community, he went on to discuss the possibility of the physical and intimate attachments of *amicitia* within the confines of fraternal *caritas*. Aelred wrote that:

... physical attachment [*carialis affectus*], which comes from a certain charm in the outward man, should therefore neither be rejected utterly nor allowed just as it gushes out. This attachment is akin to the one that leads to vices; unless a person stays rather prudently on guard, it will slip in almost without being noticed. Provided it is allowed grudgingly and with some degree of moderation, this attachment is wholesomely allowed.²³⁰

In a later chapter he proposed more fully the idea that *amicitia* could exist within the context of fraternal *caritas* and used the language of affectivity to express it. He wrote that:

²²⁸ Aelred of Rievaulx, *The Mirror of Charity*, pp. 227-228; Aelredi Rievallensis, *Opera Omnia*, pp. 109-110.

²²⁹ Aelred of Rievaulx, *The Mirror of Charity*, pp. 228-229; Aelredi Rievallensis, *Opera Omnia*, p. 110.

²³⁰ Aelred of Rievaulx, *The Mirror of Charity*, p. 265; Aelredi Rievallensis, *Opera Omnia*, p. 136.

It is no mean consolation in this life to have someone with whom you can be united by an intimate attachment [*affectu intimo*] and the embrace of a very holy love [*sacratissimi amoris*], to have someone in whom your spirit may rest, to whom you can pour out your soul; to whose gracious conversation you may flee for refuge amid sadness, as to consoling songs; or to the most generous bosom of whose friendship [*amicitiae*] you may approach in safety amid the many troubles of this world; to whose most loving breast you may without hesitation confide all your inmost thoughts, as to yourself; by whose spiritual kisses as by medicinal ointments you may sweat out of yourself the weariness of agitating cares. Someone who will weep with you in anxiety, rejoice with you in prosperity; seek with you in doubts; someone you can let into the secret chamber of your mind by the bonds of love, so that even when absent in body he is present in spirit. There, you alone may converse with him alone, all the more sweetly because more secretly. Alone, you may speak with him alone, and once the noise of the world is hushed, in the sleep of peace, you alone may repose with him alone in the embrace of charity [*in amplexu caritatis*], the kiss of unity, with the sweetness of the Holy Spirit flowing between you. Still more, you may be so united to him and approach him so closely and so mingle your spirit with his, that the two become one.²³¹

For Aelred *amicitia* was the most intimate relationship that was possible within the context of fraternal *caritas* and he used the affective and intimate language of sexual union to express it. He was also very aware of the misinterpretations and criticisms that could be raised against locating his ideas of *amicitia* within this context so he used the example of Jesus and his friendship with John. He said:

Lest someone think that this very holy sort of charity [*caritatis sacratissimum*] should seem reproachable, our Jesus himself, lowering Himself to our condition in every way, suffering all things for us and being compassionate towards us, transformed it by manifesting his love. To one person, not to all, did he grant a resting-place on his most sacred breast in token of his special love... So it is that even though all the disciples were cherished by the sweetness of supreme charity [*caritatis dulcedine*] by the most blessed Master, still it was to this one the he accorded this name as a prerogative of yet more intimate attachment: that he would be called that "disciple whom Jesus loved".²³²

Aelred considered that the practice of *amicitia* within the context of the monastic community was the highest ideal of fraternal *caritas*. For Aelred there was no disparity between *amicitia* and *caritas*. In his view *amicitia* was no longer marginal in the monastic community, but had been brought into the very centre of the practice of fraternal *caritas*. As he wrote later in *De Spiritali Amicitia* loving a friend in the context of the monastic community also meant loving God.

²³¹ Aelred of Rievaulx, *The Mirror of Charity*, p. 298; Aelredi Rievallensis, *Opera Omnia*, p. 159.

²³² Aelred of Rievaulx, *The Mirror of Charity*, p. 299; Aelredi Rievallensis, *Opera Omnia*, p. 159.

The *De Spiritali Amicitia* was a relatively short treatise containing three books that reflected three conversations about *amicitia* and its place within the monastic community. The first book was written earlier than the last two and the dialogue between Aelred and his friend Ivo took place at a daughter house of Rievaulx – probably Wardon in Bedfordshire. The dialogues of the second and third books took place at Rievaulx long after Ivo's death²³³, between Aelred and two more friends, Gratian and Walter, assumed to be his biographer, Walter Daniel. Aelred based his treatise on Cicero's work *De amicitia*. In his prologue he said that in his youth:

... there came to my hands the treatise which Tullius (Marcus Tullius Cicero) wrote on friendship, and it immediately appealed to me as being serviceable because of the depth of his ideas... . The ideas which I had gathered from Cicero's treatise on friendship kept recurring to my mind I began to ask myself whether they could perhaps have some support from Scripture.²³⁴

While Cicero can be easily identified as the one of the main classical sources that Aelred used, he also drew from the work of the church fathers, especially Saint Augustine, and as he said, from the Bible itself. In the first book of the treatise Aelred discussed his ideas about where *amicitia* comes from and contrasted various types of *amicitia*; in the second book he discussed the extent to which *amicitia* can be realised within the community; and in the third book he examined some of the practical issues and problems regarding the practice of *amicitia* within the monastic community.

In the very first sentence of the first book of *De Spiritali Amicitia* Aelred succinctly set the agenda for his treatise – that the idea of *amicitia* had a place in monastic communities. He said to Ivo, 'Here we are, you and I, and I hope a third, Christ, is in our midst'²³⁵. Aelred's idea of *amicitia* from the outset always included the bond of Christ between friends. He said that 'what more sublime can be said of friendship [*amicitia*] [than that it] begin in Christ, continue in Christ and be perfected in Christ'²³⁶. It was within the context of friendship that Aelred develops his ideas. After the initial sentence of Book One Aelred went on to describe the exclusive physical environment of friendship, first with Ivo, and then with Gratian and Walter, that reappeared throughout the treatise in which these conversations take place:

²³³ Aelred of Rievaulx, *Spiritual Friendship*, trans. Mary E. Laker, Kalamazoo: Cistercian Publications, 1977, p. 70; Aelredi Rievallensis, *Opera Omnia*, p. 303.

²³⁴ Aelred of Rievaulx, *Spiritual Friendship*, pp. 45-47; Aelredi Rievallensis, *Opera Omnia*, pp. 287-288.

²³⁵ Aelred of Rievaulx, *Spiritual Friendship*, p. 51; Aelredi Rievallensis, *Opera Omnia*, p. 289.

²³⁶ Aelred of Rievaulx, *Spiritual Friendship*, p. 53; Aelredi Rievallensis, *Opera Omnia*, p. 291.

There is no one now to disturb us; there is no one to break in upon our friendly chat, no man's prattle or noise of any kind will creep into this pleasant solitude. Come now, beloved, open your heart, and pour into these friendly ears whatsoever you will, and let us accept gracefully the boon of this place, time, and leisure.²³⁷

Within the context of the conversation with Ivo, Aelred defined his ideas of *amicitia* at the request of Ivo with an examination of the word itself:

I think the word *amicus* [friend] comes from the word *amor* [love], and *amicitia* [friendship] from *amicus*. For love [*amor*] is a certain "affection" [*affectus*] of the rational soul whereby it seeks and eagerly strives after some object to possess it and enjoy it. Having attained its object through love, it enjoys it with a certain interior sweetness, embraces it, and preserves it... Furthermore, a friend [*amicus*] is called a guardian of love [*amoris*] or, as some would have it, a guardian of the spirit itself. Since it is fitting that my friend be a guardian of our mutual love [*amoris mutui*] or the guardian of my own spirit so as to preserve all its secrets in faithful silence, let him, as far as he can, cure and endure such defects as he may observe in it; let him rejoice with his friend in his joys, and weep with him in his sorrows, and feel as his own all that his friend experiences. Friendship [*amicitia*], therefore is that virtue by which spirits are bound by ties of love and sweetness, and out of many are made one.²³⁸

Having now defined *amicitia* so that it could conform with ideas of fraternal *caritas*, Aelred seeks to establish a spiritual inheritance for the ideas. He envisioned that *amicitia* and *caritas* were part of God's work in creating the first man and woman, and so links these two ideas together from the beginning. In a discussion regarding the angels he appeared to merge the two ideas together when he said that angels could have even been in a position to envy 'had not the charity of friendship prevented it [*si non obstitisset caritas amicitiae*]'²³⁹. He went on to discuss the intention of God to create a helper for man and in the action of that creation locates the ideas of *amicitia* and *caritas* together:

It was from no similar, nor even from the same material that divine Might formed this help mate, but as a clearer inspiration to charity [*caritatis*] and friendship [*amicitiae*] he produced the woman from the very substance of the man. How beautiful it is that the second human being was taken from the side of the first, so that nature might teach that human beings are equal and... that there is in human affairs neither a superior nor an inferior, a characteristic of true friendship. Hence, nature from the very beginning implanted the desire for friendship [*amicitiae*] and charity [*caritatis*] in the heart of man, a desire which an inner sense of affection soon increased with a taste of sweetness.²⁴⁰

²³⁷ Aelred of Rievaulx, *Spiritual Friendship*, p. 51; Aelredi Rievallensis, *Opera Omnia*, p. 289.

²³⁸ Aelred of Rievaulx, *Spiritual Friendship*, pp. 54-55; Aelredi Rievallensis, *Opera Omnia*, p. 292.

²³⁹ Aelred of Rievaulx, *Spiritual Friendship*, p. 63; Aelredi Rievallensis, *Opera Omnia*, p. 298.

²⁴⁰ Aelred of Rievaulx, *Spiritual Friendship*, p. 63; Aelredi Rievallensis, *Opera Omnia*, pp. 298-299.

While Aelred see the ideas as linked, even merged, at the beginning of time, he goes on to describe their separation in the fall of man –

After the fall of the first man... with the cooling of charity [*caritate*] concupiscence made secret inroads and... corrupted the splendour of friendship and charity [*amicitiae caritatisque*] through avarice and envy, introducing contentions, emulations, hates and suspicions because the morals of men had been corrupted. From that time the good distinguished between charity [*caritatem*] and friendship [*amicitiam*]...²⁴¹

Aelred's argument continued that while the good maintained the true ideals of *amicitia* and *caritas*, the wicked developed other compacts and bonds under the name of *amicitia*, but lacked true *caritas*. For Aelred, true *caritas* and *amicitia* exist in God. When Ivo asked at the end of the first book 'Shall I say of friendship [*amicitia*] what John, the friend of Jesus, says of charity [*caritate*]: "God is friendship [*Deus amicitia est*]?"', Aelred agreed saying that 'what is true of charity [*caritate*], I surely do not hesitate to grant to friendship [*amicitiae*], since "he that abides in friendship [*amicitia*], abides in God, and God in him"²⁴². At this point Aelred's early work on his treatise finished and he left undeveloped his ideas of God as friendship. Many years later he picked up his conversations about *amicitia* again with Gratian and Walter at Rievaulx.

In the second book of *De Spirituali Amicitia* Aelred continued to develop the idea of *amicitia* in partnership with *caritas*. He seems to place *amicitia* within the context of the three degrees of love of his work *Speculum Caritatis* when he says:

Friendship [*amicitia*] is a stage bordering upon that perfection which consists in the love and knowledge of God, so that man from being a friend [*amico*] of his fellow-man becomes the friend [*amicus*] of God, according to the words of the Saviour in the Gospel: "I will not now call you servants, but my friends [*amicos meos*]"²⁴³.

With these words Aelred located *amicitia* with fraternal *caritas* in the second degree of love where a monk 'united with... all his brothers by the cement of charity' instead became 'a friend of his fellow man', and then in the third degree where instead of becoming 'a son of God', a monk became 'the friend of God'. But Aelred went on to say that *amicitia* had its own special place apart from *caritas*. While he acknowledged that *amicitia*, in the same way as *caritas*, can be

²⁴¹ Aelred of Rievaulx, *Spiritual Friendship*, p. 63; Aelredi Rievallensis, *Opera Omnia*, p. 299.

²⁴² Aelred of Rievaulx, *Spiritual Friendship*, pp. 65-66; Aelredi Rievallensis, *Opera Omnia*, p. 301.

²⁴³ Aelred of Rievaulx, *Spiritual Friendship*, p. 73; Aelredi Rievallensis, *Opera Omnia*, p. 305.

Compare 'Mirror of Charity', 3: 7, 3: 10.

stage on the journey towards God, he also now gave a greater place to *amicitia* in the monk's journey towards God. He says:

Truly, friendship [*amicitia*] shines forth with a special right of its own... Therefore, in the perfection of charity [*caritatis*] we love very many who are a source of burden and grief to us, for whose interest we concern ourselves honourably... but yet we do not admit these to the intimacy of our friendship [*amicitiae*]... in [which] are joined honour and charm, truth and joy, sweetness and goodwill, affection and action. And all these take their beginning from Christ, advance through Christ, and are perfected by Christ.²⁴⁴

Aelred argued that it is no great distance between Christ being our inspiration of friendship, to Christ being our Friend so that 'friend [*amicus*] cleaving to friend [*amico*] in the spirit of Christ, is made with Christ but one heart and one soul, and so mounting aloft through degrees of love [*amoris*] to friendship [*amicitiam*] with Christ, he is made one spirit with him in one kiss'²⁴⁵. Aelred had, by the end of the second book, transformed the idea of *amicitia* from being in partnership together with *caritas*, to the idea of *amicitia* as a very exclusive type of *caritas* that was reserved for those with whom the monk was attracted to and most intimate with in the community.

The final book of *De Spirituali Amicitia* is used by Aelred to elaborate the process by which friends are chosen. He used a four stage formula taken directly from Cicero:

A friend [*amico*] ought to be chosen with the utmost care and tested with extreme caution. But once admitted, he should be so borne with, so treated, so deferred to, that, as long as he does not withdraw irrevocably from the established foundation, he is yours, and you are his, in body as well as in spirit, so that there will be no division of minds, affections, wills or judgements. You see, therefore, the four stages by which one climbs to the perfection of friendship [*amicitiae perfectionem*]: the first is selection, the second probation, the third admission, and the fourth perfect harmony in matters human and divine with charity [*caritate*] and benevolence.²⁴⁶

Aelred expanded on each of these four stages relying heavily on biblical examples to provide characteristics for choosing friends. He concentrated on characteristics and attitudes that may cause *amicitia* to fail, especially in the first two stages of selection and probation – these included 'upbraiding, reproach, pride, disclosing of secrets, or a treacherous wound'²⁴⁷, and he also added slander, excessive anger, fickleness and suspicion. Aelred then focused on four qualities that

²⁴⁴ Aelred of Rievaulx, *Spiritual Friendship*, p. 74; Aelredi Rievallensis, *Opera Omnia*, p. 306.

²⁴⁵ Aelred of Rievaulx, *Spiritual Friendship*, pp. 74-75; Aelredi Rievallensis, *Opera Omnia*, p. 306.

²⁴⁶ Aelred of Rievaulx, *Spiritual Friendship*, p. 93; Aelredi Rievallensis, *Opera Omnia*, pp. 318-319.

²⁴⁷ Aelred of Rievaulx, *Spiritual Friendship*, p. 96; Aelredi Rievallensis, *Opera Omnia*, p. 321.

prospective friends should have in order to be fully trusted – ‘loyalty, right intention, discretion and patience’²⁴⁸. During this discussion he revealed that:

Our Lord and Saviour himself has written for us the formula for true friendship when he said: “you shall love [*diliges*] your neighbour as yourself”. Behold the mirror. You love [*diligis*] yourself. Yes, especially if you love God, if you are such a person as we have described as worthy of being chosen for friendship... he whom you love [*diligis*] will be another self, if you have transformed your love [*caritatem*] of self to him.²⁴⁹

Aelred once again located *amicitia* with *caritas* by using the traditional words of Jesus that form the foundation of fraternal *caritas*. He also again implied exclusivity for *amicitia* over *caritas* by suggesting that a person who practices these things is ‘chosen for friendship’. Finally, he placed the idea of *amicitia* in its highest plane when he speaks of ‘true and eternal friendship, which begins in this life and is perfected in the next, which here belongs to the few where few are good, but there belongs to all where all are good’²⁵⁰. Aelred concluded his treatise by using two examples of his own experience to verify his ideas on *amicitia*. The first example was a friendship from his early years at Rievaulx with another monk named Simon, and then a second anonymous friend from later years. He summarised his relationship with his second friend with these words:

Was it not a foretaste of blessedness thus to love [*amare*] and thus to be loved [*amari*]; thus to help and thus to be helped; and in this way from the sweetness of fraternal charity [*fraternae caritatis*] to wing one's flight aloft to that more sublime splendour of divine love [*dilectionis*], and by the ladder of charity [*scala caritatis*] now to mount to the embrace of Christ himself; and again to descend to the love [*amorem*] of neighbour, there pleasantly to rest? And so, in this friendship of ours, which we have introduced by way of example, if you see aught worthy of imitation, profit by it to advance your own perfection.²⁵¹

For Aelred *amicitia* was the highest ideal, and the ideal for which he strove in various forms and ways all his life. As a monk and then as abbot he sought to resolve the tensions between the *amicitia* of his youth that he had described in his work and the ideals of fraternal *caritas* practiced within the monastic communities in which he lived. Other tensions existed also due to the inclusive nature of fraternal *caritas* and the exclusive nature of *amicitia*. Aelred's solution was to place his ideal of *amicitia* within the context of fraternal *caritas* creating an exclusive form of *caritas* that could be experienced by intimate and conforming relationships that were entirely comforting and helpful in a monk's own journey towards God, while at the same time expressing an intense and satisfying encouragement for the other on his own journey towards God. For

²⁴⁸ Aelred of Rievaulx, *Spiritual Friendship*, p. 105; Aelredi Rievallensis, *Opera Omnia*, p. 329.

²⁴⁹ Aelred of Rievaulx, *Spiritual Friendship*, pp. 107-108; Aelredi Rievallensis, *Opera Omnia*, p. 331.

²⁵⁰ Aelred of Rievaulx, *Spiritual Friendship*, p. 111; Aelredi Rievallensis, *Opera Omnia*, p. 333.

²⁵¹ Aelred of Rievaulx, *Spiritual Friendship*, p. 129; Aelredi Rievallensis, *Opera Omnia*, p. 348.

Aelred then, *amicitia* relies on and is part of fraternal *caritas*, and is located in his three degrees of love. Although fraternal *caritas* was always seen as an essential part of the Cistercian journey towards God, Aelred thought that attaining a higher degree of *caritas* by the practice of *amicitia* was a possibility.

Aelred's attempt to contextualise the ideals of *amicitia* into the Cistercian practice of fraternal *caritas* appears to parallel some of the tensions the Cistercians exhibited themselves. The practice of *amicitia* at Rievaulx seems to have caused some dissension. While Aelred himself did not address any issues relating to jealousy or envy, his biographer, Walter Daniel, reported some incidents that indicate this. When Aelred was elected abbot at Rievaulx there was some criticism about his ambition. Walter wrote that 'Every good man knows this is false. That his virtue provoked jealous men to lie is not surprising – virtue never fails to stir envy – and how many jealous busybodies this man of peace had to endure!'²⁵². In addition to his *Vita Aelredi* Walter Daniel wrote a 'Letter to Maurice', which was a polemic against those who criticised Aelred after his death. In the 'Letter' Walter recorded an incident that seems to indicate the feeling of those outside the intimate *amicitia* circle. Once while Walter was with Aelred in his house a monk entered 'mad with rage'. Walter writes that:

... he came to where Aelred lay. Bellowing cruelly and gnashing his teeth he seized hold of a side of the mat, with the father lying on it, tossed them both up with all his might and hurled the father of at least a hundred monks and five hundred laymen into the fire among the cinders, shouting "O, you wretch, now I am going to kill you, now I am going to destroy you by a hard death. What are you doing, lying here, you impostor, you useless silly fellow? You shall tell no more of your lies, for now you are about to die".²⁵³

Another incident recorded both in the *Vita* and in the 'Letter' regarded an abbot from a daughter house of Rievaulx who angrily and violently attacked Aelred over some criticism by Aelred. While these incidents can be read as symptoms of dissension against Aelred's practice of *amicitia*, the fact that a polemic needed to be written following publication of the *Vita Aelredi* indicates that Aelred's interpretation and practice of *amicitia* was challenged. These tensions are similar to other tensions that are recorded in early Cistercian history and always seem to relate to a move towards exclusivity – the exclusive nature of the Cistercian practice of fraternal *caritas* was challenged by the wider monastic community through Cluny's Peter the Venerable, and the laybrothers challenged their own exclusion from the benefits of fraternal *caritas* from within the Cistercian community itself. Now the move towards an even more exclusive practice of fraternal *caritas* as exemplified in *amicitia* was challenged by monks within the very bonds of fraternal

²⁵² Daniel, p. 115.

²⁵³ *ibid.*, p. 157.

caritas itself. Aelred had taken what had been marginalised through centuries of monastic practice and placed it at the very centre of monastic practice at Rievaulx. While the Desert Fathers, Cassian and Saint Benedict generally warned against individual friendships, cliques and preferential bonds, Aelred chose to disregard these warnings. He chose instead to explore the idea of *amicitia* from the perspective of Cicero and the classical authors, the Church Fathers and especially from the Bible, in itself a reflection of the growing affectivity and humanism of the twelfth century. For Aelred the ideas of fraternal *caritas* and *amicitia* were bound together inseparably. The journey towards God meant progressing from love to love ever closer to a God who was love. Aelred's integration of *caritas* and *amicitia* was the most explicit medieval fusion of these ideas and the fullest expression of the greatest commandment to love. For Aelred it was, as Saint Benedict had already expressed, *caritatem perfecta*.

Epilogue

After Aelred's death his ideas about *amicitia* and the way in which he centrally located it within the context of fraternal *caritas* lost considerable support. Although Anselm of Bec and Canterbury and Bernard of Clairvaux had written about the place of *amicitia* within the monastic experience before Aelred, neither of them reached the heights that he had in his treatise *De Spiritali Amicitia*. In the years after Aelred the treatise was imitated and summarised creating derivative texts that omitted many of the sections relating to his personal life and experience. However, there were no immediate monastic successors in the medieval period that took up Aelred's deeply personal and affective interpretation of the idea of *amicitia*. Aelred's position regarding *amicitia* and its relationship to *caritas* was exceptional within the medieval monastic tradition. His ideas placed him outside not only the norm for Cistercian monastic life, but also the norm for all monastic life. He had pushed the idea of *amicitia* to the limits of what could be allowed within most monastic communities. Aelred's desire to love and be loved, even though responded to positively by some, created tensions within his own community and the Cistercian Order. In the end the intense affectivity of the idea within the monastic environment appeared to bring about its own demise. Successive abbots at Rievaulx did not mention Aelred in their own work, nor did they appear to continue his regime of spiritual friendship, implying that Aelred's work was regarded as excessive and disruptive within the monastic community.

The framework of the *Carta Caritatis* and its total emphasis on maintaining *caritas* within Cistercian communities was an encouraging environment for the growth of the idea that *amicitia* could be experienced in the ways that Aelred had. The Cistercian emphasis on fraternal *caritas* was flexible enough to allow for adaptation in practice, as initially Bernard and then to a greater extent Aelred had shown, in spite of the strict uniformity that Stephen Harding had anticipated when he had instituted the charter some 60 years previously. The dominance of Clairvaux and its specific emphases over these intervening years may have accounted for some of this flexibility – there is no doubt that Bernard of Clairvaux was a dominant influence for change and adaptation within the Cistercian Order during the period. Rievaulx, as a daughter-house of Clairvaux, would have certainly inherited any Clarevallian climate of flexibility and adaptability that would have nurtured Aelred's particular interest in *amicitia* and allowed him to locate it within the broader

context of fraternal *caritas*. In spite of any flexibility which may or may not have existed, Aelred's ideas about *amicitia* challenged the conformity and uniformity of the *Carta Caritatis*. This ultimately led to a suppression of his ideas and their practice within monastic communities, marginalising them even more than they had been by Cassian, Saint Augustine and Saint Benedict. Few early copies of Aelred's *De Spiritali Amicitia* were ever found outside England and the treatise was never allowed or read in monastic communities until the mid twentieth century.

Conclusion

This study has examined the ideas of monastic *caritas* and *amicitia* and their relationship within the context of the establishment and rapid development of the Cistercian Order in the late eleventh and the twelfth centuries. These ideas had their origins in the asceticism of the Desert Fathers, particularly Pachomius whose early communities in Egypt were the first to practice ascetic Christianity within the context of community. Although Pachomius wanted his communities to develop in line with the communal concept of *caritas* expressed by the biblical *koinonia*, primarily *caritas* was expressed through the individual monk's relationship with God. John Cassian was responsible for the transition of many Eastern monastic ideals to the Latin West. He considered that *caritas* should be practised to maintain the peace and unity of the community, and if the possibility of *amicitia* was to be considered at all it must not threaten the peace and unity of *caritas*. Augustine of Hippo integrated the idea and practice of *caritas* more fully into the monastic community with his *Praeceptum*. *Caritas* changed from an emphasis on an individual, ascetic and semi-solitary life and its journey towards God lived within a supportive community, to a greater emphasis on the place that fraternal *caritas* within the community itself played in the individual's journey towards God. All of these ideas met in the Rule of Saint Benedict which provided the foundation for western monastic practice. The Rule of Saint Benedict embodied the idea of fraternal *caritas* within community – Saint Benedict said himself that the Rule was designed to 'safeguard love [*caritatis*]'²⁵⁴. Within the precepts and virtues that Saint Benedict set down in his Rule his priority to maintain the ideas and practice of fraternal *caritas* was evident. It became the goal for each individual monk to strive for, and also the agenda and inner motive for the community as a whole. For all of these men, the developing idea of *caritas* was central in their aspirations, while *amicitia*, although considered possible, was a marginal, and sometimes even undesirable, consideration.

For the reforming Cistercians their return to the strict observance of the Rule of Saint Benedict was the foundation for their *Carta Caritatis* – the Charter of Love in which 'every article is redolent

²⁵⁴ Benedict, *RB* 1980, pp. 164-165.

of only what pertains to charity [*caritatis*]²⁵⁵. The Cistercian programme to maintain the ideal and practice of fraternal *caritas* was developed as a uniform observance of the precepts of the Rule of Saint Benedict as it was interpreted through the *Carta Caritatis* and by the annual General Chapter at Cîteaux. Many practical measures were instituted to ensure uniformity of observance and practice of the Rule, and also to establish unity and uniformity between houses that the Cistercians defined as *caritas* in practice. The importance to the Cistercians of maintaining their interpretation of peace and *caritas* was highlighted in their flattened hierarchical structure that not only placed all abbots in the Order under the jurisdiction of the Rule of Saint Benedict alone (as interpreted by the General Chapter), but also used the General Chapter and visitation of daughter-houses by abbots to ensure the uniformity of observance. The idea of fraternal *caritas* and its partnership with a strict observance of the Rule was used to validate the Cistercian reform as they strove for the goal of Saint Benedict's *caritatem perfecta*. However, the particular Cistercian idea of fraternal *caritas*, especially its implicit exclusivity, did not go unchallenged. From within the Order itself the laybrothers challenged an ideal and practice of fraternal *caritas* from which they themselves were excluded. The new ideals and austerity of Cistercian *caritas* were also challenged from outside the Order by the older established practices and customs of Cluny as Peter the Venerable engaged in a long and sometimes bitter correspondence with Bernard of Clairvaux over the exclusivity of Cistercian *caritas* and its customs. The framework of monastic culture and fraternal *caritas* that the *Carta Caritatis* had built on the foundations of the Rule of Saint Benedict, although challenged, provided a nurturing environment for the growth of affective forms of *caritas* and *amicitia* in the lives and work of the second generation Cistercian abbots Bernard of Clairvaux and Aelred of Rievaulx.

For Bernard of Clairvaux and especially Aelred of Rievaulx the gap between the ideas of *caritas* and *amicitia* narrowed and merged. Within the growing affectivity of the twelfth century they sought to develop the idea of fraternal *caritas* within the context of the monk's own journey towards God. Both borrowed the concept of three steps on a ladder to God from the Rule of Saint Benedict, and both located fraternal *caritas* within the second step where love of self becomes love of neighbour. Both had aristocratic backgrounds prior to becoming monks and both used the courtly language of love in their works to provide a context for their ideas about fraternal *caritas* and *amicitia*. For Bernard fraternal *caritas* was practiced within the 'intimate human relationships' of the monastic community. He thought that *amicitia* had a place alongside fraternal *caritas* in developing the necessary caring and encouraging environment of Cistercian

²⁵⁵ Waddell, *Narrative and Legislative Texts*, p. 402.

communities. The fullest merging of these ideas within the medieval monastic environment was by Aelred of Rievaulx. For him *amicitia* was the highest form of fraternal *caritas*. Not only was *amicitia* located with fraternal *caritas* in the second step of the ladder to God, it was also located with God himself, as a monk became the friend [*amicus*] of God. For Aelred the goal was not only *caritatem perfecta*, but also *amicitiae perfectionem*. Aelred encouraged individual, exclusive and intimate friendships within his community. For him it was the supreme form of *caritas* to be 'chosen for friendship'. *Amicitia* was not only compatible with *caritas*, for Aelred it was located at the very centre of fraternal *caritas*. However, the very intimacy and exclusivity of Aelred's *amicitia*, even though located in the heart of fraternal *caritas*, was implicitly, and later openly, challenged by the very inclusivity of fraternal *caritas* that Aelred's *amicitia* denied.

The idea of *caritas* had for centuries been developed as the foundational concept for monks to live together in communities. Ever since Pachomius had brought monks together in the fourth century the centrality of the idea of *caritas* had never been disputed. The idea of *amicitia* with its implications of exclusivity and distraction was marginalised, although never really disregarded completely. *Amicitia* was always a possibility. The Cistercian Order's emphasis on fraternal *caritas* and the growing affectivity of the twelfth century increased that possibility. Finally the ideas of *caritas* and *amicitia* grew closer together within this new nurturing environment, and reached their fullest expression in the intimate bonding and integration of the ideas as one by the Cistercian abbot, Aelred of Rievaulx.

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