

Francine Gikow with comments by Diane Menditto

Question: How to help the local fraternity directors use 2 prong discernment by the Inquirer/Candidate

- Reminder that the Holy Spirit is “in charge” and will assist in the discernment when asked by giving the person a sense of “rightness” of the decision and peace.
- Direct them to use the assistance of their Spiritual Assistant. If none, refer to the Regional Spiritual Assistant.
- Provide a workshop to encourage FD’s to look at discernment more completely- both by the Inquirer and the Candidate.
- Talking Points:
 - Stress what both Justin and Anne Mulqueen has said about
 - 1, the ramifications of professing the wrong person and
 - 2. not to let issues slide but when “red flags” are seen to address them quickly with the person and
 - 3. do not leave it to the next Council to address. Leaving issues not addressed is not fair to the Inquirer/Candidate and to the Fraternity.
- IF THERE IS DOUBT ABOUT THE PERSON, THEN THERE SHOULD BE NO PROFESSION. **The benefit of the doubt goes to the fraternity not to the person in formation.** To tell a person, that there is not a good fit” between the person and fraternity TAKES COURAGE. (Use the suggestions from Anne Mulqueen to gently but firmly state that the person will not be professed. (State then listen. Do not add anything but the fact.)
- **MOST IMPORTANT: Prayer** in any discernment (for both the person who is in formation and for the fraternity council!) PRAYER! Bring to prayer the situation and the person continually through the process at each step.
- Some of the **Critical points** of discernment
 - **For the person in initial formation.** (These should be observed by the Formation team.)
 - Refer to Fr. Bach’s list for the “Signs of those who have a vocation....” And “Signs for those who do NOT have a vocation) in the Franciscan Journey.
 - **Spouse:** Has my spouse been fully informed of the changes in the life of the prospective OFS to be made? Is the spouse accepting of their vocation?
 - **“The Call”** Do they speak about their “Call” from God (not just their wishes?)
 - **Fraternity Discernment:**
 - **Commitment:** Are they inconsistent in attendance for fraternity or lessons and letting the council know if they have to be absent and why? Do they leave the fraternity gathering before the end? Are they following thru with the whole assignments for lessons?

- **Maturity and Interpersonal relationships:** Assess their ability to dialog and communicate. Is it “my way or the highway” or open to dialog? Are they able to forgive or do they keep grudges? Do they exhibit disruptive behavior at the meetings and do they “hog” the discussions revolving around their own perspectives and needs?
- **Conversion:** Does the person exhibit continual conversion and is aware of certain challenges and is working to change them?
- **Relationship with the Church:** (not only now but in the future)
 - Is the person willing to bind themselves closer to the church (from Rite of Profession)
 - To be willing to stand for the Church and its’ stances and obligations.

In summary: Importance of Discernment: Fraternity life can be damaged if the wrong person is professed. It can tear a fraternity apart and the fraternity can eventually die. **(TO DIANE)**

Diane's comments on Discernment

- A good way to help candidates focus on discernment in a natural way is through discussion of the lives of Francis and Clare
- **Recommendation**—St. Francis of Assisi: Passion, Poverty, and the many who transformed the Catholic Church by Bret Thoman—focuses on the process of Francis’s discernment—good springboard for discussion
- **Recommendation**—St. Clare of Assisi: Light From the Cloister—also by Bret Thoman.
- If you are interested in using these biographies, I will happily share the questions I have prepared for both that focus on discernment
- **Recommendation:** Discuss discernment as found in Scripture—for example the story of Jonah and the Whale—perfect for discussion – you can certainly think of others.

What should be included in a good ongoing formation program? How can Regional Formation Directors prepare themselves to be able to help local FDs set up good ongoing formation programs?

Ongoing formation

- We are responsible for formation throughout our lives as Franciscans
- RFDs should be well-versed in Franciscan material and in material that will serve to strengthen our own Franciscan vocation and the vocations of the local FDs.
- **Examples of preparation for RFDs:**
 - Courses
 - Reading—Franciscan authors on Spirituality, Early Documents, Francis of Assisi—the Early Documents—don't get rid of the *Omnibus*—the notes are great. This is also available online at Franciscantradition.org--Biographies of Francis and Clare, Franciscan commentaries on spirituality and the signs of the times, other authors/theologians who strengthen our knowledge of the church and our vocation as Franciscans, Rule and Constitutions
 - Pay attention to what the National Formation Commission has to offer
 - Participate in workshops, in person and virtual, to become aware of material that will benefit local formation directors
- RFDs should present local formation directors with ideas for **local** ongoing formation programs based on what they have learned from the above
 - Formation Fridays these are examples of what can be done for ongoing formation on a monthly basis
 - Local ongoing formation should fill the need for excellent ongoing formation but should be manageable in length of time needed for presentation and discussion (always allowing for plenty of discussion and sharing.)
 - Example format
 - Short presentation
 - Small group discussion (Some background on the topic and possible discussion questions can be provided prior to the fraternity gathering. This helps the members to think about the topic ahead of time.)
 - Large group sharing
 - Action items that might arise personally or for the fraternity—link it to an article of the Rule or Constitutions whenever possible

- Many fraternities like to read a book together
 - Not a steady diet or fraternity becomes a book club
 - This can follow the same format as above
 - Please strive to make the book Franciscan or something that will reinforce Franciscan Spirituality/vocation
- Some like to study scripture together
- The Rule
- Each of the above can be done in blocks of months or following a pattern, but the end result always should be transformation and strengthening the commitment of the members.

- **Layna added some suggestions**
- Add—ways to support ongoing formation
- Articles for regional newsletter
- Try to be timely—what's going on in a particular month—use those special Franciscan feasts
- Opportunity for us to grow and deepen our vocation
- Elements of the lessons in initial formation

How should a fraternity respond to someone who is ineligible or unsuited for membership in the order?

- Thank you, Diane. I don't claim to be an expert in such matters, but I have been professed more than thirty years, so I'll offer some thoughts based on my experience.
- The Constitutions state, "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." (39.2)
- It's possible for someone to fall short of those standards in different ways. There is no comprehensive list, however, a good place to start can be found on pages 17-18 of *The Franciscan Journey*. There Fr. Lester Bach, OFM Cap., offers us two lists. One is "Signs that may indicate a vocation to the SFO is not present."
- What might they be? A person who is not Catholic. A person who is in religious vows or who is already a member of what the Church terms a *public association of the faithful* (such as another third order). A person who seeks to impose private devotions on others. A person who is domineering or habitually disruptive. A Catholic who is in a marriage the Church does not consider valid. Other possibilities not on his list: Someone not in a position to or who is unwilling to accord life in fraternity the priority it requires. A person who denies Catholic doctrine(s) or rejects Church teaching(s) on faith and morals. Again, these are all just examples, not an exhaustive list.
- How should we respond to a situation in which an inquirer or candidate is ineligible or not suitable for membership? A few actions come to mind.
- First, make sure you know what you're doing. The minister and/or formation director may have an imperfect understanding of what they see as impediment. When confronted with a matter of serious concern like the potential ineligibility of a candidate, do your homework. Always involve the spiritual assistant. For a fraternity where a local spiritual assistant is not present, consultation with a regional spiritual assistant may be necessary. But don't forego this step. Not many of us are trained in canon law or pastoral counseling; it is always wise and prudent to talk to someone who is.
- A second point: be committed to dealing with the matter. We are often too kind and non-judgmental. We try to avoid confrontation at all costs. Loving kindness and acceptance are good things—that's who we are as Franciscans in the first place. But we still have a responsibility to avoid errors that would be detrimental to individuals or the fraternity. The key here is don't duck the issue.

- A third point: Always act lovingly toward the person. A very wise Capuchin friar I heard preach recently said that unlike some moral theologies that begin with a list of what is wrong or sinful, Franciscan moral theology begins with the Beatitudes. Jesus taught us we should be meek, poor in spirit, peacemakers. Prayer and meditation should precede dialogue with a person who is going to possibly be told he or she cannot become a Secular Franciscan. Be open to the workings of the Holy Spirit. Proceed deliberately but charitably, and respect privacy and confidentiality. Always keep in mind Article 13 of the Rule: "As the Father sees in every person the features of his Son...so the Secular Franciscans with a gentle and courteous spirit accept all people as a gift of the Lord and an image of Christ."
- A final point: In all such situations, take into consideration the good of the individual but just as importantly, the well-being of the fraternity overall. Remember that we are an order in the Church with dignity and purpose. For a person to continue in formation or to be admitted to profession who should not have been can have very unpleasant consequences for the individual but also for the fraternity.
- To conclude, in any situation dealing with the eligibility or suitability of a candidate, I believe the Council should respond with charitable dialogue and kindness but with firmness and confidentiality. Serious and prayerful preparation has to be undertaken. Read and study the Constitutions so that you are on firm footing. Always involve the spiritual assistant.

Anne Mulqueen added:

- Going in a slightly different direction.
- Reinforcing some of Justin's comments.
- Addressing how you handle delivering the bad news:

AS JUSTIN SAID:

- Have your SA accompany you.
- And keep it CONFIDENTIAL. –
 1. If they want to talk about it they can, but you shouldn't
 2. The council already knows and that's enough
- Painful news is difficult for both the recipient and the messenger
- After determining ineligibility
 1. Don't delay informing the person;
 2. It is disrespectful--unkind to allow someone to live with false hope;
 3. Be brief but be respectful;
 4. Don't say more than is necessary;
 5. God know the future--don't burn bridges. - -

Why do we have so much trouble delivering adverse decision?

- We don't want to disappoint them;
- We feel guilty;
- We don't know what to say – we're not sure of ourselves.

What should we do?

1. Don't do it alone – have the SA with you;
2. Know what you are going to say before you meet—be able to express it clearly.
3. Be truthful, give non-judgmental explanation;
4. IF it seems there is no hope, don't give false hope.
5. If there is an alternative, perhaps an annulment process, let them know;
6. MOST IMPORTANT: After you have delivered your message be prepared to listen and stop talking.

If the person reacts badly,

1. Think before you respond
 - a. Better to say nothing than the wrong thing.
2. Stand your ground, but continue to listen and
3. Don't take it personally –they are experiencing rejection.

Sometimes we wait too long to deliver difficult decisions.

WHY

It's not about us –

it's about the INTEGRITY AND LIFE of our FRATERNITY AND OUR ORDER.

When I was appointed national formation director, 3 commissions ago –

my wise spiritual assistant, Richard Trezza told me: If there is a serious doubt about the acceptance of an individual, the fraternity gets the benefit of the doubt.

Circumstances can change, but the fraternity must be protected.

What's the **importance of a Regional Formation team** and how do I go about **forming one?**

St. Francis was virtually always in community. While he did spend some time in solitude, he hardly ever did anything alone. He understood that we are brothers and sisters and we need one another.

Words from our RULE and Constitution, Sound familiar?

- Called to work together
- They should work together
- A sense of community will make them joyful
- Co- responsibility
- Coming together and collaborating
- Work together to spread the Gospel

TEAMWORK MAKES THE DREAM WORK: St. Kateri Region's Theme

- **Great Value**
- **Collective wisdom** and gifts from the community
 - Variety of Perspectives and experiences
 - Shared talents and learning from one another
 - Our NFC team is a great example, diversity is important
 - Multiple perspectives give a clearer picture
 - Share the workload
 - Share the struggles and celebrate the successes
- A great way to prepare someone to be the next RFD- succession planning
- Regional Spiritual Assistants are perfect members of the RFT
- Size of the team is important. I recommend 4 or 5 people.
- You can always reach out and include other LFD for specific projects and presentations where they can share their expertise
- RFD speak to the REC on the importance of connection that the RFD can bring to the region.
 - Connect local fraternity to the region
 - Sharing of information
 - Building of Community and relationship
 - *Secure financial support from the REC and have a designated line item for formation in the annual budget*
 - *Provide Support in difficult situations- i.e. unsuitable concerns, help connect with RSA*
- Reach out to the Local Formation Directors to see if there is interest in joining the RFT or serving for a particular event or area of interest/expertise
- Consider a survey to gather information, interest, expertise and NEEDS of your local Formations Directors, local councils, and maybe even open it up to all in the region.
- Remember you are a Servant Leader and your goal is to support the formation needs of the region and RFD's

Mary Stronach added:

Formation Teams – Part II – Mary's Comments after Layna

Have an honest discussion with your team about expectations and responsibilities. Get to know your team. Ask them their interests, the ideas they have about formation, how they like to work. Involve your formation team in decisions, presentations, action items for events and projects.

As director, you don't know everything, rely on them – using their strengths, expertise, skills and desires. Allow team members to take leadership roles.

Remember, the personality of each team member engages different types of people.

Be humble. Let your team members shine. Let them know how much you appreciate their input, the program they presented, the insights they provided. Formation is a fraternity responsibility so Invite other members of the fraternity to the sessions. They could be part of a panel on a topic or they can offer comments or insights during your program. They will become good candidates for the next Formation Team.

SPIRITUAL ASSISTANT'S ROLE IN FORMATION

Anne Mulqueen, ofs

A SPIRITUAL ASSISTANT SHOULD be involved in Initial and Ongoing Formation.

- 1.1. WHY? Because it's part of our JOB
- 1.2. The IDEAL, but NOT always possible.
- 1.3. Not every local fraternity has a SPIRITUAL ASSISTANT.
- 1.4. How many of you have a SPIRITUAL ASSISTANT involved in your actual formation sessions?
2. Those of us SPIRITUAL ASSISTANTS on this ZOOM call are familiar with our LEGISLATION....
3. BUT DID THE REST OF YOU KNOW that in OUR legislation there are FOUR MAJOR TASK FOR THE SPIRITUAL ASSISTANT (Art. 90.1)
 - 3.1. To COMMUNICATE FRANCISCAN SPIRITUALITY
 - 3.2. To FOSTER A DEEPER INSIGHT IN FRANCISCAN SPIRITUALITY
 - 3.3. To COOPERATE IN INITIAL AND ONGOING FORMATION
 - 3.4. To EXPRESSES our ASSESSMENT of each candidates before Profession.
4. In a letter to their respective Orders the Four Ministers General said:
As a sign of COMMUNION AND CORESPONSIBILITY—when requested
the Major Superiors are TO PROVIDE SPIRITUAL ASSISTANTS to the COUNCILS requesting them;
They are to select them with careful discernment as to their suitability for this service; AND
The Major Superiors are to provide specific formation for them.
AND THE FINAL INSTRUCTION WAS that the SPIRITUAL ASSISTANT assigned in a fraternity, should support seculars —who are responsible for initial and ongoing formation.

WHAT IS THE ROLE of the SPIRITUAL ASSISTANT IN INITIAL AND ONGOING FORMATION

1. Two-fold function →
 - (a) ASSIST and support the formation team (b) while helping in the formation of the inquirers and candidates
2. ASSIST by taking their lead from the formation team and council.
3. COLLABORATE, but do not direct initial and ongoing formation.
4. HELP plan and develop fraternity Rites and prayer services.
5. THEY DEVELOP A RELATIONSHIP with each inquirer, candidate, and member of the fraternity.

SPECIFICALLY WHAT IS A SPIRITUAL ASSISTANT'S ROLE IN INITIAL FORMATION

AN OBSERVER: LOOKING FOR THE FOLLOWING:

1. Do the Candidates and Inquirers understand the serious nature of a permanent commitment and the promises they will be making.
2. Do they have illusions about fraternal life – that everything runs smoothly and no one ever disagrees.
3. Do they have control issues or a personal agenda.

WE WATCH FOR GROWTH

1. IN GOSPEL LIVING – deep union w/ Christ and Trinitarian in nature.
2. Are they PERSONS OF PRAYER – and open to the MOVEMENT OF THE SPIRIT.
3. Do they exhibit LOVE for the CATHOLIC FAITH.
4. DO they understand SECULAR SPIRITUALITY as living in the world and for the world and for the Church.
5. Do they exhibit warmth and affection toward the brothers and sisters in fraternity.
6. Do they show Franciscan attributes: PEACE, PARDON, HUMILITY, GENTLENESS, JOY and SERVICE to those in need.
7. A willingness to bend to GOD'S WILL in the FINAL DECISION
8. The list goes on but those are my main criteria

SPIRITUAL ASSISTANT IN ONGOING FORMATION.

1. USEING EXTREMES as examples, but we know that people fall somewhere on a continuum.
2. What I look for when assisting in Ongoing Formation
 - 2.1. Levels of knowledge on a topic;
 - 2.2. Clarity or confusion
 - 2.3. Engagement or withdrawal—Interest or boredom
 - 2.4. Are they prepared for a session or do they want to be spoon fed;
 - 2.5. Are they attentive to the group or do they engage in inappropriate discussions and side-conversations.

SPIRITUAL ASSISTANTS need to remember they ASSIST—The COUNCIL ANIMATES AND GUIDES THE FRATERNITY

1. We provide a second set of eyes and ears for the council and formation team.
2. We support them in implementing their process;
3. We ARE A valuable resource PERSON
4. We provide a receptive, non-judgmental presence that enhances the bonds of fraternal life.

Virtual Initial Formation

St. Clare – Patron of TV, pray for us, inspire us to the best use of technology.

The miracle of modern technology has opened new doors for us. These last few months have given many of us the opportunity to experiment with virtual programs for formation, for council meetings, for prayer sessions, retreats.

It has reunited us with fraternity members who have moved to other parts of the country or have been homebound because of illness or age.

We've participated in Mass celebrations up close and personal and it has allowed us to continue our gatherings and formation sessions – both on-going and initial. We've had on-line retreats for our candidates and provided regular liturgical prayer. We've saved gas, time and paper, we've kept our order alive and functioning.

So, as we begin to re-open, we'll celebrate being able to spend personal time with our brothers and sisters live and in-person. We need that transition to the reality of personal presence to keep us connected and to revive our full life as Secular Franciscans – social beings who need to interact, enjoy a meal together, pray together before the Eucharist.

Should we, then, drop the virtual experience and focus strictly on live, person-to-person, activities? Having experienced the value of our on-line experience, I recommend that we incorporate the virtual experience into our total formation package.

Before the pandemic, my local formation team held bi-weekly initial formation sessions. With the pandemic, we've been having weekly sessions. As we transition back to in-person session, my team will probably implement the hybrid model – two in-person sessions and on alternate weeks, we'll do virtual sessions. In addition, we'll continue evening prayer and a morning prayer once weekly on-line – for the members of the fraternity who have internet access. We want use our newly learned skills in technology to enhance our programs and add other elements to our formation and fraternity activities.

Let me emphasize: Virtual Initial Formation should be used only as a part of a larger program which includes both person-to-person regular sessions and intermittently has virtual sessions to enhance and to keep the candidates active, thinking, and living the Franciscan charism. In a moment, Justin will explain why it is so important to ensure that we return to our fraternities and re-establish a strong personal bond as family.

Now, a few tips:

1. Before you begin the virtual sessions, take time to ensure that everyone on the call knows how to use the conference system – the mute and chat features, how to manage the gallery features so that their view of a shared screen is not blocked and how to

move the video screens on the computer. They should understand how breakout rooms work and how to return to the program, should they be cut off by internet problems.

2. Invite other members of the fraternity to join the sessions – they too are responsible for the formation of the candidates. An added benefit is that it is a way to reinforce their vocation, as well. It's so much easier for them to participate because they won't have to leave their homes. These virtual sessions allow our homebound members to be fully active once again. Their experience and their insights can be a rich addition for our candidates.
3. Offer small group discussions in the breakout rooms. Because an initial formation group is usually small, you can also use the breakout room for brief interviews with each candidate individually when you think it's necessary (this should not replace the regularly scheduled interviews.)
4. For those who use the phone to get into the programs, guide them through the process. Zoom requires three sets of numbers before they can be admitted. This requires a tremendous amount of patience for some of our aging members. When I used to participate in phone conference calls, sometimes I would misdial, and would have to start again. Patience, and a steady hand are absolute requirements. It might be easier for them to ask a younger member of the family/fraternity to help them go on-line.
5. I have had some members who refuse to even try the telephonic service and just use their speed-dial. They call my phone which I set up close to my computer so they can hear. This is awkward and often it's hard to hear.
6. Remember, those using the phone miss out on the visual experience of visiting with our brothers and sisters and the don't see the powerpoints or videos which we might use. They just don't get the full experience.
7. Another problem: Internet issues – the screen freezes – is it your problem or is it a problem from someone else in the group. Note: if you are the only one that's not frozen, it's probably your internet problem. This is difficult to control and can be very frustrating. Again, our patience is tested. Then, there are sound problems. Background noises of those who forget to mute.
8. To help keep order and to avoid people speaking over each other, put everyone on mute. If they want to share, tell them to raise their virtual hand and you'll recognize them so that they can speak. Or, as we have been doing during our session today, use the chat. It's effective and the message is clear for all to read.
9. Minimize lectures and try to make your sessions interactive – ask questions, invite candidates to share their ideas. Use the virtual world to your advantage – incorporating virtual tours of Franciscan locations, Franciscan videos and music, responding to questions by immediate searches on the internet. (While one formation team member continues with discussion, the other can access the information in question.)
10. Evaluate regularly – ask if they are having any problems using the virtual mode.
11. Invite the formation team to participate in all sessions, asking them to take leadership roles – based on their interest and/or interest in the topic. Show them how to share documents. You can share the screen with them so that they can upload a document.

12. Keep your sessions reasonable in length – no longer than 90 minutes – with a brief break after 45 minutes. During the break, ask everyone to stay on-line. This will reduce problems of getting back into the zoom conference.
13. Keep choral passages in your prayers short because the echoes are very distracting.
14. There's no need to make copies of your documents because everything is clearly visible on the screen. This helps conserve paper and saves you time.
15. Don't throw the virtual world away when having in-person sessions. With the use of a "hot-spot", accessed through your smart phone, you can have Mass together, listen to an inspirational speech by one of our many Franciscan friars and OFS around, link with candidates from other parts of the world and build important fraternal relationships. As a formation team, you may want to collaborate with other formators to bring your candidates new OFS perspectives and realities from around the US and the world
16. At the end of the virtual session, close with prayer, give them a three-two-one and then end.