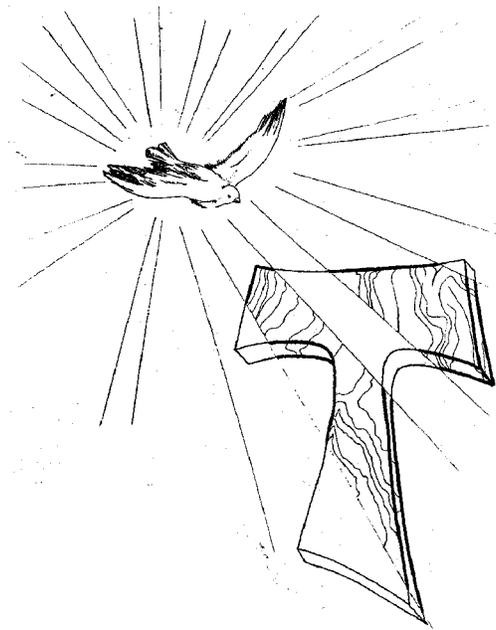


REGIONAL FORMATION DIRECTOR HANDBOOK



**DEVELOPED BY THE NATIONAL FORMATION COMMISSION
SECULAR FRANCISCAN ORDER, USA
JANUARY 2008**

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 the Region and should be passed along to their successors.

1. *The Rule of the Secular Franciscan Order* *
2. *The General Constitutions of the SFO* *
3. *The National Statutes of the National Fraternity of the SFO in the USA* *
4. *The Ritual of the SFO – USA version*¹
5. *Guidelines for Initial Formation*, National Formation Commission 1985²
6. *Elements of Initial Formation*, CIOFS, Rome 1992³
7. *For Up to Now* Manual and the associated *For Up to Now* CD
8. *SFO Formation Resource Manual* *
9. *Handbook for Regional Formation Directors* *
10. Regional Guidelines (Each region should have these in place)
11. Regional Directory (This directory would contain the names, addresses, phone numbers and emails of the council members of each fraternity, including the local fraternity Director of Formation and Spiritual Assistant)
12. Regional Formation Manual (Please refer to page 7 of the *Handbook for Regional Formation Directors* for description)

* These can be found on the *For Up to Now* CD and on the National Formation Commission website.

www.nafraformation.org

This list of formation resources has been updated to include the *For Up to Now* Manual of Foundational Topics for Formation, National Formation Commission of the United States, 2011.

¹ Available at Smoky Valley Printing Box 189, Lindsborg, KS 67456 - lindabce@kans.com or see order form in the TAU-USA

² *ibid*

³ *ibid*

RESPONSIBILITIES OF THE REGIONAL FORMATION DIRECTOR

The National Formation Commission suggests that each Regional Formation Director be given a description of their responsibilities. This job description should be developed by each Region. The National Formation Commission presents the following as a model:

Responsibilities of a Regional Formation Director

Initial Tasks

- 1) Renew your commitment to the SFO life. All Seculars should strive daily to live what they professed, and those in leadership should take this commitment very seriously. Do not allow your work to suffocate your prayer or your fraternity life. It is only from this foundation 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 your region. (Refer to the "Resource List for Regional Formation Directors." on page one of this handbook. If you are not given these materials, request them.) Read these materials. Become very familiar with those articles in the Rule, the Constitution, the National Statutes and your Regional Guidelines that deal with formation. Read thoroughly the Formation Resource manual and your own Regional Formation Manual. The books, *Guidelines for Initial Formation* and *Elements of Formation*, are excellent in helping you understand the foundations of formation. Study these. Ask questions and please know that your National Formation commissioners are available to help you with any questions or needs that you might have.

- 3) Review the following job description which is in six parts:
 - A. *Relationships with the National Formation Commission*
 - B. *Relationship with the Regional Council*
 - C. *Relationship with the Regional Spiritual Assistant*
 - D. *Relationship with the Formation Team*
 - E. *Relationships with the Local Fraternities*
 - F. *Goals, Objectives and Long range planning*

Job Description for the Regional Director of Formation

A. Relationships with the National Formation Commission

National Formation Commission

The National Formation Commission is a small group of SFO's 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 their goals. They develop publications, facilitate workshops, and stay in communication with all Regional Formation Directors (RFD). Each region is assigned a member of the commission to be their contact person. This person will be happy to help you in any way.

You are also the liaison from your region to the National Formation Commission. Questions and concerns that arise in your region can be directed, through you, to the National Formation Commission.

NAFRA-FORM

All Regional Directors of Formation who are part of the National Fraternity of the SFO in the United States are welcomed into a community of fellow formation directors. Those with internet access are added to our National Formation "List-Serve" called NAFRA-FORM. This allows the National Formation Commission to easily email information to all RFD's as a group. It also allows our RFD's to communicate easily with each other. You will soon find this to be a great resource. When you need a question answered, or when you are looking for a particular book or article, just e-mail your sisters and brothers and very quickly help is given via a return e-mail.

Resources, Updates and Workshops

The National Formation Commission will keep you informed on a regular basis regarding updates, new resources, and opportunities to attend national workshops. Please take the time to review all communication from the National Formation Commission, and respond to these communications, if requested, in a timely manner.

B. Relationship with the Regional Council

Working as a member of the Executive Council

You were either appointed or elected to be a member of your region's Executive Council. You will be attending Executive Council Meetings and working with your fellow council members to serve the needs of your regional fraternity. You work with them as part of a team. You are not alone in deciding how formation is to be accomplished. Bring your ideas to the Regional Executive Council so that together, you can benefit from each other's experience.

You may be asked by the council to serve the region in a variety of ways, but there are certain jobs for which you, as the Director of Formation are responsible. These include the following:

- **Ongoing Formation at the Regional Level**
The Regional Formation Director will insure that ongoing formation is presented at all regional meetings and gatherings. This does not mean that you personally present the formation material or facilitate discussion. You certainly may be one of the presenters; however, you should also delegate this task to others who are gifted in this area. You can also use a variety of means to provide formation. What is important is that at every SFO gathering, an opportunity be given to expand our knowledge and our experience of our Franciscan charism. The length of time given to formation should be in proportion to your total time together and commensurate with the purpose of that particular event.
 - **Working with the Executive Council**
Be mindful that you should work collaboratively with the council, being open to their suggestions and fraternal evaluation of your activities.

Share with the council your goals, as well as accomplishments and successes which are happening in the region. Also bring to their attention any formation problem or any shortcomings of which you are aware.

Request from those council members, who have conducted recent visitations, any material pertinent to formation.
 - **Reporting to the Regional Council**
The Regional Director of Formation prepares and presents an annual report to the full Regional Council. This report should include a review of the past year's activities and the goals for the upcoming year.
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C. Relationship with the Regional Spiritual Assistant

Your Regional Spiritual Assistant(s)

Develop a good working relationship with your Regional Spiritual Assistant(s) (RSA) who is a major agent of formation. Maintain ongoing consultation with your RSA on formation matters. Keep him or her visible on the formation scene in the region. You share equal responsibility with your RSA for the formation that is happening, or not happening, in your region. Collaborate with your RSA in trying to articulate a spirituality of formation which may be used in the region.

D. Relationship with the Formation Team

The Formation Team

Although you work with the entire Executive Council in the area of formation, you are also encouraged to work with the formation team in your region. (Refer to the Special Section on Formation Teams on page 10 of this handbook) The formation team helps you accomplish the many duties that are given to you. As Regional Formation Director you are the coordinator of the team's efforts. Members of the formation team gain valuable experience and leadership skills which may benefit the region or NAFRA in the future.

The formation team works collaboratively in meeting the goals of the region in regards to formation. This might entail:

- facilitating communication among Local Formation Directors in an area/district /cluster;
- planning the discernment and commitment retreats;
- organizing the various regional formation workshops;
- the gathering of materials for a handbook for local formation directors;
- being attentive to the unique needs of the newly professed within the region.

E. Relationships with the Local Fraternities

Communication

The Regional Formation Director and/or team members will make every attempt to keep in regular contact with the local fraternity Directors of Formation by way of personal contacts, visits, phone calls, e-mails, etc. Local fraternities should know who you are. During your term, try to visit ALL local fraternities in your region so that they get to know you and so you can encourage them. Bottom line – it is important that the members of the local fraternity experience you as a brother or sister in the same regional family who is willing, supportive and helpful to them in meeting their formational needs.

The RFD makes sure that information from the National Formation Commission is shared with the local fraternities.

The RFD also shares ideas for formation and articles of interest with the local fraternities. This is often accomplished through mailings or the regional newsletter.

Evaluation and Support

Through personal contact and/or a questionnaire, determine that what is being done in each local fraternity for initial and ongoing formation. Evaluate local formation programs in light of the national norms for formation; when appropriate, offer comments and suggestions, keeping in mind the unique characteristics of the fraternities and the personalities of its members.

Inter-Fraternity Events

The Regional Director of Formation with the collaboration of the formation team organizes events and gatherings of those in initial formation on the regional level. This may be done by grouping together those fraternities in close proximity to each other. These gatherings would enhance the formation experience of those involved and give them a feeling of belonging to something bigger than just their local fraternity.

Your support is also vital to Local Directors of Formation who are scheduling discernment retreats for those moving from Inquiry to Candidacy and from Candidacy to Profession. It is often helpful to cluster these retreats.

In supporting the local fraternity's duty to give special attention to the newly-professed, inter-fraternity days of on going formation for them are also encouraged.

Regional Formation Manual

Each region is encouraged to have its own Formation Manual. If this manual does not exist in your region it is highly recommended that you develop one. There are excellent manuals in several regions that could be used as a model as you develop your own.

NOTE: Regional Formation Manuals should be submitted to the National Formation Commission for approval.

The Regional Formation Director 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.

F. Long range planning

Setting Goals / Calendar

It is helpful for Regional Directors of Formation to work with the Regional Council in setting goals in order to achieve the many tasks that are described within their job description. When the needs are many, it is important to prioritize and set realistic, achievable goals, in a spirit of simplicity and prayerful discernment.

A long range plan might include a calendar with the goal of being in contact with local fraternity formation directors on a monthly basis. A sample of this type of calendar follows.

Regional Formation Director Calendar

JANUARY

This is the month of starting over again. A New Year has arrived. Why not gather your formation personnel and have a prayer service during which they could renew their promise to be of service as Local Formation Directors? Have them share with you some areas of concern which you may be able to discuss with them throughout the New Year. If you cannot gather ALL the formation directors, have them gather in clusters. Send them a sample Prayer Service which they can follow. Either you or a Spiritual Assistant can compose this para-liturgy. Round out the gathering with some simple refreshments.

FEBRUARY

Send out Valentine Day cards to each local formation director. Express sentiments of appreciation for what they are doing. Repeat your own commitment to be of help to them whenever they need you. Perhaps a bookmark could be included as a token of appreciated service.

MARCH

Send out a Lenten letter to all local formation directors. Remind them that as the universal Church has already begun the observance of Lent, so they are to be aware of their own Professions as Brothers and Sisters of Penance; to make Lent a way of life that goes beyond 40 days and is truly life transforming. If feasible, perhaps a Day of Recollection could be held for Formation personnel following a Lenten theme. If it is not possible because of distance, have these days on a cluster basis.

APRIL

Once again, a card with Easter greetings lets your formation directors know that you keep them in mind. Remind them that as the Risen Christ holds out the promise of New Life to all of us, so we continue to do things in our fraternities which are “life giving”. Help them to encourage their sisters and brothers in initial formation that the SFO is a “New Life” for them and is quite contagious if well-lived.

MAY

This is traditionally the month of Mary. Francis considered her as his mother. He also reminded his followers that they were to be mothers to each other. Perhaps you can send out a little meditation booklet for use with the Franciscan Crown Rosary. Although the Crown is a private devotion, there are some fraternities which use the Crown creatively as a group. Perhaps recommend a Liturgy of the Word where scripture is read, there is quiet reflection, a decade of the Crown is prayed and a closing prayer is said.

JUNE

Send a note wishing everyone a wonderful summer and encourage them to meet during July and August. Suggest holding formation session outdoors; enjoy a trip together; include a recipe for a light lunch and a cool dessert. Remind them to be sure to plan to celebrate the coming Franciscan feasts like Anthony of Padua (June 13); St. Bonaventure (July 15); the Portiuncula (August 2); St. Clare (August 11); Louis IX, Patron of the SFO (August 25); the Stigmata (September 17) and of course the Transitus and Feast of Francis (October 3&4). Don't forget the other patron of the SFO, Elizabeth of Hungary (November 17) Now is the time to plan ahead. Take a little rest and tell them that they will hear from you in September.

SEPTEMBER

Hello again! The Franciscan month of October is approaching. Perhaps you can inform the formation directors where they can obtain Franciscan gifts, medals, Tau crosses, etc. Tell them where they can find Transitus celebrations in the Region. Send all those in initial formation a special Franciscan Card wishing them a Happy Francis Day to encourage them on their journey.

OCTOBER

Do you have a list of resource persons who could give a day of Recollection ... someone who could give a workshop on the Franciscan charism? Your list could be representative of the entire Franciscan family. Your diocese may be helpful in helping you to add names of people who would be good speakers on the spiritual life. Share this list with your formation directors. It's a great St. Francis Day gift!

NOVEMBER

This is the time when many fraternities assemble food baskets for Thanksgiving. It might be a good idea to ask the formation directors to make sure that there is an apostolic or ministerial component to their formation sessions. If not, give them some ideas.

DECEMBER

Encourage formation directors to make live, once again, the wonderful experience of Greccio. Suggest in your Christmas letter a Vesper or Night Prayer service including the reading of the Greccio account and the placing of the figures in the cheche at various points during the reading. Those in formation should be responsible for drawing up the service ... it could be their Christmas gift to the fraternity.

SPECIAL SECTION ON FORMATION TEAMS

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 do we come together?
- b. Who are we serving?
- c. Why are we 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 is 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 other's 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—

i. 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 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 includes
 - (1) persons who have talents and skills associated with different personality types
 - (2) 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.

**Define for yourself what you expect in and from your formation team.

Anne H. Mulqueen- 8/1/2005