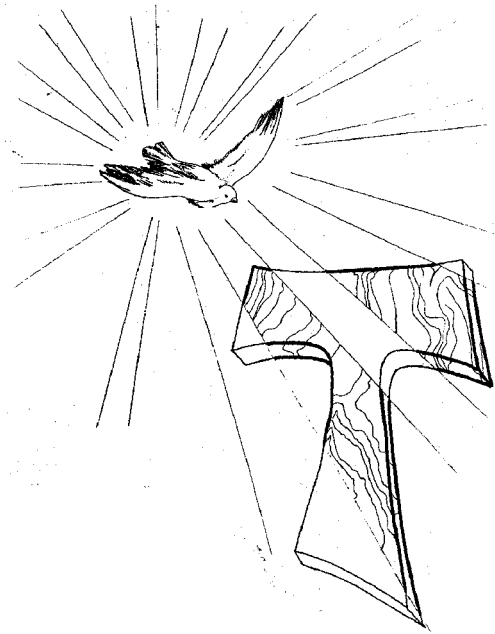


REGIONAL FORMATION DIRECTOR HANDBOOK



**DEVELOPED BY PAST AND PRESENT
NATIONAL FORMATION COMMISSIONS
SECULAR FRANCISCAN ORDER, USA
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RESOURCES FOR REGIONAL FORMATION DIRECTORS

The National Formation Commission suggests that each new Regional Formation Director be given the following resources. New Regional Formation Directors should be advised that these resources are the property of their Region and should be passed along to their successors.

1. Essential Documents of the Secular Franciscan Order (Revised 2014)
2. For Up to Now: Foundational Topics for Initial Formation (FUN) Manual (IQ printing*)
3. Franciscan Journey (Lester Bach, OFM Cap., Smoky Valley Printing*)
4. Regional Formation Director Handbook (Revised 2018)
5. Formation Resource Manual (OFS-USA Website— See the Formation tab)
6. Guidelines for Initial Formation (Smoky Valley Printing*)
7. Elements of Initial Formation (Smoky Valley Printing*)
8. Regional Formation Manual (See page 5 of this Handbook)
9. Regional Directory
10. Regional Guidelines
11. Handbook for Secular Franciscan Servant Leadership (Smoky Valley Printing*)
12. Franciscan Family Connections (Smoky Valley*)

**Ordering information can be found on the OFS-USA Website*

<https://secularfranciscansusa.org/sources-for-secular-franciscan-books-and-supplies/>

RESPONSIBILITIES OF THE REGIONAL FORMATION DIRECTOR

Thank you for answering the call to servant leadership as a Regional Formation Director in the Secular Franciscan Order. This handbook, along with the “For the Formator” section of the “For Up to Now” (FUN) manual outlines your responsibilities.

Initial Tasks

- 1) Examine your commitment to the Secular Franciscan way of life and continue to do so on a daily basis. It is only from the foundation of prayer, fraternal relationship and personal dedication to the Franciscan life that you can be an effective minister of formation.
- 2) Be informed. Take advantage of the many resources that will be given to you by the National Formation Commission and your Region. Refer to the "Resource List for Regional Formation Directors." on page two of this handbook. If you are not given these materials, please request them.
- 3) Read and become very familiar with those articles in the Rule, the General Constitutions, the National Statutes and your Regional Guidelines that deal with formation. The books, *Guidelines for Initial Formation* and *Elements of Formation*, are excellent in helping you understand the foundations of formation. Read and study thoroughly *For Up to Now: Foundational Topics for Initial Formation (FUN) Manual*, as well as the *Guidelines for Initial Formation*. Become familiar with your Regional Formation Manual. If you have questions or need support, please call on a member of the National Formation Commission.
- 4) Review the following job description, which is in six parts:
 - A. *Relationship with the National Formation Commission*
 - B. *Relationship with the Regional Council*
 - C. *Relationship with the Regional Spiritual Assistant(s)*
 - D. *Relationship with the Formation Team*
 - E. *Relationship with the Local Fraternities*
 - F. *Goals, Objectives and Long-range planning*

REGIONAL FORMATION DIRECTOR JOB DESCRIPTION

A. Relationship with the National Formation Commissioners

Relationship with the National Formation Commission

The National Formation Commission (NFC) is a group of Secular Franciscans appointed by the National Executive Council to help "form the formators" and provide resources for both initial and ongoing formation. This commission meets regularly in order to achieve its goals. They develop publications, facilitate workshops, and stay in communication with all Regional Formation Directors (RFDs). Each Region is assigned a member of the commission to be its contact person. This person stands ready to give you support, help and encouragement.

All Regional Formation Directors (RFDs) who are part of the National Fraternity of the Secular Franciscan Order in the United States (OFS-USA) are welcomed into a community of their peers. Interaction among this group of national RFDs is encouraged. Gatherings of the national RFD community are organized by the NFC.

Communication / NAFRA-FORM List Serv

Communication between the NFC and RFD's is extremely important, and internet access is vital. All RFDs are added to our National Formation "Listserv" called NAFRA-FORM. This listserv allows the NFC to easily provide information to all RFDs as a group. It also allows our RFDs to communicate easily with each other. Utilize the NAFRA-FORM listserv - when you need a question answered or you are looking for a particular book or article, the answer is just an email away.

Remember that you are the liaison between the NFC and your Region. It is your responsibility to communicate information from the NFC to your Regional Fraternity Council and to Local Fraternity Formation Directors. The National Formation Commission will keep you informed on a regular basis regarding updates, new resources, and opportunities to attend national workshops. It is your responsibility to review all communications from the NFC, and respond, as needed, in a timely manner.

B. Relationship with the Regional Council

Serving as a Member of the Regional Executive Council

You were either appointed or elected to be a member of your Regional Executive Council (REC). You will be attending REC meetings and working with your fellow council members to meet the needs of your regional fraternity. Be mindful that you work collaboratively with the council - you do not work independently. Decisions on formation are made in collaboration with the REC. Bring your ideas and share your goals with the REC; be open to their suggestions and fraternal evaluation. Bring to the attention of the REC any local fraternity formation issues or shortcomings of which you are aware, and work together with the REC to resolve them.

Regional Formation Manual

Each Region is encouraged to have a Regional Formation Manual which gives formation guidelines for your Region. If this manual does not exist in your Region, it is recommended that you develop one. There are excellent manuals available that can serve as a model. Please forward a copy of your Regional Formation Manual to the National Formation Commission.

Providing Ongoing Formation at the Regional Level

The Regional Formation Director insures that ongoing formation is presented at all Regional gatherings. This does not mean that you personally present the formation material or facilitate the discussion. You certainly may be a presenter; however, you should also rotate this responsibility to others who are gifted in this area. It is also important to utilize your Regional Spiritual Assistant. There are many ways to provide formation. Ask other RFDs for ideas. What is important is that at every OFS gathering an opportunity be given to expand our knowledge and share our experiences of living the Franciscan charism. The length of time given to ongoing formation varies depending on the length of time the group is together and the purpose of that particular event.

Reporting to the Regional Fraternity Council

The Regional Formation Director prepares and presents an annual report to the full Regional Council. This report should include a review of the past year's activities; your accomplishments and successes; the state of formation in the local fraternities; and goals for the upcoming year.

C. Relationship with the Regional Spiritual Assistant(s)

Relationship with the Regional Spiritual Assistant(s)

It is vital that you develop a good working relationship with your Regional Spiritual Assistant(s) (RSA) who is a major agent of formation. Consult with your RSA on formation matters. Keep him or her visible on the formation scene in the Region. You share responsibility with your RSA for the formation that is taking place in your Region – and this includes awareness of the initial formation that is taking place in every local fraternity within your Region.

D. Relationship with the Formation Team

The Formation Team

Although you work with the entire Regional Executive Council (REC) in the area of formation, you should also develop a Formation Team to assist you in carrying out your responsibilities. Formation Team Members also gain valuable experience and leadership skills, which may benefit the Region or National Fraternity in the future. As Regional Formation Director you are the coordinator of the team's efforts.

The Regional Formation Team works collaboratively in meeting the goals of the region regarding formation. This might entail:

- facilitating communication among local formation directors in a given area
- planning discernment and commitment retreats
- organizing various regional formation workshops
- developing materials for local formation directors
- giving attention to the unique needs of the newly professed

For more information on Formation Teams see the special section on pages 8 – 10.

E. Relationship with the Local Fraternities

Communication with Local Fraternities

It is imperative that the Regional Formation Director (RFD) and/or team members maintain regular communication with Local Fraternity Formation Directors by way of personal visits, phone calls, and emails. Through mailings or by way of the Regional Newsletter share ideas for formation, book reviews or articles of interest. During your term you, or a member of your formation team, should visit with every local formation director in your Region. Building relationship is the key to good communication. It is important that the local formation directors experience you as a brother or sister who is willing to provide help and guidance.

Support and Evaluation

The Regional Formation Director (RFD) makes certain that each local fraternity has a copy of the Regional Formation Manual. The RFD insures that the local fraternity is using this manual and implementing the guidelines it contains. Through personal contact and/or a questionnaire, explore the program for initial and ongoing formation in each local fraternity. Evaluate local formation programs in light of national formation norms (FUN Manual). Offer encouragement, and when appropriate, make suggestions, keeping in mind the unique characteristics of each fraternity and the diversity of its members.

Regional Gatherings for Local Fraternity Formation Directors

The Regional Formation Director (RFD) should coordinate gatherings of Local Formation Directors on an annual basis for the purpose of a workshop or a retreat. These gatherings provide a way for Local Formation Directors to build relationships among themselves for ongoing support and encouragement.

Additional Responsibilities:

- Ensure that pertinent information from the National Formation Commission is shared with the local fraternities.
- Review each local fraternity Visitation Report and inquire as to any formation issues that arose during the Visitation.
- Immediately after an election in a Local Fraternity, the RFD or team member contacts the new Local Formation Director to provide orientation and help them adapt to their new responsibilities.

Inter-Fraternity Events

The Regional Formation Director, in collaboration with the formation team, organizes Regional events for all those in initial formation within the region. This may be done by grouping together Local Fraternities in close proximity to one other, or in other creative ways. These gatherings enhance the formation experience of those involved and enhance the “sense of belonging” to something beyond the local fraternity. The RFD should coordinate Discernment Retreats and Days of Recollection for those in the Region who are progressing from Inquiry to Candidacy and from Candidacy to Profession. RFDs are encouraged to give special attention to the newly professed by coordinating inter-fraternity days of ongoing formation for this purpose.

E Long-range Planning

Setting Goals / Calendar

It is helpful for Regional Formation Directors to work with the Regional Council in setting goals to achieve the tasks given in this job description. When needs are many, it is important to prioritize and set realistic, achievable goals. One example might be setting up a calendar with the goal of being in contact with local fraternity formation directors on a monthly basis.

FORMATION TEAMS

Written by Anne H. Mulqueen, OFS, 2005

Definition of Formation Team

- two or more persons who work together on common formation goals
- who understand they must work in harmony to accomplish these goals

Formation Team's Objective - three major parts:

1. Intent:
 - a. Why we come together
 - b. Who we are serving
 - c. Why we are doing what we do
 - d. Basically, the intent is the formation team's "Mission and Goals Statement"
 - i. Advise and Consult (whom)
 - ii. Pay particular attention to (what)
 - iii. Identify
 - iv. Develop
 - v. Provide
2. Process:
 - a. How are we going to do it?
 - i. By creating a non-threatening atmosphere where honest communication is valued and all members feel safe
 - ii. Where everyone clearly understands the common goals; that is, what is to be accomplished
 - iii. Where everyone's responsibilities are defined
 - iv. Where there is freedom to create new ideas or to build on existing ones
 - v. Where, if a mistake occurs, it is tactfully pointed out
3. Relationships:
 - a. What are ground rules for interacting as a team?
 - i. A high level of interdependence exists
 - ii. Trust and mutual respect are present
 - iii. Team members have good people skills and are committed to the team approach
 - iv. They civilly and respectfully suggest correction and accept correction
 - v. They are willing to see a different perspective and, better yet, seek out others' perspectives
 - vi. They are willing to take risks and dream big

4. Conclusion:
 - a. It is important to remember that everyone has a unique focus—his or her way of doing things— they're not wrong; they're just different
 - b. People function best when acting from who they are; when they are authentic
 - c. Key Word to Remember: RESPECT

SELF-EXAMINATION OF YOUR FORMATION CONSCIENCE

1. Start with yourself
 - What do you like to contribute?
 - What are your personal biases?
 - Are you attending to your own ongoing formation?
2. Teamwork requires some compromise. Identify your real priorities.
 - What's most important to you?
 - What are you willing to negotiate?
3. Help your team develop
 - As problems occur, use knowledge of personality differences to identify sources and solutions to problems
 - Also, apply knowledge of personality to relationship issues and problem-solving issues
 - Make sure the right person with the right gifts gets to do the job
 - Laugh at your differences instead of being annoyed by them

EFFECTIVE FORMATION TEAMS

- Allow each member to provide knowledge and skills
- Learn how to manage conflict
- Evaluate the performance of the group
- Provide feedback and support to the group
- Put group harmony above individual needs
- Are flexible and open to others' experiences and ideas
- Consciously include persons who have talents and skills associated with different personality types
- Are able to fulfill the intent or tasks associated with the mission and goals.

CHECKLIST FOR AN EFFECTIVE FORMATION TEAM

- Are the formation team's goals being met?
- Is each member actively participating?
- Is feedback asked for and freely given?
- Is the entire formation team involved in decision making?
- Is respect and trust evident in inter-personal relationships?
- Is conflict suppressed or expressed? How is it expressed?
- Do members freely share their talents, skills, knowledge and experiences?
- When they share the above, are they used when appropriate?
- Is risk-taking encouraged?
- When mistakes are made, are they treated as a source of learning or a reason for criticism?

Remember: Reasonable people can hold very different opinions. Coming to agreement can "form" a formation team.

WE ARE FORMATORS

Written by Jan Parker OFS, 2011

We are Formators

- We fell in love, and through ongoing formation we learn what love is all about.
- We continue to love, in spite of all that love costs.
- We are Servant Leaders – we are called, we answer, we stand ready.
- We very humbly offer ourselves as an agent of formation.
- We break open the Word, and break open the formation process with those in formation.
- We share our gifts, and invite others to share their gifts, on this formation journey.
- We witness conversion – within ourselves – and within those we journey with.
- We witness the bonding that happens when another discovers and understands.
- We help others to see their call, so that they can proclaim, "This is who I am!"
- We accept that God is "the big mystery" and we are the "little mystery". Through formation we learn to live the mystery and help others to do the same.
- We are respectful of the movement of the Holy Spirit in each person.
- We know love when we see it, feel it, experience it.
- We speak of love by the way we live.

A Formator

- Is convinced of the validity of the Franciscan evangelical way of life, attentive to the life of the Church and of society, has a broad and encompassing vision, is open to dialogue, and ready to give and receive help and collaboration
- Is a fully formed Secular Franciscan, possessing the knowledge, but aware that all of us are “works in progress”
- Is committed to service, holds oneself available and responsible in relation to each brother and sister and to the fraternity
- Does not try to do this ministry alone
- Coordinates the efforts of the team, and asks for feedback from the Council and Fraternity
- Sees to the spiritual and technical preparation and animation of formation meetings; seeks to inspire by their own witness
- Helps others see the significance of their call
- Makes the commitment of time, is organized and prepared
- Understands and appreciates adult learning
- Possesses good communication skills – especially listening, reflecting
- Understands that growth is possible, but perfection belongs to God
- Practices ongoing daily conversion, and never lets their work extinguish the spirit of prayer and contemplation
- Trusts, hopes, believes, endures

Quotes to Encourage and Challenge Us

From Members of the 2008 Presidency Formation Commission

“Formation is the transmission of emotions, vital knowledge, vibrations coming from real living experiences which involve our whole being. It’s not just reading.”

“Inside this irrevocable and fully comprehensive vocation is contained God’s entire project on each one of us. There is a progressive clarification of God’s project in our life: as we grow the further specifications of our vocation become evident.”

“We can no longer afford to accept programs which settle for a bare smattering of notions to enter the Order, though seasoned with a healthy pinch of ‘Franciscan devotions’. We cannot settle for the bare minimum. We must shun superficiality, carelessness, living from day to day without adequate preparation and most of all we must aim at living what we transmit and transmit what we live with love and passion.”

“Formation does not consist in just sending or having “material”. Don’t confuse ‘formation’ with “Formation Materials.”

“The Children of Francis must continue his mission.”

“If we understand our Vocation, Charism and Mission we will better be able to help others discern theirs.”

“A Franciscan without passion had better leave. We must be very careful and wakeful to be prophets today. I only ask that, wherever you are, rather than listening to what you say, people may realize you are different. It is absolutely necessary to set about a new course.”

“Formation must be a contagious fire which has to be propagated. A flame cannot be ignited simply by thinking of doing so. We have to touch with an already ignited flame whom or what we want to set on fire. We are the children and the brethren of the “seraphic” father St. Francis. Seraphic means ardent, burning, and like Francis we must burn with an inflamed love for God and our brothers and sisters and become true burning bushes that never die out.”

“The OFS has a great mission in the Church, a reason to live and offer your vocation, by taking up a concrete engagement, in keeping with your secularity. It is necessary to

- Assume the past with gratitude
- Live the present with passion
- Prepare for the future with much confidence.”

“The Church expects us to fulfill our mission to be at the forefront of its action in the world.”

“Through Profession, the Holy Spirit has consecrated us to be oblations – the opportunity of offering our lives as gifts to be used for the good of the Church and of each other.”

“There is an acute need for well-formed formators who will be able to transmit, with passion, knowledge and doctrine, to the brothers and the sisters, to infuse in them confidence, enthusiasm and love for a holy life.”

“This manual, without a Formator who transmits it with passion and living faith, is just a bunch of paper sheets with little value.”

“The greatness of our vocation – the importance of the mission that the Church entrusts to us with the entire Franciscan family, and the extraordinary charism of St. Francis which we receive and have to make present in the Church and in the world...”

“If we are the best Secular Franciscans we can be, then we are in the best place to facilitate formation.”

“...and the purpose? For salvation - to become holier, more beautiful, stronger in faith and capable to cope with the mandate and the heritage received by St. Francis and the expectations of the Church.”