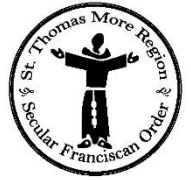




Essential Elements of Formation selected directly from our Rule, General Constitutions (2000), National Statutes, and St. Thomas More Regional Norms



Our Rule

Art. 3 – “its [the Rule’s] application will be made by the General Constitutions and particular statutes.”

Art. 23 – “Admission to the Order is gradually attained through a time of initiation, a period of formation of at least one year and profession of the Rule.”

General Constitutions

All selections from the General Constitutions relate to and enlarge upon Article 23 of our Rule of Life.

ENTRANCE INTO THE ORDER AND FORMATION

Article 37

1. Membership in the Order is attained through a time of initiation, a time of formation, and the profession of the Rule.
2. The journey of formation, which should develop throughout life, begins with entrance into the fraternity. Mindful that the Holy Spirit is the principal agent of formation and always attentive to collaboration with Him, those responsible for formation are: the candidate, the entire fraternity, the council with the minister, the master of formation, and the assistant.
3. The brothers and sisters are responsible for their own formation, developing in an ever more perfect way the vocation received from the Lord. The fraternity is called to help the brothers and sisters in this journey by means of a warm welcome, prayer, and example.
4. The elaboration and adoption of means of formation, adapted to the local situations and offered as a help to those responsible for formation in the individual fraternities, belong to the national and regional councils in common agreement.

The Time of Initiation

Article 38

1. The time of initiation is a phase preparatory to the true and proper time of formation and is intended for the discernment of the vocation and for the reciprocal acquaintance between the fraternity and the aspiring member. It should guarantee the freedom and the seriousness of entrance into the OFS.
2. The duration of the time of initiation and the forms employed in its development are established by the national statutes.

3. It belongs to the fraternity council to decide possible exemptions to this time of initiation, keeping in mind the guidelines of the national council.

Admission to the Order

Article 39

1. The request for admission to the Order is presented by the aspirant to the minister of a local or personal fraternity by a formal act, in writing if possible.
2. Conditions for admission are: to profess the Catholic faith, to live in communion with the Church, to be of good moral standing, and to show clear signs of a vocation (Can. 316).
3. The council of the fraternity decides collegially on the request, gives a formal answer to the aspirant, and communicates this to the fraternity.
4. The rite of admission is performed according to the Ritual (Ritual, Preface n. 10ff.; chapt. 1). The act is to be registered and preserved in the records of the fraternity.

The Time of Formation

Article 40

1. The time of formation lasts at least one year. The national statutes can establish a longer period. The purpose of this period is the maturation of the vocation, the experience of the evangelical life in fraternity, and a better knowledge of the Order. This formation should be carried out with frequent meetings for study and prayer and with concrete experiences of service and of apostolate. These meetings should be held, as far as possible and opportune, in common with the candidates of other fraternities.
2. The candidates are guided to read and meditate on Sacred Scripture, to come to know the person and writings of Francis and of Franciscan spirituality, and to study the Rule and Constitutions. They are trained in a love for the Church and acceptance of her teaching. The laity practice living their secular commitment in the world in an evangelical way.
3. Participation in the meetings of the local fraternity is an indispensable presupposition for initiation into community prayer and into fraternity life.
4. A style of teaching which is Franciscan in character and which fits the mentality of the persons concerned should be adopted

The Profession or Promise of Evangelical Life

Article 41

1. Having completed the time of initial formation, the candidate submits to the minister of the local fraternity a request to make his or her profession. Having heard the master of formation and the assistant, the fraternity council decides by secret ballot on the admission to profession, gives its reply to the candidate, and informs the fraternity.
2. The conditions for the profession or promise of evangelical life are:
 - attainment of the age established by the national statutes;
 - active participation in the time of formation for at least one year;
 - the consent of the council of the local fraternity.
3. Where it is held to be opportune to lengthen the time of formation, it must not be extended to more than a year beyond the time established by the national statutes.

Article 42

1. Profession is the solemn ecclesial act by which the candidate, remembering the call received from Christ, renews the baptismal promises and publicly affirms his or her personal commitment to live the Gospel in the world according to the example of Francis and following the Rule of the OFS.
2. Profession incorporates the candidate into the Order and is by its nature a perpetual commitment. Perpetual profession, because of objective and specific pedagogical reasons, may be preceded by a temporary profession, renewable annually. The total time of temporary profession may not be longer than three years (Ritual, Preface n. 18).
3. Profession is accepted by the minister of the local fraternity or by his or her delegate in the name of the Church and of the OFS. The rite is carried out according to the norms of the Ritual (Ritual, Preface n. 13ff.; Part 1, Chapt. II).
4. Profession does not only commit those professed to the fraternity, but also, in the same way, it commits the fraternity to be concerned with their human and religious well-being.
5. The act of profession is registered and preserved in the records of the fraternity.

Article 43

The national statutes establish:

- the minimum age for profession which, however, may not be less than eighteen years completed;
- the distinctive sign of membership in the Order (the "Tau" or other Franciscan symbol).

Continuing Formation

Article 44

1. Begun by the preceding stages, the formation of the brothers and sisters takes place in a permanent and continuous way. It should be understood as an aid in the conversion of each (GC 8; 1Cel 103) and everyone and in the fulfillment of their proper mission in the Church and in society.
2. The Fraternity has the duty to give special attention to the formation of the newly professed and of the temporarily professed, to help them become fully mature in their vocation and develop a true sense of belonging.
3. Ongoing formation – accomplished by means of courses, gatherings, and the sharing of experience – aims to assist the brothers and sisters:
 - (relates to article 4 of our Rule) In listening to and meditating on the Word of God, "going from Gospel to life and from life to Gospel;"
 - In reflecting on events in the Church and in society in the light of faith, and with the help of the documents of the teaching Church, consequently taking consistent positions;
 - In discerning and deepening the Franciscan vocation by studying the writings of Saint Francis, Saint Clare and Franciscan authors.

Promotion of Vocations

Article 45

1. The promotion of vocations to the Order is a duty of all the brothers and sisters and is a sign of the vitality of the fraternities themselves.

The brothers and sisters, convinced of the validity of the Franciscan way of life, should pray that God may give the grace of the Franciscan vocation to new members.

2. Although nothing can substitute for the witness of each member and of the fraternity, the councils must adopt appropriate means to promote the Secular Franciscan vocation.

Statutes of the National Fraternity of the Secular Franciscan Order in the United States of America

Article 19. Formation

1. Orientation

a. Orientation is a time for determining a person's interest, eligibility and disposition to enter into the initial formation process [cf. Guidelines for Initial Formation in the Secular Franciscan Order in the United States (hereafter Guidelines for Initial Formation), page 25].

b. The period of orientation shall consist of not less than three (3) months.

2. Initial Formation

- a. Inquiry – The period of Inquiry, which begins with the Ceremony of Introduction and Welcoming [cf. Ritual, page 9], shall consist of not less than six (6) months.
- b. Candidacy – The period of Candidacy, which begins with the Rite of Admission [cf. Ritual, page 11], shall consist of not less than eighteen (18) months and not more than thirty-six (36) months.
- c. All persons in initial formation, in addition to attending their formation sessions, must participate in the meetings of the Local Fraternity as this is an indispensable presupposition for initiation into community prayer and into fraternity life [cf. General Constitutions, article #40.3].
- d. To be admitted to the OFS in the United States, a person must be a fully initiated member of the Catholic Church (i.e., having received the Sacraments of Baptism, Chrismation/Confirmation and Holy Eucharist) in addition to being an actively practicing Catholic.

3. Profession

- a. The minimum age for perpetual profession as a Secular Franciscan in the United States is twenty-one (21) years.
- b. The minimum age for temporary profession as a Secular Franciscan in the United States is eighteen (18) years.

4. Ongoing Formation

Ongoing formation is the responsibility of all professed members consonant with article #44 of the General Constitutions.

5. Form and Methodology

- a. The form (i.e., content and process; cf. General Constitutions, #38.2) to be employed in both initial and ongoing formation is that found in the Guidelines for Initial Formation.
- b. The methodology employed in formation should be both interactive and experiential in nature [cf. General Constitutions, #40.4].
- c. Opportunities for fraternities to meet together for the purposes of common ongoing and initial formation shall occur whenever possible at all levels of fraternity [cf. General Constitutions, #40.1].

6. Provisions for Remote Initial Formation

In those rare instances in which a person is legitimately impeded from participating in the normal formation process of a Local Fraternity, recourse may be had to the Guidelines for Remote Initial Formation in the United States as adopted by the National Executive Council in June 2000.

ST. THOMAS MORE REGIONAL FORMATION NORMS

FORMATION IS VITAL FOR THE ORDER

Formation is “one of the most vital functions within our Order, that of helping our sisters and brothers of the Secular Franciscan Order come to a deeper understanding of our vocation as we seek to observe the Gospel of our Lord, Jesus Christ after the manner of St. Francis.” (FUN Manual, For the Formator, p. 8)

INITIAL FORMATION CYCLE

For the purpose of order and stability, it is recommended that each fraternity in the St. Thomas More Region establish an initial formation cycle.

Fixed Calendar Formation Program (New aspirants are accepted once a year).

Example:

Orientation 3 months minimum (September – November)

Inquiry 6 months minimum (December – May)

Candidacy 18 months minimum, but not to exceed 36 months (begin in June)

Rotating Formation Program (New aspirants are accepted any time during the year).

A rotating formation program may be established in lieu of a fixed calendar program. The rotating formation program goes in rotation, where the bulk of information during initial formation (Candidacy phase) has no beginning or end point – it is ongoing. Separate sessions are held for those in Orientation and Inquiry. After completing the Orientation and Inquiry stages, the aspirant then “plugs in” to where everyone else is in the Candidacy phase and remains for the entire time of his/her Candidacy.

(Richard Trezza, O.F.M. National Formation Commission (1999, 2005) TAU-USA Issue #17, Fall 1997)

STRUCTURE OF THE FORMATION PROCESS

The “Pathway to Profession” (FUN Manual, for the Formator, p13) is a diagram and outline of the structure of the formation process that is to be followed in the initial formation program of the local fraternities.

This diagram should be given to prospective members in the Orientation phase.

INITIAL FORMATION NOTEBOOK

The use of a formation notebook is highly recommended for all those in Initial Formation, in which they complete all written assignments and write down any questions or insights they might have,

anything they might not fully understand and experiences of living the Gospel Life that they would like to share with the group. This notebook can be used during group discussion and sharing at the formation sessions.

A separate journal, which is to be kept private, may also be used.

ATTENDANCE

Those in Initial Formation must faithfully attend all the formation sessions and must participate in the gatherings of the fraternity as well.

Formation attendance receives priority over all other social and church commitments.

This must be well understood by the aspirant in the beginning stage of Orientation.

Priorities for a Secular Franciscan are:

1. Marriage
2. Family
3. Work
4. Secular Franciscan Order
5. Any other activities.

If for some reason a formation session or fraternity gathering is missed, a call must be made to the Formation Director explaining the reason for the absence.

An accurate attendance record must be kept by the Formation Director

MAKE UP SESSIONS

If a formation session is missed, the Formation Director or someone from the local fraternity Formation Commission (team) is to meet with the aspirant to catch up on the material that was presented.

This make-up session should take place sometime before the next regularly scheduled formation session. Making up the missed session by telephone or mail goes against the spirit of formation, which is all about RELATIONSHIP.

INTERVIEWS

All Candidates are to be individually interviewed by the Local Fraternity Council prior to entering Candidacy and prior to Profession with a minimum of one additional interview during Candidacy.

At the end of the Inquiry phase, two interviews are scheduled with the Inquirer – one conducted by the Spiritual Assistant (if available) and one by the Council. These interviews could be combined in the form of a roundtable discussion with the Spiritual Assistant, (if available) and the Council. (FUN Manual, For the Formator, p 19-20)

Towards the end of Candidacy, two interviews are scheduled with the Candidate- one conducted by the Spiritual Assistant (if available) and another by the Council. These interviews could be combined in the form of a roundtable discussion with the Spiritual Assistant (if available) and Council. (FUN Manual, For the Formator, p. 23)

In addition, there is to be a minimum of one additional interview during Candidacy with the Fraternity Council.

Example:

1st Interview: before entering Candidacy

2nd Interview: at 9 months of Candidacy

3rd Interview: prior to Permanent Profession

These interviews enable the Council to come to a mature discernment of the Candidate's suitability for a permanent commitment to the Secular Franciscan way of life.

Each fraternity council is to formulate interview questions.

FORMATION RESOURCES

In all of our regional formation; Initial and Ongoing; we use those resources recommended by the National Fraternity (NAFRA).

Formation Directors should be thoroughly familiar with and utilize the two following publications. "Initial formation will suffer without both of these resources." (FUN Manual, For the Formator, p5)

1) Guide for Initial Formation in the Secular Franciscan Order in the United States, prepared by the National Formation Commission of the National Fraternity of the Secular Franciscan Order – U.S.A., 1985.

2) For Up to Now - Foundational Topics for Initial Formation (FUN Manual), prepared by the National Formation Commission of the National Fraternity of the Secular Franciscan Order U.S. A, 2011.

The FUN Manual is to be used as a resource.

All foundational topics in The FUN manual must be covered during initial formation.

The Franciscan Journey, Lester Bach OFM Cap is the recommended basic text for initial formation. "The Councilar and Post-Councilar Documents of Vatican II, Papal and Episcopal Documents, Franciscan sources and history, and the major official documents of the Secular Franciscan Order (the Rule of 1978, the General Constitutions, the National Statutes and the Ritual) are each to be given pride of place in all our formation programs." (National Formation Commission, 1999).

In the event of an occasional guest speaker, there are two requirements that must be met:

1. The content of their presentation must clearly be in unity with the Holy Father and the teachings of the Church.
2. Their presentation must advance in some way our understanding and living out of our Secular Franciscan vocation.

These two points apply also to any videos that might be shown.

SEMI-ANNUAL FORMATION REPORTS

All Formation Directors shall submit a Semi-Annual Formation Report to the Region.

The midyear report is due June 15.

The year-end report is due December 15.

Formation Directors are to use the approved Semi-Annual Formation Report form and forward the completed form to the Regional Formation Director.

Sponsoring fraternities are to submit a separate report for a newly forming group or an emerging fraternity.

SPONSORS

“The Ceremony of Welcoming is a natural time to formalize a relationship between the newcomer and a sponsor.” (FUN Manual, For the Formator, p 17)

By the time Candidacy begins, an Inquirer must have a sponsor, either chosen by the Inquirer or appointed by the Council. The sponsor accompanies the Candidate on his/her journey of discernment and preparation for permanent commitment by developing a relationship of “deep communion and friendship” with him/her. (Elements of Formation, 1992).

The sponsor must be an active, professed member of the Local Fraternity in which the aspirant is a member. It is recommended that the sponsor attend all formation sessions with the Candidate.

RECORDS

Aspirant Records: “It is recommended that all information forms, sacrament records, interview observations, correspondence, letters of recommendations and other notes be kept in a confidential file folder for each prospective member. This will help the Fraternity Council in their discernment process.” (FUN Manual, For the Formator, P 15)

The file folder should be kept until the time of Permanent Profession.

Admission Inventory

“The following documents must be on file prior to the Rite of Admission and should be obtained early in the Inquiry Phase:

- Baptism Certificate, annotated with other sacrament dates.
- If married provide verification of validity (a sacramental marriage).
- Decree of Nullity, if applicable.
- If ordained, provide copy of letter verifying faculties.
- Two letters of recommendation, one being from the Inquirer’s pastor.”

(FUN Manual, For the Formator, p 18-19)

Rite of Admission

“Immediately after the Rite of Admission the act is to be registered and preserved in the records of the fraternity.” (FUN Manual, For the Formator, p 22)

Rite of Profession

“Immediately after the Rite of Profession the act is to be registered and preserved in the records of the fraternity.” (FUN Manual, For the Formator, P 25)

ELECTIONS/OUTGOING FORMATION DIRECTOR

It cannot be overstated how important it is to keep all formation records in good order out of love for the new Formation Director. The outgoing Formation Director is responsible for acquainting the new Formation Director with the Regional Formation Norms and with any other particular ways in which the fraternity conducts formation. A smooth and orderly transition is essential for the good of those in formation and for the benefit of the whole fraternity as well.

FREQUENCY OF INITIAL FORMATION SESSIONS

Orientation, Inquiry, and Candidacy sessions are to be held one time per month.

Orientation session is to be for a minimum of one hour.

Inquiry session is to be for a minimum of 90 minutes.

Candidacy session is to be for a minimum of two hours.

FORMATION COMMISSION

The Local Fraternity Council is to establish a Formation Commission (formerly referred to as the “formation team”) under the direction of the Formation Director and working in unity with the Council. This Formation Commission acts as a valuable support and concrete help in the work of formation, and is to meet as needed to discuss and evaluate the formation program with the Formation Director acting as its chairperson.

ONGOING FORMATION OF THOSE TEMPORARILY WITHDRAWN

Those members of the fraternity who have temporarily withdrawn due to certain difficulties with health, family, work or distance are to be visited, or at least contacted, once every month. They are to receive the fraternity newsletter and any ongoing formation materials for the sake of nourishment and support.

TEMPORARY PROFESSION

Temporary Profession is only permitted in accordance with the For Up to Now manual, prepared by the National Formation Commission of the National Fraternity of the Secular Franciscan Order – U.S.A. 2011,

Section 3 What is Formation 3-23-2011 Page 10 of 22 and Page 11 of 22:

2.3. PERIOD OF TEMPORARY COMMITMENT

Article 23: Profession incorporates the candidate into the Order and is by its nature a perpetual commitment. Perpetual profession, because of objective and specific pedagogical reasons, may be preceded by a temporary profession, renewable annually. The total time of temporary profession may not be longer than three years. (Article 42.2 General Constitutions)

2.3. a. Primary Objectives

- To allow the candidate time to attain the age requirement necessary for profession to the Rule

- To reconcile any indecision on the part of the candidate with regard to permanent commitment
- To reconcile any lack of certainty on the part of the fraternity as to the suitability of the candidate for permanent commitment

2.3. b. Material Content During Temporary Commitment

- Continue to reinforce all subject material covered during the time of formation
- Continued study and reflection on Sacred Scripture
- Continued study and reflection on ecclesiology
- Continued study and reflection on Franciscan history and spirituality
- Continued study and reflection on the role of the laity

PROVISIONS FOR REMOTE INITIAL FORMATION

“In those rare instances in which a person is legitimately impeded from participating in the normal formation process of a Local Fraternity, recourse may be had to the Guidelines for Remote Initial Formation in the United States as adopted by the National Executive Council in June 2000.” (NAFRA Statutes, Formation article 19.6)

The Local Fraternity Council must contact the Regional Executive Council prior to beginning Remote Initial Formation in a Local Fraternity.

AGE REQUIREMENTS

An aspirant younger than 21 years of age (minimum age for Permanent Profession) may participate in the initial formation program at the discretion of the Local Fraternity Council after prayerful discernment and conducting the Initial Interview and the Faith Inventory.

CANDIDATE WITHDRAWAL OR SUSPENSION

“Candidates that withdraw or are suspended from formation and wish to return at a later time must start the formation process at the Orientation phase.” (Regional Governance Norms)

RETREATS/EVENTS

The Local Fraternity Council/Formation Director should provide a discernment and commitment retreat for the Candidates prior to Permanent Profession.

To enhance the formation experience, inter- fraternity retreats and events among aspirants in initial formation are highly recommended.

ADMISSION TO PROFESSION

The Local Fraternity Council decides by secret ballot on the admission to Profession. (General Constitutions of the Secular Franciscan Order 2000, article 41.1)

REVISED & APPROVED BY ST. THOMAS MORE REGIONAL COUNCIL OCTOBER 24, 2015

From our Regional Governance Norms:

Norms amended: February 20, 2016

Norms approved: February 20, 2016

Chapter Six

Membership

- 32.** A person from the Secular Franciscan Order can join an organization whose documents note that it is a private association of the faithful. However, the Secular Franciscan Order at all levels is to be the person's top priority.
- 33.** A person from the Secular Franciscan Order cannot join an organization whose documents note that it is a public association of the faithful.
- 34.** If a person from the Secular Franciscan Order is a member of an organization whose documents note that it is a private association of the faithful and then becomes a public association of the faithful, the Secular Franciscan member must choose between the Secular Franciscan Order and the other organization.
- 35.** "Candidates who withdraw or are suspended from formation and wish to return at a later time, must start the formation process at the Orientation phase."

Affiliate Member

- 36.** Should a person in affiliate status seek to become a professed member of the SFO, then the requirements of the formal formation process supersede all parts of the affiliate orientation plan. Affiliation orientation does not shorten or alter the norms of the formation process of the SFO.
- 37.** Note that at the beginning of affiliate orientation the local fraternity minister and assigned sponsor must clearly advise that the affiliate, once approved, has no juridical bond, voice (right to hold office), or official status within the SFO.

These directives for formation were compiled by MaryEsther Stewart, ofs, Formation Director, St. Thomas More Region, October 2018, for the purpose of providing all fraternity formation directors with a ready access to the elements in our Rule, General Constitutions, National Statutes, and Regional Norms related to formation.